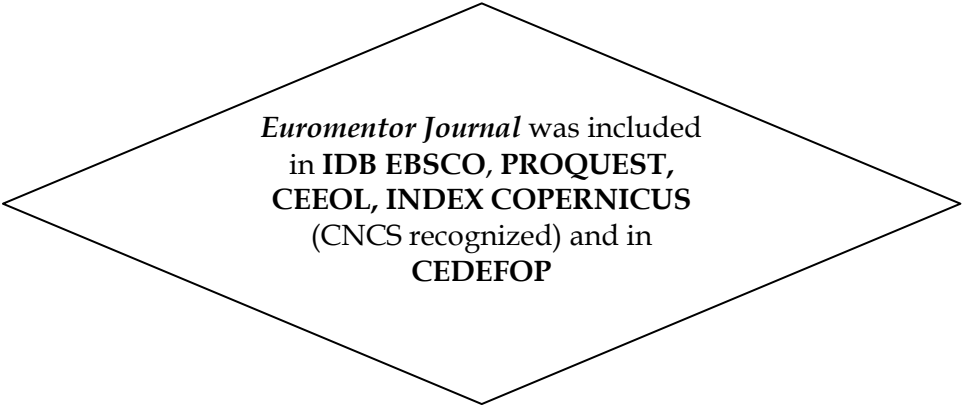


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THE RELATIONSHIP BETWEEN CONSCIOUSNESS AND UNCONSCIOUS IN ȘT. ODOBLEJA'S CONCEPTION*

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MIHAELA MOCANU***

Abstract: *The title of the present paper is unique and challenging for Ștefan Odobleja's conception because a mechanistic, physicist, even reductionist approach on the human psyche, as we find in the Romanian thinker's work, does not leave any room, apparently, for such a relationship where consciousness is an epiphenomenon, without any relevance for the psychic or neuropsychic machine, and the unconscious does not exist. There is no need for consciousness to realize an implementation structure, a feed-back; so, it is understandable that this process is automatic, unconscious, even if the unconscious is repudiated by the author. Odobleja wrote about consciousness and unconscious in his Consonantiste Psychology, but approached them separately. His conception on the two instances of the human soul is the prerogative of a physiological, neurophysiological vision, and that is why the above mentioned author, when speaking about consciousness, refers rather to the state of conscience, behavior being a result of consciousness. We can speak about levels of consciousness, but high level consciousness is a complicated process that can be studied not only from an informational, physiological point of view, but it also includes, undoubtedly, the psychological aspect, and, especially, the philosophical one.*

* This paper was presented within the International Scientific Symposium "Present Eternity. Ștefan Odobleja" which was held in Drobeta Turnu-Severin in the period 29-30 October 2016.

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*** Ștefan Odobleja is a Romanian scholar, author of the monumental work *The Consonantiste Psychology* (1938). He cannot be considered the founder of cybernetics, this is, undoubtedly, Norbert Wiener's merit, but Ștefan Odobleja is not only a precursor of cybernetics, he also has the world priority of the idea of a generalized cybernetics, considering the phenomenon of the closed loop, with reverse connection, as a universal law. Odobleja is the first who tried to apply the law of feed-back (the law of reversibility) to as many fields as possible. In this way, he delimits himself from all the particular cases where reverse connections were highlighted (see our study "Consonantiste Psychology and Cybernetics. From Șt. Odobleja to N. Wiener", EUROMENTOR, no.3 / September 2016).

Keywords: *consciousness, unconscious, conscience, consonantiste psychology, thought, philosophy, feedback.*

I have chosen to present before you an aspect that I find particularly important for understanding the essence of Ștefan Odobleja's conception, about which nothing has been written, on the one hand, and on the other hand, the problem of consciousness is a philosophical and scientific research theme I have been concerned about for several years; I have published studies and articles in this respect, I have presented papers at international conferences focused on the philosophy of consciousness and unconscious.

The issue of consciousness is a theme with inter and trans-disciplinary character, requiring both a scientific and especially philosophical approach, given the fact that *philosophy is, par excellence, an activity of the consciousness. The prerequisite of this analysis is that Șt. Odobleja's reference work, "The Consonantiste Psychology", even though it was developed mechanically, as the author confesses, is not a neuropsychology treaty, it is more than that, it is a philosophy of mind, a work of thought,* which could not omit the issue of consciousness and the unconscious. From this perspective, I consider that the aspect concerning *the relationship between consciousness and unconscious in Odobleja's vision,* which I intend to present to you, can provide a key to understand the essence of his thought.

1. Psychology and consonantiste psychology

It is a difficult issue to present and argue, in a short time, but I think it is very important to know how Șt. Odobleja thought in terms of the two instances of the human soul. One cannot write a treaty of psychology, what is more, of consonantiste psychology, avoiding the relationship between consciousness and the unconscious because, as Freud said, "the psychic life is a field of battle and antinomian couples".¹ I believe it is necessary to show briefly how Șt. Odobleja thought psychology in general because it is linked to the consciousness approach: "Psychology is the science of the soul, of the consciousness, of the consciousness phenomena. It is the science of direct facts, of inner experience, of psychic facts or phenomena, a science derived from introspection. ... It is the brain physiology, the central and fine physiology of the relation apparatus. It is

¹ Sg. Freud, *Introduction to Psychoanalysis*, Bucharest, The Didactic and Pedagogical Publishing House, 1980.

the science of reciprocal actions exerted by stimulation, adaptation or adjustment and response between an organism and its environment. It is the brain physics, the science of physical phenomena perceived internally (propagation, balances and imbalances, consonance and dissonance, actions and reactions, uploads and downloads, etc., physical conception, supported in the Consonantiste Psychology, as the author himself confesses.² Thus, his physicalistic conception on psychology will have left its mark on his vision of consciousness too.

It is important to note that Șt. Odobleja addresses consciousness and the unconscious distinctly, although the two instances of the human soul can be approached only in their relationship. This is no coincidence because the Romanian thinker does not admit the existence of the unconscious at the psychic level, vehemently criticizing the Freudian conception which he categorically denies.

What Odobleja undertakes in the chapters about consciousness and the unconscious is in fact a synthetic, but selective presentation, of some viewpoints about consciousness and unconscious existing in the specialized literature. I do not intend to present a summary of these chapters because they can be found in the "Consonantiste Psychology". What is surprising, in our opinion, is how this problem is addressed, the way it is related, par excellence, to consciousness, or rather to awareness, but from a reductionist, mechanistic perspective. I find interesting the inclusion of the consciousness in the chapter "Subjective Consonance" where he dealt distinctly with self-consciousness, introspection.

Although Șt. Odobleja advocated the mechanization of thought, the consciousness theme included in this chapter entitles us to claim that the author somehow went beyond the physiological vision and approached the psychological research of consciousness, otherwise his conception of psychology as the science of consciousness, of direct facts of consciousness, of introspection would not be justified.

We think it fair to point out that when speaking about consciousness, Șt. Odobleja refers to **awareness** because, in our opinion, psychology has so far failed to explain consciousness, even neurophysiology, maybe the quantum physics using many concepts from philosophy. Moreover, the rational, scientific faith of the author is concentrated in the idea: „**In life we are concerned only with what is conscious**”.

² Șt. Odobleja, *The Consonantiste Psychology*, Bucharest, The Scientific and Encyclopaedic Publishing House, 1982, p.67.

Therefore, we understand that Odobleja repudiates the unconscious, somehow the human psyche, identifying himself, in his vision with the conscious behavior.

2. Consciousness and unconscious

I will present you a text from "Psychology and Cybernetics" ³, which, in my opinion, is somewhat the author's confession about the essence of his scientific approach: *"I was extremely introspectionist, but also extremely extrospectionist and extremely reductionist by reducing the introspective to the extrospective. I started from the deepest, foggiest depths of mind and thought, from the most pronounced bias, to get to the highest degree of objectivity, reality and materiality, culminating in the mechanization and materialization of thought. Trying to embrace as much and possible and even all, I was led to the proximity of some extremes and then to their union. I cultivated an extreme materialism and physicism and an extreme dichotomism, an extreme binary, an extreme circularity of all mental processes and all sciences. I was extremely unifying in all sectors and at all levels.... The mechanization of thought was the target to which I aspired, which guided me and emboldened me to work under the illusion that I would reach it, in fact, one time, feeling that I had already reached it... Mechanization was a corollary of the physicist and machinist conception. It came as a culmination and a peak of that conception - a peak of psychological physicism and its last conclusion"*.⁴ We appreciate, without fear of error, that this text with confessional character may be **Șt. Odobleja's scientific creed**.

A physicalistic approach on psychology is based on the idea that the psyche is a psychic machine. Thus, he believed that man is a machine. La Mettrie's influence is obvious ⁵, for him absolute mechanicism leads to the identification of the spirit with mechanical processes. In fact, Descartes is the one who raised for the first time the problem of the relationship between man and machine, La Mettrie proceeds to their identification. Ștefan Odobleja also thought, he was even sure, that artificial thinking can be created by mechanical consonances that should be homologous to the consonants from the energetic-psychic plateau. Admitting that the psyche

³ Idem, *The Consonantiste Psychology and Cybernetics*, Craiova, The Romanian Writing Publishing House, 1978, p. 126.

⁴ Ibidem, p.128.

⁵ La Mettrie, *Man-Machine and Other Philosophical Works*, Bucharest, The Scientific Publishing House, 1961.

has its own specificity, of energetic nature, he inferred, based on the universal laws, among which the law of reversibility has the main role, the possibility of mechanizing the psyche. What was accomplished in Odobleja's vision is the development of artificial intelligence, but we cannot say that all the human thinking would be achieved artificially, by mechanical or electronic means. Odobleja expected the mechanization of development, of intellectual activity, hoping that afterwards philosophy creative machines would emerge. If the human mind is a machine, indeed, then man should be able to build such machines. It has not been proven, and there are no reasons either to suspect that creative activity can be automated.

The philosophical viewpoint expressed by Odobleja on the human psyche, and implicitly on consciousness, is materialistic. Due to his materialistic vision, he did not find it hard to expand the role of reverse connections at psyche level. What distinguishes his vision from the model of reverse connections in physiology is the idea of consonance bearing in its embryo, at the mental level, the concept of internal model. In this respect, Ștefan Odobleja went beyond the physiological vision and justified his assertion that *he developed his cybernetic conception starting from psychology*.⁶

Șt. Odobleja considers consciousness exactly as today's neurocybernetics does, as an epiphenomenon without any importance for today's psychic or neuropsychic machine. Therefore, although he conceives the specific bias of the psychological field in relation to the substrate of the nervous system, at the same time, he limits it, failing to recognize not only the subjectivity but also the specificity of the *awareness* phenomenon. High-level consciousness is an intricate process that cannot be studied only from an informational or physiological viewpoint, the complex approach of consciousness requiring both psychological and philosophical research, which also takes into account the unconscious. The oscillations of the consciousness threshold and the narrowing of the consciousness field represent qualitative variations of the same qualities: intensity, extent, duration, etc. that underlie any psychic energy. It would be absurd, Odobleja considered, to imagine the unconscious as an ocean that grows at high tide and decreases at low tide, in parallel with the

⁶ G. Pohoată, *Consonantiste Psychology and Cybernetics. From Șt. Odobleja to N. Wiener*, *Euromentor Journal. Studies about Education*, no.3/September 2016, Bucharest, Pro Universitaria Publish House.

corresponding brain atrophies or hypertrophies. The criticism of the unconscious is extremely contradictory, starting from the unconscious hypothesis and reaching the unconscious theory. The unconscious hypothesis is an error, the result of a way of thinking that sins by excess or by shortage. That most blamable thing is not the hypothesis in itself, but rather the ease of accepting it as such, without control and critical spirit. Odobleja argues that the unconscious has never been studied seriously, what was done in this respect being very superficial.

The theory of the unconscious is a mystification of psychology, a form of skepticism and ignorance, a form of the indeterminism and occultism, an aspect of religious and pessimistic fatalism. The unconscious does not exist, it is an absurd and unacceptable fiction that has no reason to figure in psychology. Today, in our country, there are even works on the philosophy of the unconscious.⁷ The unconscious remains, Odobleja concludes, a hallmark of the rationalist and animist psychologies, it is their clue and distinctive mark that allows us to recognize the animists and psychologists disguised under scientific appearances. Even if he denies the existence of the unconscious at the Human Psychic System level, Odobleja contradicts himself when he argues that there is no need for a conscience to achieve an execution structure, in his conception, this is the circle. If the regulation by action and reaction, the feed-back in the living systems occurs automatically, without the intervention of consciousness (which is true!), then which is its psychic nature?

3. Conclusions

Man is not conscious all the time, man does not think all the time. Thinking, being aware, actually means understanding, a phenomenon which is psychically experienced as a state of enlightenment. Man cannot control everything, even if he is endowed with reason, not even the one who strives to use this gift correctly. There is always something that escapes our knowledge. Man acts under the influence of impulses, emotions, which come from our unconscious, the superconscious mind, as Freud used to call it. "Man bears the burden of the unconscious".⁸ The unconscious is the deepest part of the soul, the inner being, the basal psychism, while the consciousness is the exterior being, which was given

⁷ D.V., Zamfirescu, *The Philosophy of the Unconscious*, the 3rd complete edition, Bucharest, Three Publishing House, 2009.

⁸ Sg. Freud, *cited works*.

to man by God so that man may be able to discover that there is in each of us, as Augustine said "something deeper than the human soul itself. *Deus interior intimo meo*",⁹ hence the idea that the unconscious is the "seat of transcendence within ourselves". There is a metaphysics of the unconscious¹⁰, which can lead us towards understanding the idea that a lucid and awake consciousness knows its limitations and accepts them. In this respect, H. Bergson, in his work "Matter and Memory" claims that "all the past is stored in the unconscious, and the consciousness allows to pass into its field only those elements which are useful for the present".¹¹

Consonance, in Odobleja's vision, means harmony, and the consonantist psychology involves a law of harmony that can be completed with the relationship between consciousness and unconscious, because normality in living systems means the harmony between consciousness and unconscious (when they are in conflict, neuroses arise).¹² Although Odobleja devotes a chapter to morality in his "Consonantist Psychology", he does not insist on the relationship between consciousness and morality, implicitly he does not insist upon virtues in order to deepen and define them, some critics considering it a flaw of his work. But we cannot conclude without analyzing the definition of morality, which he considers a guideline for the individual, family and society. Thus, Șt. Odobleja defines morality as "... a science of good and happiness. It is the philosophy and physical and psychic hygiene of social life. It is the science of social balance. It is science of the agreement or consonance between the individual interests and the interests of society. The science of harmony and balance between self and society".¹³

Although in his life he underwent a lot of hardships, the Romanian scientist managed – due to his strong will and thirst for knowledge – to convey us the meaning of the "Romanian character", namely the "depth of thought and sensitivity, of emotional feeling, both in speech and through his deed".¹⁴

⁹ Augustine, *Confessions*, Bucharest, Humanitas Publishing House, 1998.

¹⁰ G. Pohoată, *Is there a Metaphysics of the Unconscious?*, www.upm.ro/gidni3

¹¹ H. Bergson, *Matter and Memory*, Iași, Polirom Publishing House, 1996.

¹² Alfred Adler, *The Sense of Life*, Bucharest, Gold Encyclopaedic Universe Publishing House, 2010, p.119.

¹³ Șt. Odobleja, *cited works*, p.537.

¹⁴ C. Cozma, *In the opening of the Romanian Moral Philosophy*, Bucharest, The Didactic and Pedagogical Publishing House, 2008, p.35-36.

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HOLOSTIC VIEW OF CONTEMPORARY CULTURE: THE REALIZATION OF ACADEMICIAN SOLOMON MARCUS' SPIRITUAL LIFE

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Abstract: *All our great ancestors possessed such spirit, intellect and encyclopedic culture, as they are the ones who have succeeded in plucking the weeds from the land of ignorance in order to fertilize it for the generations to come. Among these people, who invite us to have a holistic perception of culture, there is Solomon Marcus, professor and Academician, is a prominent figure.*

Keywords: *scientific culture, artistic culture, perfect numbers, differential calculus and integral calculus, spirit.*

Traveling back to the dawn of science, we discover the vision of Pythagoras' school. It has established a new spirit that has changed the course of mathematics, setting the Number as their idol. In order to discover the spiritual mysteries of the universe and the proximity to the gods, the Pythagoreans have tried to understand the hidden connections between numbers. Pythagoras thought that the "perfect" numbers bared an important significance. The perfection of these numbers depend on their divisors. A number was considered "perfect" (teleios) if it is equal to the sum of its divisors, excluding the number itself. For instance, $6=1+2+3$, $28=1+2+4+7+14$ are the first two "perfect" numbers. Positive integers whose sum is greater than the number itself are called "abundant", and if the sum is less than the number, it is called "deficient". Pythagoras considered perfect numbers to be rare among natural numbers, just as people who possess special talents are rare among their peers. His intuition was outstanding for, up until 2004, the first 41 perfect numbers have been discovered. Throughout history, the search for these numbers has urged great mathematicians like Euclid, Fermat and Euler to discover new and splendid theorems in number theory.

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Among the Romanian mathematicians who have been talented researchers and had amazing qualities, Solomon Marcus, the professor and Academician, holds a special place. The sentences utilize the present simple as his work as well as his spirit will endure- a halo in the shifting horizons of the future.

An elite mathematician, authentic researcher, with an encyclopedic activity, proving an inalterable youth, he has ennobled his teaching, research and writing activity. The reading of any of Professor S. Marcus' books emphasizes the saying that: *a good book is not written, but it writes itself*. His texts are an invitation to reflection, meditation to try and highlight and enrich essential aspects of the considered topics, through a holistic perception.

On these topics, Professor Marcus crystalized the notions, purifying them through his exceptional spirit, and then clarifies them for us not through sight, nor through the mind, but through our entire being, thus purifying us as well. Clarification bears purification within itself. Thus, the ones who were fortunate to meet him, were helped out of their wandering into finding their way. He is an excellent example of a highly educated man who invites us to a "conscious awakening" in this period characterized by the drama of the contemporary man, devoid of conscience. His works are for the rational mind in which the real, permanent, fatal interests of the human existence reside.

The curve of human progress returns to its origin after wandering through technical civilizations towards the clear horizons of spiritual freedom, to the inner realities of the spirit which have been infused by moral, aesthetics and culture thousands of years ago in Hellas, Judea, India and Egypt.

The holistic approach has the advantage that, through emphasizing a certain meaning, the rest of them will not be lost, advocating an inclusive attitude, allowing the analysis of all disciplines discovering the basis of human knowledge and behavior.

Professor Marcus has taught his pupils to climb the mountain of knowledge, to leave the worldly worries behind in order to approach the "invisible" (new subject to be researched, the hidden string that ties them all together) with a clear mind.

If we reconsider the five challenges listed by Maimonides (1) the difficulty of metaphysics, of the thing-in-itself, its subtlety and profundity; 2) people's inability in general; 3) the length of preparatory studies; 4) the natural dispositions; 5) the care for the needs of the body), we can infer

that Professor Marcus has successfully overcome all of them. His discretion has manifested throughout his whole life, reinforcing the Greek saying “being qua being”, a quality that is, unfortunately, rare among peers. He encouraged us to an intellectual solidarity for the spirit to collaborate with matter, in order to later dominate it. By offering his students a burning zeal to seek perfection, he has offered them more than perfection itself.

A common trait of all traditions is the infinity seen as an attribute of a Deity. Hermann Weyl argued that the science of infinity is mathematics.

Solomon Marcus has found the sweet taste of infinity and paradoxes in mathematics. We must remember D. Hilbert’s wonderful definition: “mathematical analysis is a symphony of the infinite”. With that in mind, S. Marcus has turned to new fields of the ‘60s, mathematical linguistics and mathematical poetics, which then led him to the study of the theory of programming languages, semiotics and biology. Gradually, his research has led to emphasis of some universal paradigms whose meanings transcend the whole human knowledge.

Solomon Marcus, the Professor

At his mathematical analysis courses, Professor Marcus would present the evolution of things with the struggles and the improvements later brought by scientists. He would present how the notions came to life, how they evolved and the diverse ways to approach the complete demonstrations of the discussed theorems, thus offering the students new sources of inspiration that encouraged them to a more in depth study. The sheer evocation of the past stands as the echo of the voices from long ago. These qualities of his courses denote an exceptional academic training, love and respect of young values and a graceful pedagogical gift. Historical forays give us the possibility of a new attitude towards people representative of human history. A scientist and a man of culture, Professor Marcus remains a model not only of generosity, but also rigor, advocating the enrichment of the inner life needed to create our own pacifist mentality.

Being fond of youth, S.Marcus focused both on our educational system and our youth’s and their teachers’ access to knowledge. He conducted 18 PhDs in our country. He encouraged the following young people who were to become teachers and scientists to research: Toma Albu, Alexandra Bagdasar, N.Boboc, C.Calude, C.Foias, S.Guiasu, M.Iosifescu, Gh.Paun, Dana Tautu, L.Tzafriri, V.Vianu, S.Zaidman,

Alexandru Zaharescu, T. Zamfirescu. He conducted the PhDs of several foreign mathematicians as well.

The connection between mathematics and music, done by Pitagora, has been made by the professor Solomon Marcus through the association between the studies of the mathematician Dan Vuza and the musician Anatol Vieru, which then lead to an astonishing echo among the specialists.

He emphasized that the hunger for knowledge implies the freedom of spirit, which become "the weapons" of humanizing specific to the scientific and moral progress. He learnt from Gr. C. Moisil that mathematics is more than just a discipline: it is „a way of seeing the world, a way of living life", Plato, Kant and Goethe were brought together by this idea.

Thus, a feeling of intellectual solidarity is created between mentor and disciple. Life must win continuously in order to achieve higher forms. He was attracted from the very beginning of his career to educational issues. He pointed out the dangerous skidding, the controversy aroused by lowering the level of the educational standards in both schools and universities.

Solomon Marcus has realised a journey through the linguistic mathematics by collaborating with a promoter of the structuralist current, Emanuel Vasiliu, and was then materialised in the book¹. This piece of work stirred interest in Paris and New York. The French mathematician Jean Favard, renowned for his research in almost periodical functions, as well as the great Danish linguist Louis Hjelmslev, the creator of glossemantics, were interested in the book, believing that it represented a superior level in linguistics. In 1967, the book² is published, followed by³ at the Academic Press, in New York, and then a mixture of theirs⁴ was published in Czech, at Prague.

Solomon Marcus, the Mathematician

He studied at the Faculty of Mathematics from Bucharest (1945-1949), he graduated with a Merit Diploma, then he became Assistant Professor (1950-1955), Lecturer (1955-1964), Doctor in 1956 ("Monotonic Functions of Two Variables"), Associate Professor (1964-1966), Professor in 1966 and Professor Emeritus in 1991. In 1993, he was elected Corresponding

¹ Solomon Marcus, *Mathematical Linguistics*, The Pedagogical and Didactic Publishing House, 1963, p. 220

² Idem, *Introduction mathématique à la linguistique structurale*, Dunod, Paris, 1967, p. 282

³ Idem, *Algebraic Linguistics*, Academic Press, New York, 1967.

⁴ Idem, *Algebraické modely jazyka*, The Academy Publishing House, Prague, 1967, p.289

Member of the Romanian Academy and Full Member of the Romanian Academy (Academician), in 2001. Carrying on the tradition of the Romanian school of thought of Real Analysis, as successor of D.Pompeiu, S.Stoilow, M.Niculescu and Al.Froda, as well as schools of thought with the same profile from France, Italy, the Polish school of thought of set theory and topology, S. Marcus published over 100 articles in periodicals from Europe, North America and Asia. As an impact, his articles were quoted by over 300 authors in over 70 journals and monographs. Many of his articles have represented new concepts and starting points for new mathematical results and problems. The topics of his research were from the following fields: mathematical analysis, theoretical computer science, measure theory and linguistic topology, history and philosophy of mathematics, poetics, semiotics and applications of mathematics to natural and social sciences.

Solomon Marcus, the Author

The Academician S. Marcus was mentored by the grand professors, scientists and academicians: Miron Nicolescu and Grigore C. Moisil.

He published approximately 59 books in Romania (I had the privilege of being the co-author of one of them⁵) and 428 scientific articles (studies, memoirs, essays, etc.). S. Marcus is quoted in 35 encyclopedias and dictionaries from the whole world in the fields: mathematics, cybernetics, linguistics, social sciences, aesthetics, literature, theatre. He participated, as a guest teacher in over 250 national and international conferences. He was distinguished with numerous prizes. He was awarded the title Doctor Honoris Cauza at the Universities of Bacau, Ovidius from Constanta, Craiova, Petrosani, Timisoara. In 2005, he received "The Opera Omnia prize accompanied by plaque, for his entire scientific activity".

In 2010, "Mihai I, through God's grace and national will, King of Romania, to everyone present and future Health, wanting to reward the merits of Mister Academician Solomon Marcus, because his scientific work is an act of fidelity to the Romanian state and consistent with the values and principles of the Royal House of Romania. For the correctness, professionalism and excellence of his interdisciplinary studies in fields such as

⁵ S. Marcus, P. Alexandrescu, S. Rădulescu, M. Rădulescu, C. Chiteș, D. Petriceanu, *Mathematical Analysis and Algebra* for the 12th grade, Bucharest, Nomina, Publishing House, 2010.

the use of mathematics in linguists, in theatrical analysis, in natural and social sciences, we offer him the Royal Decoration "Nihil Sine Deo".

On the occasion of the 7th Congress of Romanian Mathematicians (2011) "as a token of high appreciation for his entire activity, for his efforts to mark the high level of the Romanian school of thought of mathematics in the international scientific life", the Academician Solomon Marcus received the Order of Faithful Service in Degree of Grand Officer from the President of Romania.

"The past years have brought me satisfaction through the interesting reactions received towards my educational activity of over 60 years, and towards my scientific activity. I have found myself again in the reactions of others and the portrait thus configured differs essentially from the one I had painted. My memory is now surprised, most of the times pleasantly, by finding myself in the memory of others."

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UN PROSPETTIVA PEDAGOGICA DEL RAPPORTO TRA ADOLESCENTI E POLITICA

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Abstract: *In the present article it will be made a reflection on the relationship between politics, youth and education based on the awareness that today, in an era of profound social changes and strong values disorientation, terms such as democracy, citizenship, social responsibility, seem to have lost their deep meaning and therefore require a new commitment to education.*

Keywords: *Education, democracy, politics, youth.*

Introduzione

La necessità di effettuare una riflessione sul rapporto tra politica, giovani e pedagogia nasce dal fatto che oggi, in un'epoca di profondi mutamenti sociali e di forte disorientamento valoriale, termini come *democrazia, cittadinanza, responsabilità sociale*, sembrano aver perso il loro profondo significato e richiedono pertanto un nuovo impegno educativo. Infatti, se fino a ieri tali concetti erano implicitamente considerati finalità e preoccupazioni della politica, oggi invece appaiono solo strumentali ad essa. La politica oggi, come emerge da una indagine statistica¹, è considerata dai giovani *mera tecnica di governo e gestione del potere* e il suo obiettivo originario, quello di *promuovere la partecipazione sociale e rendere ogni soggetto cittadino attivo e responsabile*, sembra essere diventato, ai loro occhi, solo una utopia. Di qui la disaffezione giovanile verso la politica e la perdita di senso del significato autentico della democrazia.

Ma se la politica, come afferma Bertolini², è *un progetto di vita sociale, un orizzonte di senso, una prospettiva capace di legittimare e dare significato ad*

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¹ Cfr EURISPES, *Rapporto sulla condizione della infanzia e della adolescenza 2016*; C. Buzzi, A. Cavalli, A. De Lillo (a cura di), *Giovani del nuovo secolo, Quinto rapporto IARD sulla condizione giovanile in Italia*, Bologna, Il Mulino, 2016;

² Cfr P. Bertolini, *Educazione e Politica*, Milano, Raffaello Cortina Editore, 2003;

ogni attività e ad ogni intervento di vita, come è possibile risvegliare oggi l'interesse dei giovani alla partecipazione politica e recuperare il senso della democrazia? E' stato nel cercare di rispondere a questa domanda che ho compreso quanto importante sia il ruolo della pedagogia di fronte a questa problematica dal momento che uno dei principali compiti dell'educazione è quello di promuovere, attraverso la costruzione delle identità personali, la relazione, la comunicazione, il rispetto dell'altro, la condivisione di valori e l'esercizio responsabile della libertà di pensiero e di azione. Ed è a partire da queste riflessioni che il mio contributo ha preso corpo.

1. Lo sguardo degli adolescenti sulla politica

Partiamo dai dati di fatto. Oggi come emerge dai risultati del Rapporto Nazionale sulla Condizione dell'Infanzia e dell'Adolescenza 2016, il numero dei giovani iscritti ai partiti è sempre più in calo ed è sempre minore anche la loro fiducia nelle istituzioni nonchè l'interesse verso il dibattito istituzionale. Da tale Rapporto emerge inoltre che il 70,8% degli adolescenti italiani è poco o per niente interessato alla politica e per la maggioranza dei ragazzi la situazione politica del nostro Paese appare difficile da comprendere. Da ciò emerge che i giovani non sono interessati alla politica in quanto nutrono sentimenti di diffidenza nei confronti di una classe che non ritengono portatrice di ideali collettivi ma solo di interessi personali e privati. La politica attuale non sembra in grado di proporre progetti, realizzare soluzioni e indicare prospettive per la realizzazione di una società migliore.

Sempre secondo tale sondaggio non siamo di fronte alla consueta disaffezione giovanile nei confronti della politica ma ad un allontanamento più profondo che si collega non solo alle modalità con cui i politici comunicano e si relazionano con gli elettori, ma soprattutto ai contenuti che propongono. Sembra dunque che la classe politica, pur essendo consapevole dei problemi dei giovani, non riesca effettivamente ad ascoltare le loro richieste, a comprendere il loro linguaggio e a risolvere i problemi che li riguardano, ma soprattutto che non riesca a veicolare valori e ideali forti che permettano loro di identificarsi e proiettarsi nel futuro.

Di qui la mia prima domanda: *è la crisi della politica che provoca la mancanza di idee forti e di valori o è la mancanza di idee forti e di valori che produce la crisi della politica?*

Non si può non considerare che negli ultimi decenni abbiamo assistito a molti cambiamenti di natura sociale, culturale, religiosa ed economica che hanno modificato il nostro modo di vivere, di pensare e di agire ed hanno visto quindi anche la politica cambiare i propri orizzonti e le proprie prospettive. Tale processo tuttavia non è stato accompagnato da una valida riflessione sulle direzioni di senso e sugli orientamenti di valore da perseguire con la attività politica che invece sembra essersi limitata ad impegnarsi a risolvere, e non sempre in modo adeguato, le emergenze e i bisogni dei cittadini come se questo fosse il suo unico compito. Le azioni politiche che si sono succedute nel tempo sembrano cioè essersi espresse senza manifestare più un ideale, un chiaro orizzonte di senso capace di legittimare le azioni e le scelte dei partiti

Ed è proprio questo che i giovani lamentano. Così, sempre più timorosi e pessimisti nei confronti del proprio futuro personale e professionale, sempre meno protagonisti della scena sociale, i ragazzi di oggi hanno preferito per lo più chiudersi nel loro privato convinti che la società non sia capace di offrire loro opportunità interessanti e prospettive di ampio respiro ma costituisca solo un contesto con cui scontrarsi quotidianamente per cercare di affermare i propri diritti. Questa mancanza di fiducia nei confronti della società, ha così provocato nei ragazzi insoddisfazione, frustrazione, noia, disillusione, atteggiamenti che si riflettono in molti ambiti della loro vita. La *attività politica*, per loro, è solo *vita di partito* ed ha perso il suo significato originario di *luogo di cittadinanza*.

Sempre dal rapporto, però, emerge un ulteriore aspetto relativo all'atteggiamento dei giovani nei confronti della politica: la voglia di essere comunque protagonisti attivi della scena sociale. Come appare chiaramente dai dati, infatti, se da un lato i giovani hanno un livello basso di *partecipazione politica manifesta*, *quella convenzionale* caratterizzata soprattutto dalla vita di partito, presentano dall'altro un livello decisamente alto di *partecipazione politica latente*, *quella non convenzionale*. Questa riguarda tutte le forme di aggregazione sociale senza scopo di lucro che vedono i giovani impegnati per dare un contributo attivo alla società attraverso azioni di volontariato o di impegno sociale più in generale, che si esprimono in forme di "associazionismo solidale". Infatti, dai risultati delle cinque inchieste Iard³ sulla condizione giovanile in Italia effettuate dal 1983 al 2000 con cadenza quadriennale si ricava che:

³ Cfr C. Buzzi, A. Cavalli, A. De Lillo (a cura di), *Giovani del nuovo secolo, Quinto rapporto IARD sulla condizione giovanile in Italia*, Bologna, Il Mulino, 2000;

- la partecipazione sociale dei giovani italiani, il cui asse portante è l'associazionismo, è una realtà oggi molto diffusa; l'impegno dei giovani è sistematico, fortemente pragmatico, espressivo, legato alla propria autorealizzazione, non privo di ideali;

- all'associazionismo si deve riconoscere una certa capacità di rafforzare la fiducia interpersonale costituisce il substrato delle forme di partecipazione politica non convenzionali, in particolare delle forme più moderate”⁴

Il desiderio dei giovani di essere protagonisti e di individuare strategie che favoriscono la loro partecipazione attiva, è stato l'oggetto del 1° Congresso del *Forum Nazionale dei giovani* (Fng), intitolato "*Here we are*", realizzato a Roma nell'Aprile 2004. Questo Forum, nato ufficialmente nel febbraio del 2003, è l'organismo ufficiale di rappresentanza di quarantaquattro associazioni sociali giovanili e rappresenta, attualmente, circa 3 milioni di giovani

Tale congresso per i temi affrontati e per il forte livello di coesione tra le associazioni giovanili che lo costituiscono, evidenzia l'esistenza oggi di una realtà giovanile più matura e consapevole di quanto comunemente si creda. Il messaggio del congresso infatti, come riportato dal quotidiano "*Avvenire*" del 18 dicembre 2004, era chiaro: "*Vogliamo essere ascoltati e contribuire alla realizzazione di una legge quadro per le politiche giovanili*"⁵.

Il Forum è nato autonomamente, per volontà di un pugno d'associazioni giovanili e per ora risulta essere l'unico organismo di rappresentanza in grado di colmare l'assenza nel nostro Paese di un Consiglio Nazionale dei Giovani. In Europa, infatti, solamente l'Italia e la Polonia ancora non hanno una consulta giovanile e una legge quadro sulle

⁴ Cfr A. Roberto, *I giovani e le nuove forme di partecipazione*, Bologna, il Mulino, 2005;

⁵ "(...) Nato ufficialmente nel febbraio del 2003, il Forum Nazionale dei Giovani (Fng) rappresenta attualmente circa 3 milioni di giovani appartenenti a 44 associazioni giovanili diverse, tra cui quelle d'ispirazione religiosa, come l'Azione Cattolica, i Giovani delle Acli, i Giovani Musulmani e l'Unione dei Giovani Ebrei; le associazioni giovanili di partito, dalla Sinistra Giovanile ad Azione Giovani, dall'Udc alla Margherita; i partiti virtuali, come Giovani europei; le rappresentanze sindacali (come la Fim-Cisl e la Fabi) e studentesche (Fuci e Studenti.net); le associazioni sportive (il Csi e la Uisp), educative e ricreative (Agesci ed Arci). La conferenza stampa sarà l'occasione per illustrare il percorso di formazione del Forum Nazionale dei Giovani, ma soprattutto le prospettive sociali e politiche che si potranno aprire con il Congresso, a livello nazionale ma anche europeo. Nel corso dell'incontro con la stampa, verranno altresì presentati in anteprima i dati dell'Istituto Iard sulla partecipazione e l'associazionismo giovanili (...)” Cfr "*I giovani s'allenano e chiedono una legge quadro*", in "*Avvenire*", 18. 12. 2004.

politiche giovanili. Il Forum, che ha come obiettivo principale quello di essere riconosciuto dal governo come parte sociale, vede iscritti circa tre milioni di ragazzi appartenenti a quarantaquattro associazioni giovanili diverse. Penso sia questo un evento particolare per il nostro tempo in cui si parla sempre più spesso di giovani disinteressati e completamente assenti nei dibattiti politici, ma forse troppo poco di quelli che vogliono fare, cioè essere protagonisti.

Queste considerazioni ci permettono di dare una prima risposta alla domanda iniziale da cui sono partita. Possiamo dire infatti che, evidentemente, non sono i valori e gli ideali a mancare poiché i giovani ne sono continuamente alla ricerca, ciò che manca è invece la capacità della politica di farsene realmente portavoce. E' questo ciò che la rende poco interessante agli occhi dei giovani e troppo distante dai loro reali interessi e desideri.

2. Cosa è oggi la Politica per gli adolescenti?

Come fare allora per far sì che i giovani di oggi ritrovino l'interesse per la politica e la motivazione a "sporcarsi le mani" come dice Bertolini⁶, cioè a diventare attori e protagonisti della vita politica in modo da dare ad essa nuovo senso e nuovi orientamenti?

Per raggiungere questo obiettivo occorre partire dal recuperare il significato originario del termine *politica* così come era inteso nella tradizione ellenica. Ci sono, infatti, nella concezione greca (soprattutto in quella platonica e aristotelica) aspetti di etica e di educazione che andrebbero ripresi oggi tenendo conto del mutato contesto storico, per dare nuovo vigore e valore al termine *politica*⁷.

Nella tradizione greca, infatti, il termine *politica* era strettamente legato a quello di *paideia*⁸. Vediamo come. *Paideia*, nel suo significato

⁶ Cfr P. Bertolini, „Introduzione al convegno”, in A. Erbetta (a cura di), *Senso della politica e fatica di pensare*, Bologna, CLUEB, 2003;

⁷ J. Dewey, *Democrazia e educazione*, trad. dall'inglese, La Nuova Italia, Firenze, 1954; Cfr M. Corsi R. Sani (a cura di), *L'educazione alla democrazia tra passato e presente*, Milano, Vita e pensiero, 2004;

⁷ Cfr M.C. Galli, *Manuale di storia del pensiero politico*, Bologna, il Mulino, 2001; M. D'Abbiero, *Eros e Democrazia*, Milano, Guerini Studio, 1998;

⁸ „...Paideia: termine greco che letteralmente significa educazione, formazione. La nozione di *paideia*, intesa come trasmissione di un sistema di conoscenze e di valori, rappresenta uno dei concetti centrali in base ai quali si è articolata, anche ideologicamente, l'immagine del mondo culturale greco ...” Cfr Le garzantine, *Enciclopedia di Filosofia*, Garzanti, Milano, 2004.

letterale ed originario significava "educazione" intesa come *tecnica con cui il fanciullo veniva preparato alla vita* e, nel suo significato più profondo, voleva dire educazione permanente, compito del cittadino e del politico, *precondizione di chiunque intendesse partecipare alla "custodia" civile, militare, culturale della propria vita*⁹. Il termine *paideia* poi, nel mondo ellenico è andato sempre più arricchendosi di significato fino ad esprimere *l'ideale della formazione umana* che si doveva realizzare attraverso la cultura, una cultura intesa come sviluppo dei più profondi valori umani. E' da tale concezione del termine *paideia* che è scaturito quello di *politica*, inteso come *massima espressione della pienezza umana* poiché stava a rappresentare l'opportunità dell'uomo di esprimere se stesso e dare senso alla propria esistenza partecipando alla vita della *polis* e diventando così cittadino a pieno titolo.

In tale concetto di *politica* erano pertanto insiti precetti quali la necessità dell' accrescimento della consapevolezza e delle responsabilità degli uomini di essere cittadini e cioè soggetti attivi della comunità di appartenenza, e la necessità che gli amministratori e i politici della *polis* fossero in grado di vegliare per garantire ai cittadini le opportunità e le norme atte a favorire il perseguimento di mete di vita, per sé e, contemporaneamente, per l'esercizio della cittadinanza. Come successivamente affermò Hanna Arendt¹⁰: "...nella vita pubblica della *polis* si decideva con la persuasione, con la parola, non con la forza e la violenza. Attraverso la politica si accedeva alla libertà perché non si era sottomessi, ci si poteva sentire se stessi, interagendo con gli altri per azioni e imprese liberamente scelte..." Tale concetto di *politica* era inoltre strettamente legato anche a quelli di *logos* e di *ethos*. *Logos* significava parola, scambio, relazione, comunicazione e condivisione di idee, pensieri, valori, progetti¹¹. Per Aristotele il linguaggio era lo strumento che permetteva di manifestare ciò che era utile e ciò che era dannoso, ciò che era giusto e ciò che era ingiusto¹². Ecco perché *politica* stava anche a significare *educazione alla parola*, perché attraverso la parola e il dialogo l'uomo era messo in condizione di scegliere liberamente un comportamento responsabile. *Ethos*, invece, in greco significava *comportamento, costume*.

⁹ Cfr P. Bertolini, *Educazione e Politica*, Milano, Raffaello Cortina Editore, 2003;

¹⁰ Cfr H. Arendt, *Vita Activa*, trad. da inglese, Milano Bompiani, 2000;

¹¹ Cfr Le garzantine, *Enciclopedia di Filosofia*, Milano, Garzanti, 2004;

¹² Cfr E. Berti, (a cura di), *Guida ad Aristotele*, Roma-Bari, Laterza, 2000;

Questo termine, introdotto nella filosofia greca da Aristotele, faceva riferimento a quella parte della filosofia che studiava la condotta dell'uomo, i valori che la orientano e i criteri in base ai quali valutare scelte e comportamenti. Per i greci era l'*ethos* a caratterizzare l'uomo poiché gli permetteva di rispondere di se stesso e di rendersi responsabile di sé e delle proprie azioni¹³, e la *paideia* costituiva quel processo di crescita personale che permetteva di sviluppare correttamente l'*ethos*.

Oggi il significato originario di *politica*, così ricco come si presentava nella tradizione greca, è andato perduto quasi completamente. Nelle democrazie odierne il significato greco della *paideia* sembra si sia sempre più modificato nel primato di una ragione tecnica e procedurale che non permette di condividere idee e significati, cioè di alimentare la relazione intersoggettiva (*logos*) e di realizzare un *ethos* comune.

Come fare allora per recuperare, nella politica di oggi, il senso profondo della *paideia*? *Quali vie esistono o sono ipotizzabili per stimolare la partecipazione di tutti alla vita politica, sociale e culturale? Come si può promuovere l'impegno per i diritti umani, la libertà, il pluralismo e lo Stato di diritto?*

3. Può esistere una *pedagogia politica* ?

Anche oggi, come in passato, l'educazione e la cultura giocano un ruolo fondamentale non soltanto per lo sviluppo dell'uomo e della sua personalità ma anche per la piena realizzazione della sua identità di uomo e di cittadino. E' proprio nella *ricerca di paradigmi alternativi riguardanti l'educazione e la cultura* che la pedagogia deve intervenire dal momento che i processi educativi, che ne costituiscono l'oggetto, sono per loro natura caratterizzati da un'attenzione complessiva per l'essere umano e sono dunque i primi ad essere chiamati in causa se si vuole promuovere la partecipazione attiva e creativa di ogni persona all'avventura culturale e umana, dunque politica, della società cui appartiene.

Compito della pedagogia, pertanto, è quello di sviluppare *percorsi di educazione al pensiero critico* che mettano ogni persona in condizione di costruire la propria identità personale attraverso la relazione, la comunicazione, la condivisione, facendo leva sul sentimento di appartenenza e sulla consapevolezza di essere parte costitutiva e fondante della vita della società cui si appartiene.

¹³ Cfr D. Demetrio, E. Mancino, *Educare a pensare nella adolescenza*, in *Encyclopaideia* n.8, Bologna, CLUEB, 2000;

L'educazione cioè oggi deve farsi *pratica di libertà*, deve promuovere uno spirito di problematizzazione che porti adulti e giovani a porsi domande di convivenza sociale sempre diverse, a cercare soluzioni sempre innovative ed efficaci e ad impegnarsi per renderle concretamente realizzabili. Come pedagogisti bisogna sempre credere nel cambiamento e impegnarsi affinché i giovani facciano lo stesso.¹⁴

Quali allora i percorsi educativi da adottare per sostenere efficacemente i giovani in questa ricerca di nuovi orizzonti di senso e per motivarli a rendersi protagonisti attivi della vita politica della propria società?

Il punto di partenza dal quale muoversi è *l'educazione alla legalità* intesa come riflessione sul significato e sulla funzione del *diritto* quale *insieme di norme che regolano la convivenza sociale*. Obiettivo di questo intervento educativo deve essere quello di sviluppare la consapevolezza che regole, norme e leggi, sono opportunità e strumenti che consentono ad ogni cittadino di esercitare ed usufruire pienamente della propria libertà nel rispetto della libertà altrui e non sono invece obblighi e doveri da subire in modo passivo e acritico. Esse infatti, da un lato garantiscono la tutela dei diritti di ogni singolo cittadino, dall'altro delimitano spazi di autonomia e di libertà individuale che, se ben utilizzati, permettono a ciascuno di trovare il proprio spazio nella società e di costituirne parte attiva attraverso l'impegno politico¹⁵.

L'educazione alla legalità, entrata a pieno titolo nel dibattito pedagogico, ha per oggetto la natura e la funzione delle regole della vita sociale, i valori della democrazia, l'esercizio dei diritti di cittadinanza, il rispetto dei diritti umani. Educare alla legalità significa elaborare e diffondere la cultura dei valori civili, acquisire una consapevolezza più profonda dei diritti di cittadinanza, partendo dalla consapevolezza della pari dignità di tutti gli uomini. Educare alla legalità significa aiutare i giovani a comprendere come l'organizzazione della vita personale e sociale si fondi su un sistema di relazioni giuridiche, a sviluppare la consapevolezza che valori quali dignità, libertà, solidarietà, sicurezza non devono considerarsi come acquisite per sempre, ma vanno perseguite, volute e, una volta conquistate, protette.

¹⁴ Cfr D. Demetrio, „Pedagogia e politica. Tempo privato e tempo pubblico”, in Antonio Erbetta (a cura di), *Senso della politica e fatica di pensare*, Bologna, CLUEB, 2003;

¹⁵ Cfr G. Boselli, *Dar luogo al formarsi su idee e valori. Saggio breve sulla convivenza civile*, in „Encyclopaideia” n.17, Bologna, CLUEB, 2005.

Educare alla legalità vuol dire in primo luogo praticarla: le regole non devono essere presentate come puri comportamenti obbligatori ma devono essere vissute con consapevolezza e partecipazione. In tal senso educare alla legalità, oltre ad essere una premessa culturale indispensabile, si deve porre come sostegno operativo quotidiano, perché solo una efficace azione educativa su tali argomenti può modificare radicalmente le coscienze e la cultura dei giovani, e incidere sull'incalzante dilagare del fenomeno criminale (bullismo, dipendenze, etc..), che ultimamente, tra i giovani va dilagando proprio a casa della perdita del senso di responsabilità civile. Per recuperare e per affermare il valore della *cultura della legalità*, la pedagogia, pertanto, deve partire dal promuovere il *concetto di cittadinanza* sviluppando una profonda riflessione sui principi fondamentali in democrazia quali, "*diritto*" e "*dovere*", intesi come necessità di esercitare la propria libertà nel rispetto della libertà degli altri, delle regole e delle norme sociali. L'educazione alla legalità deve tendere a facilitare la piena realizzazione di una *cittadinanza democratica* stimolando la partecipazione responsabile di ogni soggetto alla vita sociale, sviluppando la concezione del diritto come espressione del patto sociale e valorizzando la nozione di *interesse comune*. Questo è necessario dal momento che buona parte dei problemi che minacciano oggi la convivenza pacifica all'interno della società, sono attribuibili non solo a fattori economici, naturali, storici, ma anche a interventi nella sfera pubblica che trascurano l'interesse della collettività per privilegiare interessi particolari. Il principio di legalità in democrazia rappresenta, pertanto, un mezzo di prevenzione a questi rischi.

4. Conclusioni

A partire da queste riflessioni appare chiaro che il primo passo per risvegliare l'interesse dei giovani alla vita politica deve essere quello di rifondare il rapporto tra istituzioni pubbliche e associazioni volontarie che dovrebbero essere capaci di darsi mutuo sostegno su alcuni valori di fondo, senza rinunciare alla reciproca autonomia. Questo invece purtroppo non accade quasi mai dal momento che le associazioni quasi sempre si rivolgono alle istituzioni di governo locale solo per trovare risorse e, viceversa, le istituzioni pubbliche considerano, impropriamente, il volontariato uno strumento per risolvere i propri problemi di bilancio

derivanti dai drastici tagli ai trasferimenti¹⁶. Sarebbe auspicabile, invece, una crescita di azioni concertate tra istituzioni come la scuola, gli enti locali, le università, le imprese, la stampa e le radio locali da un lato, e gruppi e movimenti attivi nel territorio, dall'altro, in modo da attivare il potenziale di morale civica e da veicolare la propensione dei giovani alla mobilitazione verso obiettivi funzionali allo sviluppo delle comunità, del territorio e di tutta la società. I giovani infatti vogliono emergere, vogliono far sentire la loro voce ma si scontrano costantemente con la mancata attivazione da parte delle istituzioni di canali efficaci e validi di comunicazione.

Oggi per diventare cittadini di un mondo che vuole riconoscersi in valori comuni - pace, diritti umani, sviluppo, ambiente - e promuovere un'osmosi tra crescita economica, sviluppo democratico e rispetto della persona umana è necessario realizzare forme di produzione culturale ed educativa non solo individuale ma collettiva¹⁷. La cultura che si fonda sui diritti umani è infatti una cultura pervasiva, che libera e apre, che considera la scuola, l'università, il mondo dell'informazione e quello dei poteri locali, regionali e nazionali come un cantiere, un laboratorio di costruzione della nuova cittadinanza democratica che pervade l'intero arco della vita della persona¹⁸.

E' necessario allora che insieme alle nuove generazioni, a partire dalla scuola di base, sia ricostruito il lessico della democrazia, non solo recuperando i significati delle sue parole fondanti (*democrazia, libertà, uguaglianza, costituzione*) ma stabilendo una connessione con ciò che esse vogliono dire nella vita di ciascuno e della collettività in termini di pratiche (riprendendo l'idea *deweyana* della scuola come luogo di vita democratica).

L'insegnante, co-costruttore di saperi, è anche regista di una piccola vita sociale dell'alunno che nella scuola si costruisce come momento di prova e di iniziazione a quella che più tardi sarà la partecipazione alla più vita della società. Solo una scuola che non dimentica l'etica pubblica è davvero pubblica.

Per evitare che la parola politica si cristallizzi, si solidifichi e diventi priva significato, è importante allora recuperare il suo significato

¹⁶ Cfr A. Muschitiello, *Competenze e capabilities. Come cambia la formazione*, Bari, Progedit, 2012;

¹⁷ Cfr Z. Baumann, *La solitudine del cittadino globale*, trad it Feltrinelli, Milano, 2000;

¹⁸ Cfr E. Morin, *I sette saperi della educazione del futuro*, Milano, Cortina, 2001;

originario e il forte legame che tale concetto ha con quello di educazione per porre le basi di un rinnovamento intellettuale che stimoli la motivazione dei giovani ad approcciarsi in modo nuovo, attivo, operativo e costruttivo, nella vita della propria società. E' nell'educazione oggi, nel rapporto fra i professori e gli studenti, nell'organizzazione della scuola, e anche nel mondo dell'informatica e in quello dell'informazione, che va stimolata come non mai, guardando al futuro, la capacità di coltivare il pensiero libero, di pensare, di rinnovare il sapere, di rivederlo, di ricrearlo. Questo è necessario se si vuole davvero riuscire a portare i giovani a guardare in positivo verso il futuro motivandoli a diventare protagonisti attivi del proprio mondo.

Bisogna allora impostare in modo nuovo e in prospettiva pedagogica il processo di formazione dei ragazzi di oggi.

E' necessario partire tenendo conto del mutato contesto storico. Oggi i rapporti sociali sono "tirati fuori" da contesti locali di interazione e riallacciati su archi spazio-tempo lontani e indefiniti e le relazioni sociali sono sempre più spesso stabilite a grandi distanze.

Se si vuole allora permettere davvero ai giovani di sviluppare quel senso di appartenenza necessario alla costruzione della loro identità e di appropriarsi della propria vita, è necessario impostare azioni educative capaci di adattare i saperi globali e internazionali alle caratteristiche e alle necessità locali di spazio e tempo.

E' necessario affiancare al processo di globalizzazione, che porta con sé il cosiddetto fenomeno del *disembedding* (senso di insicurezza) uno, complementare di regionalizzazione.

Bisogna far sì che la rapidità con cui variano le relazioni sociali le situazioni con cui ogni giorno ci si trova a doversi confrontare, sia compensata dalla rivitalizzazione di identità tradizionali e locali. Bisogna, infatti, fornire ai giovani punti di riferimento stabili e raggiungibili con cui entrare facilmente in relazione e che permettano loro di acquisire un ruolo nella comunità, bisogna abituarli ad assumere responsabilità e a far valere i propri diritti stimolandoli così alla partecipazione attiva.

L'intervento della pedagogia deve essere in questo momento capace di conciliare la deterritorializzazione esito della globalizzazione che ha portato a proiettare progetti, aspirazioni, costruzioni sociali verso il globale, con le esigenze delle singole collettività e comunità. Essa pertanto, dal punto di vista globale, deve aprirsi alla sfida della formazione di un cittadino globale, nel confronto tra culture e civiltà, mentre, dal punto di vista locale, deve pensare a pratiche educative che

restituiscano ai luoghi la loro capacità di produrre senso per l'esistenza, rivalutando la dimensione della *communitas* e ancorandosi ai territori come spazi vissuti di organizzazione delle identità, dei saperi, delle relazioni, delle comunicazioni, delle visioni del mondo.

E' evidente quindi quanto sia necessario che la scuola esca da un' autoreferenzialità rispetto al mondo sociale e che i quartieri e le piazze delle grandi città tornino ad essere vissuti, recuperando il senso degli spazi in cui si parla, si discute, si gioca, si festeggia. La pedagogia, in conclusione, deve educare coscienze che siano individuali e allo stesso tempo collettive, private ma allo stesso tempo pubbliche. Essa deve fare rientrare nei progetti educativi e nei programmi, esperienze di partecipazione, di collaborazione e di assunzione di incarichi e di responsabilità, con l'obiettivo di promuovere la massima realizzazione dell'individuo, delle proprie possibilità personali e di rendendolo così attore di cambiamento all'interno dall'organizzazione sociale. Per far questo è necessario ripartire dalla scuola quale "luogo di cittadinanza democratica".

L'organizzazione stessa della scuola, prefigurata dalla legge sulla autonomia favorisce la responsabilizzazione e la partecipazione degli studenti alla vita scolastica, l'ascolto delle loro proposte, la creazione di spazi adeguati alla crescita democratica e all'esercizio attivo di diritti e responsabilità, la promozione di una cultura del dibattito e della negoziazione e la legittimazione di punti di vista diversi.

Per la politica, di contro, si tratta di accettare la presenza di individui scomodi perché educati alla partecipazione e alla gestione del bene comune. Tutto ciò pone in primo piano l'esigenza da parte appunto della classe politica di avvicinarsi ai giovani colmando la distanza fra le istituzioni e il loro mondo. Essi potrebbero ad esempio provare ad essere più presenti nelle scuole, in modo tale che gli studenti recuperino fiducia nella politica attraverso la conoscenza, la partecipazione e il buon esempio.

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AMERICAN EXPERIENCE OF PREPARING FUTURE FACULTY

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Abstract: *The article is devoted to the issue of preparing faculty in the United States. The purpose of the article is to research experience of preparing faculty in the United States, beginning with training in magistracy and ending with self-education. The author argues the importance of all stages of that process – from studying at Graduate School to self-education. The analysis of trends in the field of training and professional development of faculty is made. The changes in the paradigm of preparing faculty in higher education are considered.*

Keywords: *preparing faculty, higher education reform, improving the quality of education, professional development.*

Introduction

The effectiveness of training specialists with higher education for various branches of industry depends on the competence of faculty members who provide educational process at high school. New priorities in education led to an objective need for special training of faculty for work at universities.

Increasing interest to the problem of preparing faculty is observed in many countries, including the United States.

The analysis of the scientific literature

To study the American experience of preparing future faculty we studied scientific works of foreign experts in this field (F. Bobbit, N. Evans, W. Charters, R. Tyler, M. Johnson, D. Dundershtadt, W. Herrick, H. Tab, F. Phoenix, R. Zeys, J. Peliken).

Studying literature gives the reason to assert that this issue had gained urgency in the 90th years of the twentieth century, when a public information environment came into being. Increasing interest to preparing

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future **faculty**, establishment of appropriate bodies and programs have been observed in almost all countries simultaneously, including the United States.

In the early 90th years of the twentieth century in the USA, as in other developed countries, the problem of changes in paradigm of **preparing** future **faculty**, new training programs and accreditation of scientific and pedagogical staff, establishing institutions dealing with personnel problems of high school arised. Thus, the study of scientific sources provided an opportunity to reveal the basic tendencies of reforming the system of **preparing** future **faculty** in the USA, exactly:

- 1) directing the preparation of **faculty** to all activities, not only to science;
- 2) aspiration to develop specialty "teacher of high school" as a separate profession;
- 3) introducing accreditation schemes for higher education sector and the elaboration of standards for professional development of **faculty**;
- 4) creation and activation of institutions and organizations involved in the training and development of **faculty**;
- 5) raising the status of teaching at high school to the research level and remuneration of teachers for teaching;
- 6) the development of programs and models of training and professional development of teachers, representing a new approach to solving the problem;
- 7) attraction of all members of the teaching staff to continuous professional development in the context of the concept of lifelong learning;
- 8) recognition of the quality of teaching one of the main tasks of higher education;
- 9) transition to a new paradigm of training doctors to work as a presentation of higher education¹.

The purpose of the article is to research experience of **preparing faculty** in the United States, beginning with training in magistracy and ending with self-education.

¹ Belmaz, Ya. M., *Profesiina pidhotovka vykladachiv vyshchoi shkoly u Velykii Brytanii ta SSHA: monohrafiia*, Horlivka, 2010, p.304.

Forms of preparing faculty

The main forms of **preparing** future **faculty** in the USA are magistracy and postgraduate studies.

Study of American Master's programs gives grounds to highlight their special features:

- 1) program consists of compulsory and optional subjects;
- 2) main topics that cover curriculum concerns the following issues: the role of a high school teacher, the foundations of the learning process of students, evaluation of knowledge and skills of students, techniques, methods and forms of teaching at high school, philosophy of teaching;
- 3) almost all programs include courses dedicated to the prevention of plagiarism in academic activities;
- 4) one of the main methods of evaluation is undergraduates portfolio;
- 5) focuses on reflection or introspection;
- 6) a number of approaches and teaching methods, of which the main is personality-oriented learning, interactive technology, project method, problem method are used in the study;
- 7) defence of a thesis is obligatory².

The American higher education system is in three stages: the first stage is completed Bachelor's degree, the second – Master's degree, and the third – Ph.D., called the Latin term Philosophia Doctore (PhD).

Studying for a Bachelor's degree is the basic higher education, it is in a college. Normally, it takes four years or 8-12 semesters, depending on the number of credits (required courses) required to obtain a Bachelor's degree from a particular discipline. Most students graduate from universities obtaining this degree. Only about 15-20% of students continue their education to get a Master's degree and only 5-7% of them enter postgraduate study, after which they are awarded a degree of PhD, or doctorate. To get a doctorate (PhD) a student must study three years.

Education doctoral programs in the USA can be implemented at different levels and in different forms: departmental level (lectures, forums, debates, courses, seminars, support for doctoral, student practice teaching, guide research activities of students), the university and partner level (seminars, certified program, drawing portfolio, training for mentors).

² Belmaz, Ya. M., *Profesiina pidhotovka vykladachiv vyshchoi shkoly u Velykii Brytanii ta SShA: monohrafiia*, Horlivka, 2010, p.304.

To avoid misunderstandings, we note that in the USA, unlike some European countries, there is only one scientific degree – Doctor. In fact, it corresponds to degree of candidates and it is awarded after postgraduate school and submission of a thesis. The procedure of defence of a thesis is fundamentally different from that had been adopted in Ukraine. It is more like our defense of diploma or semester paper and going before the commission, which consists of four people, supervisor and three other professors of the department. External reviews of work are not required. However, the results obtained in the thesis, as a rule, must be published in scientific articles and tested in speeches at scientific conferences.

Historically, that career high school teacher USA scientific work has long been the main focus of activities, rather than actually teaching. Academic recognition, financial rewards, progression in their careers are not primarily dependent on the quality of teaching, but on scientific achievements. Over time, American educators have recognized the need for change in the paradigm of training future teachers of universities. American researcher J. Peliken mentions, that obviously it would be logical that the area of research and teaching develop in parallel in the same establishments, and the same people³.

1996 National Research Council (US) recommended to recognize that the integration of research and education is the national interest, it should be a national goal⁴.

Trends in the field of preparing faculty

Changes in **preparing faculty** caused reform of higher education, which began in the 80th years and continued in the 90th years of last century. In the 80th years a number of legislative changes were introduced in the USA higher education system. Most discussions have caused problems with the distribution and expenditure of the budget and off-budget financing of higher education, efficient spending of finances for training specialists in accordance with the needs of the domestic labor market. Education quality problems had not been discussed. Politicians and lawmakers have provided higher education institutions the right to decide issues of standards, quality, content and teaching methods for higher education⁵.

³ Romanovskyi, O.O., *Khronika vyshchoi osvity SShA (na prykladi diialnosti derzhavnykh i nederzhavnykh zakladiv)*, K.: NPU im. M. P. Drahomanova, 1997, p.78.

⁴ National Science Board. *Science and indicators*. Washington, D C: National Science Foundation, (1996).

⁵ Peliken, J., *The idea of the university: A re-examination*, New Haven: Yale University Press, 1992.

New social needs, economic relations and use of modern technologies have led to significant changes in the higher education sector. Thus, in the early 90th years of the last century in many developed countries, including the United States, the first step to global knowledge and "scientific" industry was done, when significant role started to play the techniques and principles of intensification of knowledge in particular, such as telecommunications, information technology and so on the activity of higher traditional academic institutions. The students of 'information age' require changes in teaching methods, preferring interactive learning in cooperation. And, as noted by J. Duderstadt, now there are new forms of learning: asynchronous learning (learning anytime and anywhere). Thus, the aim of society of continuing education is that people would be constantly involved in learning and obtaining knowledge⁶. However, despite the emergence of new educational technologies, learning, academic major source is the university faculty. Academic quality of students' knowledge depends largely from these people. So in the early 90th years of the last century, it has acquired urgency of the issue of change in the paradigm of **ppreparing future faculty**, new training programs and accreditation of scientific and teaching staff, the establishment of institutions that train personnel for high school⁷.

At the same time, a new training program for future faculty entitled "Preparing Future Faculty" (PFF) was introduced in the USA⁸. The main purpose of this program is improving the quality of education based on developing a new generation of faculty members.

The Preparing Future Faculty (PFF) program is a national movement to transform the way aspiring faculty members are prepared for their careers. PFF programs provide doctoral students, as well as some master's and postdoctoral students, with opportunities to observe and experience faculty responsibilities at a variety of academic institutions with varying missions, diverse student bodies, and different expectations for faculty.

PFF is sponsored by the Council of Graduate Schools (CGS) and the Association of American Colleges and Universities (AAC & U). Since its inception in 1993, the PFF initiative has been implemented in more than 45

⁶ Duderstadt, J.J., *Preparing future faculty for future universities*, Liberal Education, V. 87, 2001, pp. 24 -30.

⁷ The Preparing Future Faculty Program. Brochure, (2004), [El. resource]. - [//www.preparing_faculty.org/Brochure.pdf](http://www.preparing_faculty.org/Brochure.pdf).

⁸ The Preparing Future Faculty Program. Brochure, (2004), [El. resource]. - [//www.preparing_faculty.org/Brochure.pdf](http://www.preparing_faculty.org/Brochure.pdf).

doctoral degree-granting institutions and 300 partner institutions in the United States.

This program aims at improving preparing faculty members in research universities of those students who have achieved some success in research. It was designed, first, to develop alternative models of faculty preparation (1993-1997) and then to institutionalize them (1997-2001).

The first phase of the program began in the summer of 1994. Founded on the principles of partnership and cooperation, PFF is aimed at improving university functions corresponding to the three main types of faculty member of university: research, teaching and social work (social work is useful work performed by the university for the community).

The second phase began in 1997; the focus in this course was designed to help the PFF to move from the status of demonstration projects to national model of higher education.

A third phase (1998-2001) was launched to develop model programs in science and mathematics departments in collaboration with the American Association of Physics Teachers, the American Chemical Society, the American Mathematical Society and the Mathematical Association of America, and the Special Interest Group on Computer Science Education/ACM.

In November 1999, another phase of PFF was initiated to develop model programs in social sciences and humanities departments in collaboration with the American Historical Association, the American Political Science Association, the American Psychological Association, the American Sociological Association, the National Communication Association, and the National Council of Teachers of English.

Currently an independent assessment of the impact of PFF programs on the success of faculty members in their early careers is being conducted.

The Preparing Future Faculty (PFF) program is both a configuration of ideas and a national program involving 43 doctoral degree-granting institutions and more than 250 "partner" institutions. Built in the spirit of partnership and cooperation, PFF programs transform the way doctoral programs prepare aspiring faculty members for their careers, moving toward an education that is informed by the kinds of responsibilities faculty members actually have in a variety of institutional types. PFF's focus is on the full range of faculty roles and responsibilities subsumed by the terms teaching, research, and service. PFF program provides doctoral students with opportunities to observe and experience faculty

responsibilities at a variety of academic institutions with varying missions, diverse student bodies, and different expectations for faculty

The national PFF programs have three core features.

1. The most essential feature is the cluster: an anchor, doctoral degree-granting institution or department collaborating with various partner institutions or departments. The cluster is guided by a steering committee that determines what is needed in future faculty and the direction of the PFF program. The committee includes representatives from each partner institution, and these representatives must have equal voice in leadership of the program.

2. The PFF program must address the full scope of faculty roles and responsibilities included in teaching, research, and service, emphasizing how the expectations for these responsibilities are often quite different in different campus settings.

3. Participating doctoral students should have multiple mentors and receive reflective feedback not only for their research activities, but also for their teaching and service activities.

Since 1993, many institutions and departments have developed their own versions of PFF. These programs incorporate many, if not all, of the essential elements of PFF programs described above. For example, many of the institutions with programs similar to PFF are providing a course on college teaching, a series of seminars that address different aspects of faculty life, and visits to different colleges and universities.

Conclusions

Thus, even a brief analysis of training **faculty** in the United States makes it possible to do the same conclusions:

- universities initially did not include training in teaching professions of **faculty** in the USA;

- issues such as the implementation of teaching responsibilities, professional competence of the faculty have become more relevant than ever before in many developed countries, including the United States, 90th years of the twentieth century, which in turn led to the creation unique institutions and training programs and professional development university teachers;

- the main forms of **faculty** training institutions are post-graduate (or similar form) and the system of postgraduate education. However, in

the training of faculty certain changes of forms of pedagogical competence have been recorded.

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INSTRUIRE ET ÉDUIQUER LE GRAND PUBLIC. LES DÉBUTS DE LA PRESSE ILLUSTRÉE EN FRANCE

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Abstract: *The year 1833 marks in France the beginning of the illustrated press meant for the general public. In February that year Le Magasin pittoresque came out and so did Le Musée des familles in October, the best-known representatives of a trend that included many other initiatives. The pattern is an English one: The Penny Magazine, coming out the previous year, but not as long-lived as Le Magasin pittoresque and Le Musée des familles. This article aims to render the characteristics of the first illustrated publications in Paris, especially the way their content synchronized with the cultural background of the society they addressed to.*

Keywords: *illustrated press, July Monarchy, education.*

Le terme de «magasin» fut pour la première fois utilisé en France dans le monde de la presse lors de la parution en 1792 du *Magasin encyclopédique ou Journal des sciences, des lettres et des arts*, publié par Millin. Le mot était emprunté à l'anglais, cette reprise représentant en fait un retour: à l'origine, c'était l'Angleterre qui avait naturalisé ce mot français et, en élargissant le sens, l'avait appliqué à des recueils périodiques qui «emmagasinaient» les matières les plus diverses. La formule adoptée par le *Magasin encyclopédique* pourrait se résumer ainsi: des connaissances variées, dépourvues d'éléments iconographiques, qui s'adressaient, en raison du prix élevé de la publication, seulement à un public fortuné. L'entreprise de Millin ne réussit pas à imposer le titre de «magasin» sur le marché de la presse française, celui-ci y étant vite abandonné.

Mais le terme fut de nouveau mis au goût du jour sous la monarchie de Juillet: en février 1833, à l'initiative de l'imprimeur Alexandre Lachevardière parut à Paris le *Magasin pittoresque*. C'est ce moment-là qui marque en France le véritable avènement des magazines. En effet,

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publication bon marché de facture grand public, enregistrant une diffusion record, ce *Magasin pittoresque*, richement orné de gravures, fut, dans son genre, un produit pionnier dans l'univers des périodiques français de l'époque.

Dans son sillage, d'autres magazines illustrés virent le jour. Parmi ceux-ci: le *Musée des familles* sous-titré *Lectures du soir*, lancé en octobre 1833 par Emile de Girardin. Aux côtés du *Magasin pittoresque*, le *Musée des familles* bénéficia longtemps de la faveur du public. Dans la préface de ses *Tables des dix premières années*, ce dernier note d'ailleurs qu'il «a vu s'éteindre, sur son chemin, une foule de publications qui aspiraient à devenir ses rivales», qu'«il a survécu à des revues célèbres », qu'«enfin, dans sa spécialité, il est resté seul debout avec le *Magasin pittoresque*». Le même texte consigne aussi les auspices favorables dont ces recueils auront alors joui: «tout annonce que ces frères jumeaux continueront longtemps encore leur glorieuse carrière»¹. Et la plume qui écrivit ceci ne se sera pas trompée, car tous les deux ouvrages bénéficièrent d'une longévité inhabituelle: le *Musée des familles* parut jusqu'en 1900, tandis que le *Magasin pittoresque* continua son aventure au-delà même des confins du siècle.

Dans les lignes qui suivent, nous nous intéresserons à ces deux publications en tant que chefs de file de la presse illustrée paraissant en France pendant la première moitié du XIX^e siècle. Car cette étape marque un véritable tournant: le public qui lit la presse s'élargit et se diversifie considérablement à l'époque, les produits médiatiques commençant à innover le corps social et à influencer sur les représentations collectives. Par ailleurs, ces premiers magazines grand public témoignent également de l'émergence, au moment de leur parution, de deux tendances fondamentales qui s'épanouiront tout au long du XIX^e siècle: la démocratisation du savoir et l'engouement pour l'illustration.

La naissance de la presse illustrée en France est redevable à un modèle anglais: *The Penny Magazine*, lancé à Londres en mars 1832. Celui-ci enregistra un succès retentissant mais il ne jouira pas de la longévité impressionnante du *Magasin pittoresque* ou du *Musée des familles*. Il vit le jour à l'initiative de la Society for the Development of Usefull Knowledge, dont faisaient partie plusieurs personnalités et qui se proposait, entre autres, de diffuser des ouvrages de vulgarisation afin de contribuer au progrès de l'instruction. Dans la déclaration d'intention du *Penny Magazine*, ses rédacteurs notaient: «What the stage-coache has become to

¹ *Tables du Musée des familles (première série)*. Tomes 1 à 10. – Années 1834 à 1843, 1849.

the middle classes, we hope our *Penny Magazine* will be to *all* classes – a universal convenience and enjoyment.» Le périodique anglais recourait en outre à un procédé typographique nouveau à l'époque, la gravure sur bois debout. Cette technique rendait possible une utilisation massive de l'illustration et réduisait à la fois le coût de fabrication des recueils, ce qui permit aux rédacteurs d'atteindre leur cible: mettre des contenus instructifs à la portée de toutes les classes de la société. Le prix bas transforma en produit populaire ce qui auparavant aurait passé pour un article de luxe.

MAGASIN PITTORESQUE

1^{re} ANNÉE. — 1833.

A TOUT LE MONDE.

C'est un vrai Magasin que nous nous sommes proposé d'ouvrir à toutes les curiosités, à toutes les heures. Nous voulons qu'on y trouve des objets de toute valeur, de tout choix : choses anciennes, choses modernes, animées, inanimées, monumentales, naturelles, civilisées, sauvages, appartenant à la terre, à la mer, au ciel, à tous les temps, venant de tous les pays, de l'Indostan et de la Chine, aussi bien que de l'Islande, de la Laponie, de Tombouctou, de Rome ou de Paris; nous voulons, en un mot, initier dans nos gravures, derrière dans nos articles tout ce qui mérite de fixer l'attention et les regards, tout ce qui offre un sujet intéressant de rêverie, de conversation, ou d'étude.

Lorsqu'on vit apparaître, il y a quelques années, dans Paris, ces longues voitures à huit et dix fenêtres, diligences des rues, s'arrêtant patiemment de minute en minute, pour laisser monter et descendre à loisir hommes et femmes, ouvriers et bourgeois, grands et petits, moyennant quelques gros sous, on se récria, et l'on trouva d'abord l'invention bizarre, d'un usage trop commun, et presque ridicule pour cette raison même que l'accès était à vil prix. D'ailleurs, disait-on, il n'y avait déjà que trop de moyens de transport sur la place. Mais, malgré ces critiques, tous ceux dont le pied fatiguait depuis long-temps les pieds, et qui avaient trouvé jusque là fort coûteux de se faire rouler en carrosse, se sont montrés moins scrupuleux. Le vil prix ne les a pas effrayés; les moyens de transport ne leur ont point paru trop nombreux. Ils ont estimé que l'invention était agréable et utile, et l'invention a réussi. De plus riches qu'eux ont à la fin partagé leur opinion. Maintenant on ne s'étonne plus de voir toutes ces machines à trois et quatre roues traverser la ville en tous sens, et s'avancer de loin, de conserver et en bonne intelligence, au milieu des tilburys, des landaux, des fiacres, et des cabriolets.

De même, notre Magasin à deux sous, dans un ordre d'entreprise bien différent, se recommande à tout le monde; mais il est plus particulièrement destiné à tous ceux qui ne peuvent consacrer qu'une humble somme à leurs menus-plaisirs.

Notre grande ambition sera d'intéresser, de distraire: nous laisserons l'instruction venir à la suite sans la violenter, et nous ne craignons pas que jamais elle reste bien loin en arrière; elle évitera seulement de revêtir les formes arrêtées, sévères, de l'enseignement spécial et méthodique, et son influence s'exercera à la manière de cette éducation générale que les classes de la société riches en loisirs doivent à des relations habituelles avec les hommes distingués, à des lectures variées, choisies, et aux souvenirs des voyages.

Ces relations, ces lectures, ces voyages, interdits au grand nombre, notre recueil aura pour lui constant de chercher à en tenir lieu. Nous aurons bien du malheur si, devant ce tableau toujours changeant du monde entier, que nous déroulerons continuellement sous les yeux de nos lecteurs, ils ont des pensées, des désirs que nous ne puissions satisfaire. A toute question nous espérons avoir une réponse prête, en nous tenant attentivement à la hauteur des connaissances, des découvertes, des productions des beaux-arts, en appelant tour à tour nos artistes, nos écrivains, à représenter, à dire ce qui est vrai, ce qui est beau, ce qui est utile, sans mélange d'exagération ou d'imaginations menagères. Ces promesses faites, résolus à les tenir avec con-

Tous L.

science, nous n'aurons garde de faire subir de longs programmes et de dévoiler ce qui doit rester notre secret, c'est-à-dire les difficultés que nous avons à vaincre, nos labeurs, nos veilles; à nous seuls la peine que nous tâcherons de rendre fructueuse, au public tout ce que l'œuvre pourra donner de plaisir utile à l'esprit et au regard.

MONUMENTS.

On rencontrera, épars dans la suite de nos livraisons, les plus remarquables des monuments anciens, des monuments du moyen âge, des monuments modernes. Les gravures en reproduiront fidèlement le caractère, l'effet d'ensemble, et très souvent les détails; les articles exposeront leur origine, leur usage, leurs diverses transformations, les événements historiques dont ils auront été le théâtre ou les mets spectateurs, et tout ce que leur aspect pourra évoquer de souvenirs.

FONTAINE DES INNOCENS.

RECONSTRUCTION DE LA FONTAINE DES INNOCENS. — LE CIMETIÈRE. — LE PASSAGE DES CHARNIERS. — L'ÉGLISE ET LES RECLUSES. — TRANSLATION D'OSSEMENTS AUX CATACOMBES.



(Fontaine des Innocents.)

Cette fontaine n'avait autrefois que trois côtés, et était adossée à l'angle de la rue Saint-Jenis et de la rue aux Fers. Sa première construction datait du XIII^e siècle; en 1339 elle fut réparée: les travaux d'architecture en furent alors confiés à Pierre Lesaut, abbé de Clagny, et les sculptures à notre célèbre Jean Goujon, tué le jour de la Saint-Barthélemy.

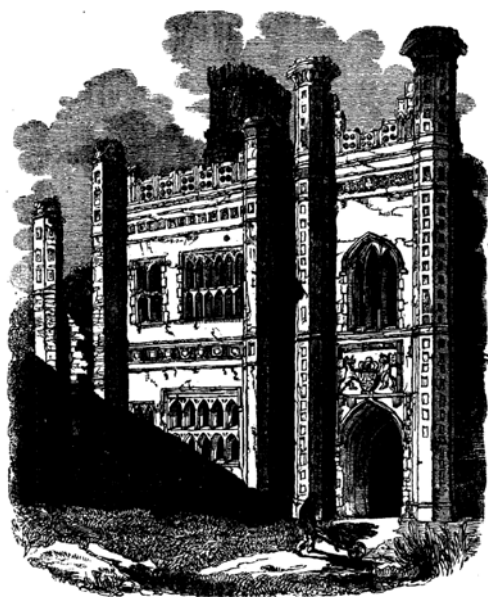
Dans le mois de mars 1788, sur la proposition d'un ingénieur nommé Six, toutes les parties de ce monument dignes d'être conservées furent transportées au milieu du marcadet des Innocents, qu'on commençait à établir, et la fontaine fut réédifiée d'après un plan nouveau. Comme il fallait l'agrandir et lui donner quatre faces pour pouvoir l'isoler au centre d'une place carrée, on fut obligé de compléter l'architecture. Jean Goujon avait sculpté cinq statues, on eut soin de les laisser entre les pilastres des arcades, on les arri-

Le premier numéro du *Magasin pittoresque*, février 1833

Les publications françaises qui puisèrent au *Penny Magazine*, reprirent tant sa structure, à savoir l'enchevêtrement de l'écrit et de l'iconographique, que son idéologie, notamment objectif de mettre à la portée d'un large public des connaissances riches et diverses. Le *Magasin pittoresque* explicite ainsi sa visée générale:

«Notre grande ambition sera d'intéresser, de distraire: nous laisserons l'instruction venir à la suite sans la violenter, et nous ne craignons pas que jamais elle reste bien loin en arrière»². De même, dans la déclaration d'intention du *Musée des familles*, intitulée «Les magasins anglais» - texte qui montre, en plus d'une ligne éditoriale, à la fois une dette envers les

MUSÉE DES FAMILLES.



LES MAGASINS ANGLAIS.

De tout ce qu'il y a de mieux.
On parlera de tout et de plusieurs choses encore.

Déjà nous pouvons réaliser pour la France un cours d'instruction familière, amusante, variée, à la portée de tous, presque gratuite tant elle est à bon marché.

tel que le font en Angleterre les meilleurs esprits dans tous les genres, unis aux artistes les plus habiles. Chez nous aussi, il est temps que le peuple ait un livre de

Le premier numéro du *Musée des familles*, octobre 1833

productions similaires d'outre-Manche et le désir de les surpasser - le maître-mot est «instruction». Il paraît dès la première ligne du recueil: «Déjà nous pouvons réaliser en France, disent les rédacteurs, un cours d'instruction familière, amusante, variée, à la portée de tous, presque gratuitement tant elle est à bon marché, tel que le font en Angleterre les meilleurs esprits dans tous les genres, unis aux artistes les plus habiles»³.

Selon tous les deux recueils, la démarche de vulgarisation qu'ils entreprennent doit être «amusante», «variée». Elle est censée à la fois «intéresser» et «distraire». La gravure en constituerait

² «A tout le monde», *Magasin pittoresque*, 1833, p. 1.

³ «Les magasins anglais», *Musée des familles*, 1833, p. 1.

un des outils les plus efficaces, car «sans les dessins, dit le *Magasin pittoresque*, il est impossible d'arriver à l'éducation complète des hommes grands et petits»⁴. La lecture de cette presse illustrée à portée instructive participerait par conséquent de l'apparition des loisirs: loin d'être austère et rigide, elle se veut agréable, légère et joyeuse.

L'année du lancement du *Magasin pittoresque* et du *Musée des familles* est aussi celle des lois Guizot, qui instaurèrent en France l'école primaire obligatoire. C'est-à-dire que l'avènement de la presse illustrée coïncide à celui d'une scolarisation à grande échelle de même qu'au développement de la pratique de la lecture. Guizot lui-même notait déjà en 1830, avant de devenir ministre de l'Instruction publique, que «le but principal de l'instruction primaire [étant] d'enseigner au peuple la lecture, l'écriture et le calcul, [celui-ci] doit aussi recevoir de salutaires leçons de morale, de patriotisme et d'économie domestique» ainsi que «des explications simples et claires [...] sur les merveilles de la nature, sur les phénomènes qui font naître et entretenir la plupart des préjugés populaires, sur les procédés des arts utiles et de l'agriculture, sur les faits les plus remarquables de l'histoire nationale». Et c'est en tant que véhicules d'informations et de valeurs complémentaires à celles dispensées par l'école, que Guizot envisage le rôle des périodiques: la presse «remplira aisément ces conditions essentielles lorsque des journaux bien adaptés à leur destination seront en usage dans les campagnes»⁵. Les deux publications sur lesquelles nous nous penchons correspondent grandement à ce rôle attribué à la presse, à savoir à la nécessité de combler un besoin d'éducation tout récent à l'époque.

Pour ce qui est des contenus des recueils, ce sont leurs lignes programmatiques qui les synthétisent le mieux. On peut y lire une sorte de définition, jurant par ailleurs avec la concision habituelle d'une pareille démarche, que les deux ouvrages entendent donner d'eux-mêmes. Ainsi, la déclaration du *Magasin pittoresque* commence de la manière suivante:

C'est un vrai Magasin que nous nous sommes proposé d'ouvrir à toutes les curiosités, à toutes les bourses. Nous voulons qu'on y trouve des objets de toute valeur, de tout choix: choses anciennes, choses modernes, animées, inanimées, monumentales, naturelles, civilisées, sauvages, appartenant à la terre, à la mer, au ciel, à tous

⁴«Des moyens d'instruction. Les livres et les images», *Magasin pittoresque*, 1833, p. 98.

⁵ Guizot, «De l'instruction primaire» in Napoléon Landais, *De l'éducation et de l'instruction en France*, Paris, Henri Barba fils aîné, Librairie Editeur, 1837, p. 125.

les temps, venant de tous les pays, de l'Indostan et de la Chine, aussi bien de l'Islande, de la Laponie, de Tombouctou, de Rome ou de Paris; nous voulons, en un mot, imiter dans nos gravures, décrire dans nos articles tout ce qui mérite de fixer l'attention et les regards, tout ce qui offre un sujet intéressant de rêverie, de conversation ou d'étude.⁶

Le *Musée des familles* note lui-aussi l'engagement qu'assument ses rédacteurs, surtout leur objectif d'instruire le public:

Voilà comment nous ferons un journal tout neuf, un journal plein d'amusement, d'instruction, de variété, d'intérêt; journal utile à tous, journal des hommes et des femmes, journal de Paris, journal étranger, journal de tous les hommes, de tous les pays, de tous les temps; journal de la famille surtout, innocent et inoffensif, bien que malin et railleur. Car vous trouverez toutes choses dans cette vaste feuille, même la caricature de Kruikshank; satire populaire et moqueuse, charmante et admirable satire qui parle aux yeux, qui court les rues [...] Ce sera comme un voyage perpétuel et varié, fertile en détails pittoresques, et sans cesse animé par de nouveaux incidents [...]⁷

Tant le *Magasin pittoresque* que le *Musée des familles* souhaitent consigner, collectionner, s'approprier. Les longues listes qui déroulent leurs matières et où le mot «tout» bénéficie de plusieurs occurrences, expriment un désir impérieux d'exhaustivité. On veut «tout» absorber et «tout» dire. Les recueils se présentent comme universels, véritables synthèses du monde, reflets miroitants d'une pluralité et d'une vastitude difficilement réductibles. A leur aune, l'univers est éclaté, les repères sont flous, vacillants, tandis que se manifeste à la fois un intérêt certain pour le dépaysement, le différent et le lointain. Mais si le monde s'avère difficile à organiser – car la liste est en somme entassement, juxtaposition plus ou moins fortuite, allant à l'encontre de la rigoureuse classification – par contre, il est disponible à l'appropriation. L'objectif de dispenser des connaissances va ainsi de pair avec le désir tout puissant de posséder – par le savoir et la raison. Tel est l'un des principaux points communs des deux recueils malgré certaines particularités qui les différencient (notamment le

⁶ «A tout le monde», *Magasin pittoresque*, 1833, p. 1.

⁷ Les magasins anglais», *Musée des familles*, 1833, p. 3.

fait que le premier adopte un style plus neutre, sobre et pesé, tandis que le second reconnaît varier les tons et recourir surtout à des inflexions satiriques).

Mais dans ces démarches d’embrasser le monde, on ne tarde pas de remarquer un vide: les deux ouvrages se détournent du politique. Rien d’anormal en fait, vu les contraintes qui pesaient à l’époque sur le monde de la presse. Car les publications furent sévèrement réglementées jusqu’en 1848 et la liberté de la presse ne fut instaurée qu’en 1881, au moment où les recueils étaient presque sexagénaires.

Au sein des premiers magazines illustrés se fait jour également une action normalisatrice à portée éthique. Pour eux, instruire ne va pas sans éduquer. Dans l’« Avertissement » qui inaugure sa dix-septième année de parution, le *Musée des familles* présente la longue existence dont il jouit sur le marché de la presse comme une période «de progrès constants, de moralité sans tache et de popularité incontestable »⁸. Le second terme de l’aperçu que le *Musée* donne de lui-même nous importe beaucoup. Quant au *Magasin pittoresque*, celui-ci note: « Parmi le petit nombre des axiomes politiques admis généralement, il en est un qui fait reposer la probité des hommes et l’amélioration de leur sort sur la somme d’instruction qu’ils possèdent. *Instruisez les hommes et vous les rendrez vertueux.* »⁹ Selon toute apparence, entre savoir et moralité, le *Magasin* privilégie la dernière. Il ne se donne pas seulement pour but d’emmagasiner des savoirs variés, mais aussi de contribuer à éduquer, notamment à répandre au sein de son public des normes morales. A son aune, élargir et nourrir des compétences intellectuelles ne serait souhaitable que si cela entraînait une amélioration du caractère, une certaine évolution morale en dehors de l’élévation de l’esprit.

Par conséquent, pour les deux périodiques sortis en 1833, dispenser des savoirs devrait s’entremêler étroitement à une action de moralisation de l’individu et de normalisation de la société, voire en être un outil privilégié.

Les deux périodiques, tout comme *The Penny Magazine* qui leur sert de modèle, se comparent à des moyens de déplacements. Le *Magasin pittoresque* évoque, dès ses premières lignes, une innovation des transports, à savoir les «longues voitures à huit et dix fenêtres

⁸ *Musée des familles*, 1848.

⁹ «Des moyens d’instruction. Les livres et les images», *Magasin pittoresque*, 1833, p. 98.

[...] s'arrêtant patiemment de minute en minute, pour laisser monter et descendre à loisir hommes et femmes, ouvriers et bourgeois, grands et petits, moyennant quelques gros sous»¹⁰. L'apparition du *Magasin pittoresque* dans le monde de la presse représenterait donc une nouveauté similaire à l'utilisation dans l'espace urbain de ces premiers omnibus. De cette manière, le périodique affirme son caractère démocratique et se présente à la fois comme un véritable moyen de maîtrise de l'espace, sorte d'outil qui met le lointain à la portée de tous. Pour donner au public un premier aperçu de ses visées, le *Musée des familles* recourt lui-aussi à l'image du voyage:

Nous aurons soin, avant tout, de bien voir pour vous dire après ce que nous aurons vu. Nous allons donc nous mettre en quête de nouveautés de tout genre. Nous irons tantôt doucement, tantôt vite, plus souvent à pied qu'en voiture; et une fois en route nous nous arrêterons partout où nous aurons quelque chose à recueillir, partout où nos yeux choisiront quelque étude pour un crayon docile: ainsi, après nous être reposés la veille sur des ruines, le lendemain nous nous arrêterons dans quelque honnête habitation de villageois.¹¹

Les recueils ambitionnent d'être une ouverture au monde, sorte d'outils capables de rendre le vaste univers proche et accessible. Leur lecture serait un voyage par procuration. Grâce aux gravures et aux textes qu'ils prodiguent, des images d'ici et d'ailleurs défilent devant un public immobile de corps, mais peu ou prou délivré mentalement de l'ancrage au même endroit. Fort à propos d'ailleurs, car l'époque marque aussi l'émergence d'une nouvelle pratique, qui se développera massivement après le mi-siècle: le tourisme. Par ailleurs, quelques années après la consignation des lignes ci-dessus, en 1838, Stendhal publia ses *Mémoires d'un touriste*, le néologisme utilisé dans le titre de l'ouvrage à la place du mot « voyageur » étant à son tour révélateur d'une curiosité toute nouvelle pour l'espace et d'un attrait de plus en plus fort pour les déplacements au long cours.

Composante de cet engouement pour les voyages instructifs, l'intérêt pour le territoire national, notamment les monuments et les curiosités,

¹⁰ « A tout le monde », *ibid.*, p. 1.

¹¹ « Les magasins anglais », *Musée des familles*, 1833, p. 5.

occupe dans les premières déclinaisons de presse illustrée une place de choix. Dans sa livraison de 1844, le *Magasin pittoresque* note:

Commencé il y a douze ans, notre tour de France est encore bien loin de la fin. Nous avançons lentement, à l'aventure, comme en une promenade plutôt qu'en un voyage. Rien ne presse à vrai dire: nous n'épuiserons pas les merveilles, les curiosités sans nombre, les œuvres remarquables de l'art et de la nature qui à chaque pas, sur le sol de notre beau pays, s'offrent à nos regards. [...]¹²

«Nous aussi, affirment à leur tour les rédacteurs du *Musée des familles*, nous voulons faire une histoire complète de Paris et de la France, comme les Anglais ont fait une histoire complète de leur ville et de leur contrée»¹³.

Arrivés à la fin de notre incursion dans les recueils illustrés qui virent le jour sous la monarchie de Juillet, faisons le point sur leurs particularités. A une époque de progressives démocratisation, homogénéisation sociale et mobilité, se font sentir tant un impérieux besoin d'instruire et d'éduquer qu'une curiosité naissante pour l'espace, soit-il en deçà ou au-delà des frontières. Or ces premiers périodiques illustrés à bon marché dispensent justement des connaissances et des normes de même qu'ils familiarisent leur public avec la diversité du monde.

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¹² «Loupjac», *Magasin pittoresque*, 1844, p. 113.

¹³ «Les magasins anglais», *Musée des familles*, 1833, p. 3.

MCLUHAN AND MASS EDUCATION. UNIVERSITY AS "TEACHING MACHINE"

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Abstract: *This paper focuses on some aspects of McLuhan's educational reflection, that does not neglect the evolution of the higher education institutions in the age of technological accelerations. Specifically, McLuhan is deeply aware of the particular phase in which universities are no longer elitist functional systems and become a mass educational industry. This is the interpretative perspective of McLuhan's interest for the processes of innovation in the field of higher education, highlighting the socio-cultural, political and productive shifts peculiar of the economic prosperity age.*

*The heuristic aim of the paper is to deepen the knowledge of McLuhan's sociology of University. The latter is a significant field of study, especially in regard to the mediological research fostered in *Understanding Media* (1964), where his style makes him appear as a dowsing of research. From this perspective, such an interpretative approach allows one to highlight the relationship between "the teaching machine" and the interactional practices introduced by new technologies, which make the symbolic universes of daily life subject to fluctuations that have become permanent.*

Keywords: *Marshall McLuhan, higher education, sociology of university, communicative innovation.*

McLuhan and the myth of the automated University

In reference to the analysis of the use and diffusion of mass media in the age of the acceleration of informative processes and the demolition of spatial and temporal barriers, McLuhan extends his survey to the interactional innovations produced by the advent of the mass society and the consequent socio-cultural changes, which are strongly tied to the changes of symbolic universes, of value categories and of the experiential declinations of the contemporary age¹.

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¹ On the relationship between higher education and social innovation see R. Cavell Richard, *McLuhan in Space: Cultural Geography*, University of Toronto, Toronto 2003; G.

McLuhan has no doubts about the consequences that such changes imply for educational processes, bound to meet educational and cognitive instances that might keep pace with the functional evolution of a society projected towards the new challenges of globalization. In fact, mediality and education are strictly related, as the recent reforms promoted in the Italian university system show². Education has not only the task to introduce good practices in terms of quality, efficiency, assessment and accountability, but it also needs to conform to the new communicative trends peculiar of the digital age. This process has direct consequences on teaching and research methods, in accordance with the marketing strategies of universities³.

Also for these reasons, a process of rationalization has been started. This process ranges from the organization of learning courses to professors and researchers' recruitment. This process is also a consequence of the reduction of funds available due to the economic crisis, which unavoidably affects investments on education and the valorization of human capital. Thus, the metaphor of university as a "marketplace" becomes a possible interpretative key of the innovations acknowledged by higher education systems in the age marked by the globalization of knowledge, digitalized communicative interactions, and a value crisis that Bauman's individualized society lives today because of the great cultural revolutions of post-modernity⁴.

Industry as a whole has become the unit of reckoning, and so with society, politics, and education as wholes. In the same way, the social and educational patterns latent in automation are those of self-employment and artistic autonomy. Panic about automation as a threat of uniformity on a world scale is the projection into the future of mechanical standardization and specialism, which are now past⁵.

Wilmott, *McLuhan, or Modernism in Reverse*, University of Toronto, Toronto 1996.

² For further information about the process of academic innovation in Italy see, in particular, A. Masia, M. Morcellini, (eds.), *L'Università al futuro. Sistema, progetto, innovazione*, Giuffrè editore, Milano 2009.

³ Paul Axelrod analyzed the evolution of University systems into sheer "marketplaces". See his *University in Conflict: The University, the Marketplace and the Trials of Liberal Education*, McGill-Queen's University Press, Montreal & Kingstone, London, Ithaca 2002.

⁴ Zygmunt Bauman successfully remarked the social consequences peculiar of liquid society in terms of individualization of social act: Z. Bauman, *The Individualized Society*, Polity Press, Cambridge (UK) 2001.

⁵ M. McLuhan, *Understanding Media: The Extensions of Man* (1964), edited by W.

In his main works, McLuhan deals with the social consequences tied to the diffusion of new forms of automation and to the shifts imposed by the cultural industry at the dawn of globalization⁶. Specifically, in the conclusive pages of *Understanding Media*, focused on the communicative changes engendered by the advent of modernity, he lingers on the educational innovations introduced by the technological speed-up of the Sixties. This is an historical phase characterized by the diffusion of the cultural industry and media, bound to produce new socio-cultural phenomena. The economic prosperity marks a fundamental turning point not only in communicative practices, but also in the behavioral habits of social actors, in productive processes, in educational practices, and in the modalities of cultural consumption. These aspects involve cinema, radio, art, music, and journalism.

Society as a whole is endowed with structural and functional changes that are so much epochal. In the foreground, there are direct consequences for the re-placing and re-definition of the value and symbolic frameworks of reality:

The very idea of communication as interplay is inherent in the electrical, which combines both energy and information in its intensive manifold. Anybody who begins to examine the patterns of automation finds its perfecting the individual machine by making it automatic involves "feedback". That means introducing an information loop or circuit, where before there had been merely a one-way flow or mechanical sequence. Feedback is the end of the lineality that came into the Western world with the alphabet and the continuous forms of Euclidean space. Feedback or dialogue between the mechanism and its environment brings a further weaving of individual machines into a galaxy of such machines throughout the entire plant. There follows a still further weaving of individual plants and factories into the entire industrial matrix of

Terrence Gordon, Gingko Press, Corte Madera (CA) 2003, pages 472-473. McLuhan's theory has been highly influenced by Harold A. Innis. In regard to the evolution of university systems, it might be worth reading Innis' essay written in 1947, *Adult Education and Universities*, in Id., *The Bias of Communication*, II edition, University of Toronto Press, Toronto 2008, pages 203-214. It might be also worth noting that the year before the publication of *Understanding media*, Parsons published his study on young American education: Talcott Parsons, *Youth in the Context of American Society*, «American Sociological Review», vol. 27, 1963, pages 97-123.

⁶ Terence Gordon has clearly emphasized McLuhan's interest in analyzing the consequences of medial revolution: Gordon W. Terence, *McLuhan: A Guide for the Perplexed*, Continuum, London-New York 2010.

materials and services of culture. Naturally, this last stage encounters the entire world of policy, since to deal with the whole industrial complex as an organic system affects employment, security, education, and politics, demanding full understanding in advance of coming structural change. There is no room for witless assumptions and subliminal factors in such electrical and instant organizations⁷.

Since the “medium is the message”, it is possible to interpret the shifts imposed by modernity according to new educational paradigms, which ought to respond to the social indications defined by the early society of knowledge. Educational institutions are about to carry out a new social and communicative task. Both schools and universities are about to define their own cultural endeavor, according to new and unforeseen heuristic instances, bound to foster an attentive reflection on the organization of the didactic system, the structure of governance, the relationships with working actors, the synergies with the environment they belong to, the role of professors, the right to study⁸. These are all aspects that, from McLuhan’s perspective, gain a fundamental strategic meaning in regard to the planning of funds and the discharge of an educational request destined to increase exponentially with the advent of mass and democratic universities in the twenty-first century.

A much more modern and dynamic university looms on the horizon. Derrida would talk about a university with “no strings attached”⁹. Like productive organizations, university, conceived as a breeding ground of knowledge and culture, must face the great innovations introduced on multiple levels by electric automation, which implies a reliable reassessment of the socio-cultural mission peculiar of an institution born and developed in the Middle Ages.

Starting from its birth, university had to indulge the several shifts engendered by progress, which, since the industrial revolution, has been having a frenetic pace involving all the sectors of public and private life. In

⁷ McLuhan, *Understanding Media*, p. 468.

⁸ For further investigation: N. Postman, *Teaching as a Conserving Activity*, Delacorte Press, New York 1979; J. Habermas, *Universitätstage* 1967, *Universität und Demokratie*, Walter de Gruyter & Co., Berlin 1967; T. Parsons, *The School Class as a Social System: Some of its Functions in American Society*, in «Harvard Educational Review», 29, 1959, pages 297-318.

⁹ The reference is to J. Derrida, *L’Université sans condition*, Éditions Galilée, Paris 2001; Eng. tr.: *The Future of the Profession or the University without Condition*, in Tom Cohen (ed.), *Jacques Derrida and the Humanities. A Critical Reader*, Cambridge University Press, Cambridge (UK) 2002, pages 24-57.

compliance with the versatility of productive processes and a faster diffusion of disciplines (enhanced by the advent of electric mass media, both cold and hot according to their capabilities of involving the audience), the social role of individuals undergoes deep changes, above all a progressive fragmentation of experience bound to affect the social relationships built by actors in the electric age.

Therefore, society acquires a computational value, ruled by the new religion of calculation developed thanks to the diffusion of new mass media, especially the telephone: "Industry as a whole has become the unit of reckoning, and so with society, politics, and education as wholes". Well ahead of the globalization era, ruled by statistic elaborations aimed at interpreting reality by the means of qualitative and quantitative patterns, McLuhan foresees the advent of a mass society inspired by the principle of productivity, functional efficiency, and communicative effectiveness¹⁰.

Moreover, he emphasizes the full educational prerogatives of the mass society. In order to check its heuristic soundness it is necessary to trust the numbers, not only for industry, transports and engineering, but also for education. In fact, education is a field deeply modified by the social influence of the cultural industry and the advent of the new knowledge society:

Now that man has extended his central nervous system by electric technology, the field of battle has shifted to mental image-making-and-breaking, both in war and in business. Until the electric age, higher education has been a privilege and a luxury for the leisured classes; today it has become a necessity for production and survival. Now, when information itself is the main traffic, the need for advanced knowledge presses on the spirits of the most the most routine-ridden minds. So sudden an upsurge of academic training into the marketplace has in it the quality of classical peripety or reversal, and the result has been a wild guffaw from the gallery and the campus. The hilarity, however, will die down as the Executive Suites are taken over by the Ph.D.s.¹¹

In the beginning there was the manuscript, conceived as an expression of an elitist culture, prerogative of a learned class. This socially appreciated class had the chance to study in medieval libraries and

¹⁰ On the relationship between mass society and communicative speedup in McLuhan's surveys it might be worth reading R. Cavell, *McLuhan in Space: Cultural Geography*, University of Toronto, Toronto 2003.

¹¹ McLuhan, *Understanding Media*, p. 142.

monasteries imbued with Scholasticism¹². As remarked by McLuhan, universities were born in this precise historical moment and became soon cultural engines functioning above temporal institutions, social bonds, doctrinal disputes, spatial and temporal boundaries, the fragmentation of knowledge, and the influence still exerted by the classical culture.

University slowly looms as a socially legitimated cognitive hotbed, also thanks to the contribution of relevant personalities in the fields of theology, law, sciences, and philosophy. However, it is quite clear that, until the invention of press, the use of specialized knowledge (as in the case of manuscripts handed down by both laic and religious skillful amanuenses) is reserved to an elitist cultural circuit, confined within the boundaries of great cultural centers, accessible provided that great financial resources are available.

After Gutenberg's invention, social life is destined to deeply change. As the diffusion of knowledge increases, symbolic reticulates change too, together with experiential values and the cognitive possibilities of a society increasingly projected towards the definition of new heuristic models and needful to interpret the shifting forms of reality. McLuhan describes one of the fundamental principles of his sociological theory based on the lesson of the past: "All meaning alters with acceleration, because all patterns of personal and political interdependence change with any acceleration of information"¹³. The new cognitive inputs determined by the unstoppable advance of technology cause a re-adjustment of the expressive and cultural codices ruling sociality, projected towards new interactional approaches. McLuhan's statement can be much more shared nowadays. The genius of Gutenberg is shaded by the inventions of Bill Gates and Steve Jobs, who loom as the expression of a modernity bound to exploit diffused connectivity as a sheer social habitus, capable of influencing habits, behaviors, and reflective praxis.

Needless to remark, e-books are just the last manifestation of an increasingly digitalized progress. Its feature is to reconvert the communicative habits of an information society constantly changing. McLuhan deals with an incoming society bound to be nourished by images and symbols. At the same time, society has rediscovered (as

¹² In his historical reflections McLuhan dealt with the educational strategies peculiar of Medieval Ages: M. McLuhan, *The Gutenberg Galaxy: The Making of Typographic Man* (1962), with new essays by W. Terrence Gordon, Elena Lamberti, Dominique Scheffel-Dunand, University of Toronto Press, Toronto Buffalo London 2011, pages. 107-120.

¹³ McLuhan, *Understanding Media*, p. 269.

Roland Barthes would point out) the “pleasure of text” and the performing capability of words, re-semanticized by the new communicative environments molded by social networking sites, smart phones, and tablets. The global village outlined by McLuhan has finally taken form, involving all the aspects of social life, education included. After all, the digital revolution has been interiorized by universities too, thanks to an external sensitivity without precedents for universities, traditionally reticent to accept meddling or public accounts¹⁴.

Universities and the visual evolution of knowledge

Everything changes along with technological acceleration, increasing international mobility and the globalization of knowledge, which make the university medieval paradigm obsolete. Universities are no longer guardians of a vested knowledge, especially in our times, ruled by the unavoidable informative influence of television, become almost invasive. It is quite clear that universities, in order to keep their cultural identity, cannot limit themselves to a weak mechanical transmission of knowledge. They risk neglecting the vortex of changes destined to influence educational praxis itself¹⁵. They should allow the youth to access labor, politics, and society. It is not possible to be resistant to unavoidable reform processes, especially in an age marked by the perishable nature of knowledge:

In the same way the excessive tactile effects of the TV image cannot be met by mere program changes. Imaginative strategy based on adequate diagnosis would prescribe a corresponding depth or structural approach to the existing literary and visual world. If we persist in a conventional approach to these developments our traditional culture will be swept aside as scholasticism was in the sixteenth century. Had the Schoolmen with their complex oral culture understood the Gutenberg technology, they could have created a new synthesis of written and oral education, instead of bowing out of the picture and allowing the merely visual page to take over the educational enterprise. The oral Schoolmen did not meet

¹⁴ On the educational shifts bolstered by the advent of digital communities see R. Barnett, *Imagining the University*, Routledge, London-New York 2013; J. Biggs, C. Tang, *Teaching for Quality Learning at University: What the Student Does*, McGraw Hill, Maidenhead-New York 2011⁴.

¹⁵ This is what the book of John Bowden and Ference Marton purposes to point out: *The University of Learning: Beyond Quality and Competence*, Routledge, London-New York 1998.

the new visual challenge of print, and the resulting expansion or explosion of Gutenberg technology was in many respects an impoverishment of the culture, as historians like Mumford are now beginning to explain¹⁶.

In comparison with Gutenberg's times, the academic world has learnt to manage the visual evolutions of knowledge. Furthermore, the academic system has learnt to interpret the changes of social iconography, to express semiotic displays of an education that celebrates the Internet and digital devices, more than traditional paper supports. For this reasons, the incoming university of our times acquires the polyhedral form of an excellence system that attempts to face the expectations of new student generations, submerged in the digital revolution of the Internet¹⁷. At the same time, students risk to get lost in an increasingly liquid and connected modernity.

After all, universities (at least in Italy) fight against the chronic problems permeating a reformist season that has become almost permanent, because of a financial crisis that does not seem to have been tackled yet¹⁸. As a matter of fact, the shift towards a "marketplace" approach makes universities sheer productive systems, with direct consequences in terms of visibility, marketing, and attractiveness. It is quite undeniable that university education has not promptly faced the challenge of innovation enhanced by the digital revolution. It is also a fact that such old institutions (as well as the Church) have usually different patterns in comparison with other functional systems. Basically, these institutions are used to conceive technological innovation as a hallmark of their own activity.

Compared to the Middle Ages, universities are no longer an exclusive prerogative of well-off classes, since they are bound to satisfy the educational needs of the mass society. Knowledge travels over the Internet. This is the new revolution that McLuhan would have connected to the epochal one fostered by the press. Its invention determined deep changes in university teaching:

¹⁶ McLuhan, *Understanding Media*, p. 103.

¹⁷ In reference to the advent of communicative society in the era of medial complexity it might be worth reading H. Jenkins, *Convergence Culture: Where Old and New Media Collide*, New York University Press, New York-London 2006; D. De Kerckhove, *Connected Intelligence: the Arrival of the Web Society*, Somerville House Publ., Toronto 1997.

¹⁸ For further information on the criticalities of hyper-reformism in Italian higher education systems see A. Lombardinilo, *Building University. In una società aperta e competitiva*, Armando editore, Roma 2014.

Typography was no more an addition to the scribal art than the motorcar was an addition to the horse. Printing had its “horseless carriage” phase of being misconceived and misapplied during its first decades, when it was not uncommon for the purchaser of a printed book to take it to a scribe to have it copied and illustrated. Even in the early eighteenth century a “textbook” was still defined as a “Classick Author written very wide by the Studens, to give room for an Interpretation dictated by the Master, &c., to be inserted in the Interlines” (O.E.D.). Before printing, much of the time in school and college classrooms was spent in making such texts. The classroom tended to be a *scriptorium* with a commentary. The student was an editor-publisher. By the same token the book market was a secondhand market of relatively scarce items. Printing changed learning and marketing processes alike. The book was the first teaching machine and also the first mass-produced commodity. In amplifying and extending the written world, typography revealed and greatly extended the structure of writing¹⁹.

In the Internet age, the structure of writing gets more dynamic by the means of fluctuant and shifting communicative flows, framed in speaking contexts increasingly in progress. Long after scribes and amanuenses, communicative actors (both students and professors) have replaced the typographic art with the keyboards of tablets, which allow writing to assume the expected form almost in real time. At the same time, new electric tools have knocked down spatial and temporal barriers that were once insurmountable. It is evident that such a communicative eagerness needs the proper educational substrate, which has become indispensable to take part to the public sphere as recently described by Habermas²⁰.

Nowadays, university faces a new season of changes, determined by a digital revolution that has no boundaries. This is the era of the assessment of research products submitted in pdf format. This is the time of electronic bulletin boards, of examination commissions that work in a digital way, and of e-learning courses. E-learning offers a great deal of educational chances, becoming an added value for experimentation and use of knowledge. As a result, McLuhan highlights the central role that writing has played (and still plays today) in educational processes, despite the evolution of learning supports and devices.

¹⁹ McLuhan, *Understanding Media*, pages 236-237.

²⁰ The reference is to J. Habermas, *Ach, Europa. Kleine Politische Schriften XI* (2008), Suhrkamp Verlag, Frankfurt am Main; Eng. tr.: *Europe: The Faltering Project*, Polity Press, Cambridge, 2009.

According to McLuhan, the book “the first teaching machine and also the first mass-produced commodity”. Nevertheless, it has no longer an independent existence. This happens because a classroom (or a library) cannot be imagined as a space crowded by students deprived of their own laptops or tablets, which they use to consult sources, information, and integrative documents and are therefore bound to implement their study. Medieval students, constantly talking to the studied authors that are both publishers and writers, are replaced by postmodern students submerged in the liquid complexity of the twenty-first century. The latter is ruled by an unceasing technological acceleration, which makes any instrumental support obsolete and incapable of keeping pace with innovation. This discourse is valid for educational systems as well as for the cultural industry, bound to indulge the instances of entertainment peculiar of a too much globalized society²¹:

Today, with the cinema and the electric speedup of information movement, the formal structure of the printed word, as of mechanism in general, stands forth like a branch washed up on the beach. A new medium is never an addition to an old one, nor does it leave the old one in peace. It never ceases to oppress the older media until it finds new shapes and positions for them. Manuscript culture had sustained an oral procedure in education that was called “scholasticism” at its higher levels; but by putting the same text in front of any given number of students or readers print ended the scholastic regime of oral disputation very quickly. Print provided a vast new memory for past writings that made a personal memory inadequate²².

The advent of modernity makes medieval oral disputations, the Renaissance paradigm of typographic interlocution and the morning habit of getting information from newspapers obsolete. In the foreground, there is the strengthening of the knowledge society, which does not succeed in keeping pace with hectic technological speedups, fostered by increasingly immediate and compulsive cultural consumptions²³. The sociological scenario might be more complete by taking into account also the evasion

²¹ On the educational shifts peculiar of our complexity see R. Cowen, E. Klerides, «Mobilities and Educational Metamorphoses: Patterns, Puzzles, and Possibilities» [Special issue], *Comparative Education*, 45(3), 2009.

²² McLuhan, *Understanding Media*, p. 237.

²³ On the different cognitive functions of universities in the era of post-modernity see C. Kerr, *The Uses of University*, Harvard University Press, Cambridge (MA)-London 2001⁵.

instances nourished by the value (and economic) crisis of our times and the several communicative contexts offered by the Internet.

Surely, these are the most evident effects of a profound transformation process that is hard to understand. In the light of this evolution, university aims at gaining back the guide role it played in the previous centuries. Nevertheless, this role has weakened, also due to several criticalities, such as the lack of representativeness and accountability, the protection of corporative interests, and the excessive self-reference that historically marks academic institutions.

In the age of globalization, universities risk to lose the authority given by a secular history and a conscious practice of knowledge, as opportunely outlined by Bauman:

This is, roughly, the gist of the present crisis: with virtually all orthodox grounds and justifications of their once elevated position either gone or considerably weakened, universities (at least in the developed and affluent countries – in the ‘modernizing’ countries they may still play the traditional role of factories supplying a heretofore missing educated elite) face the need to rethink and articulate anew their role in a world that has no use for their traditional services, sets new rules for the game of prestige and influence, and views with growing suspicion the values they stood for²⁴.

Education as “civil defense against media fall-out”

The diffusion of new digital communications attests the growth of the virtual square of the Internet. For instance, universities themselves make use of social networking sites in order to increase their visibility and improve their informative services for students. As a result, writing gains new expressive functions, in the light of a functional re-configuration stemming from the digital revolution. All these facts have direct consequences on accessibility and participation to the university life, in terms of a democracy that should be more reliable than it was in the past. But is this really the case? Are we really in the presence of the “University in the democracy” as pointed out by Habermas at the dawn of the 1968 revolution? The social diversification of university users seems to mingle with the unexpected fragmentation of communicative experiences, enhanced by the individual management of relations projected on social networking sites.

²⁴ Z. Bauman, *The Present Crisis of the Universities*, in J. Brzezinski, N. Leszek (eds.), *The Idea of the University*, Rodopi, Amsterdam 1997, p. 51.

The relational dynamics that mark university systems in the age of the web 2.0 make no exception, despite the destruction of spatial and temporal barriers and the globalization of communicative flows. Nowadays, students are cybernetic actors who conceive computers as extensions of their own nervous system, as a ramified appendix of their own body structure. Digitalized students have replaced pencils, pens and white chalk with keyboards, from the smallest and immaterial ones of mobile phones to the bigger ones of laptops.

Even keys or buttons are now replaced by new touch-screens, which have completely dematerialized the act of writing, compelled to change structure and form, without losing its communicative dimension that has always characterized social existence. In order to understand new communicative platforms it is necessary to analyze the evolution of writing and learn their semantic and expressive complexity, as it happened in the medieval scriptorium, where the dialogue with studied authors was a stylistic and cognitive exercise, rather than exegetic. This is the task that education is charged with: provide students with the fundamental interpretative tools of a society nourished by a great deal of images and information without precedents in the history of humanity, bound to face the globalization of knowledge²⁵. It follows the need to interpret ever-changing languages, stemming from rapid and fluctuant value shifts:

Education is ideally civil defense against media fall-out. Yet Western man has had, so far, non education or equipment for meeting any of the new media on their own terms. Literate man is not only numb and vague in the presence of film or photo, but he intensifies his ineptness by a defensive arrogance and condescension to “pop kulch” and “mass entertainment”. It was in this spirit of bulldog opacity that the scholastic philosophers failed to meet the challenge of the printed book in the sixteenth century. The vested interests of acquired knowledge and conventional wisdom have always been by-passed and engulfed by new media. The study of this process, however, whether for the purpose of fixity or of change, has scarcely begun²⁶.

²⁵ On the heuristic convergence between cultural features and interactional skills it might be worth radon R. K. Logan, *Understanding New Media: Extending Marshall McLuhan*, Peter Lang, New York 2010.

²⁶ McLuhan, *Understanding Media*, p. 264.

On the one hand, McLuhan argues that universities realized too late the meaning of the social and expressive changes introduced first by the cultural industry and then by the digital revolution. On the other hand, he points out that there is no other educational institution capable of elaborating and proposing cultural solutions suitable to the dominion of the culture of images diffused by media. This new visual dimension is often transformed into a mere consumer good, available in any season for all interlocutors. Therefore, university systems must exploit as much as possible their own identity heritage and international prestige to become relevant socio-cultural actors, in a communicative scenario that does not seem to offer lasting cognitive features. It follows the need to conserve and divulge the great knowledge inherited from the past according to original educational approaches, renewed according to the heuristic dictates imposed by the society of information²⁷.

The dialectic relationship between innovation and tradition, in which innovation is the strongest pole, must assume a new functional balance, bound to contrast the “fall out of media” highlighted by McLuhan well ahead of the communicative explosion engendered by the advent of broadband networks and smart phones. In the age of diffused connectivity, knowledge, education, and study should be the best defense (not only civil, but also intellectual) against the invasive action carried out by the cultural industry in regard to shared behaviors, relational praxis and informative paradigms. The pursuit of the changes fostered by new digital media (about to foster significant inclusive chances even in the educational field) carried out by universities confirms, on the one hand, the awareness of the system to indulge the challenge of innovation imposed by modernity. On the other hand, it shows that “The vested interests of acquired knowledge and conventional wisdom have always been by-passed and engulfed by new media”. Universities embody the greatest expression of this innovation process in the didactic field.

This discourse may also concern the Church in the institutional field, as well as public research organizations and historical academies in the cultural field. Fifty years after McLuhan’s analysis, university systems are undergoing a deep process of change, inspired also by a greater availability of scientific and technological innovations belonging to an extra academic area. This

²⁷ Paul Levinson dealt with McLuhan’s informative sensitivity at the dawn of global village of information: *Digital McLuhan: A Guide to the Information Millennium*, Routledge, New York-London 1999.

process is characterized by the awareness about a-historicity, which marks the apparent refusal to collaborate of the last years.

Thus, it is not surprising that mass culture has become a permanent subject of study of university research, which attempts to interpret the signs of renewal according to the social shifts nourished by the digital revolution. Two aspects emphasized by McLuhan are fully evident nowadays: the multi-disciplinary nature of many professional sectors and the functional versatility of several branches of knowledge. These two aspects call for the construction of an open, dynamic and up-to-date educational strategy. As a result, science must face the de-specialization of the civil society, expected to find jobs and work environments that are no longer stable due to the economic crisis:

The world of science has become quite self-conscious about the play element in its endless experiments with models of situations otherwise unobservable. Management training centers have long used games as a means of developing new business perception. John Kenneth Galbraith argues that business must now study art, for the artist makes models of problems and situations that have not yet emerged in the larger matrix of society, giving the artistically perceptive businessman a decade of leeway in his planning.

In the electric age, the closing of the gaps between art and business, or between campus and community, are part of the overall implosion that closes the ranks of specialists at all levels. Flaubert, the French novelist of the nineteenth century, felt that the Franco-Prussian War could have been avoided if people had heeded his *Sentimental Education*. A similar feeling has since come to be widely held by artists. They know that they are engaged in making live models of situations that have not yet matured in the society at large. In their artistic play, they discovered what is actually happening, and thus they appear to be "ahead of their time". Non-artists always look at the present through the spectacles of the preceding age. General staffs are always magnificently prepared to fight the previous war²⁸.

The reference to Flaubert attests the strategic role played by interdisciplinarity, educational contamination, and cultural syncretism, also in those contexts apparently impermeable to external interferences. After all, the university management has realized the impossibility to delay the renewal process imposed by globalization. Furthermore, the promotion of the Bologna Process represents the attempt (partly achieved)

²⁸ McLuhan, *Understanding Media*, pages 324-325.

to make universities innovative and reliable modern educational systems²⁹ (Cowen 2000).

The new challenge concerns the increase in the quality and efficiency of didactics, together with the purpose (much more ambitious) to enhance services for students and for research activities, despite the progressive cutbacks of financial resources. This factor unavoidably hampers the process of democratization of university systems, imposed by the advent of post-modernity. This means that universities cannot afford to look “at the present through the spectacles of the preceding age”, or to consider human capital in specialized terms. It follows that multiculturalism, globalization, and interdisciplinarity require a much more dynamic, interactive, and transversal approach, as the phenomenon of the humanistic graduate increasingly sought after by private companies shows.

In conclusion. McLuhan and key concepts of university reformism

The post-modern age is about to make education a “unit of reckoning”, subject to rigid rules and competition. Universities pose as functional systems engaged with profound “structural change” and the “the need for advanced knowledge”. Furthermore, communication turns into an interdisciplinary educational process, aimed at overcoming the “present patterns of fragmented unrelation”. As a result, schools become dynamic learning environments, compelled to refuse “the fragmentary and piecemeal character of mechanism”. Finally, the “decentralism and the flexibility of multiple small centers” loom as the concrete programmatic solution to the increasing educational demand of the Sixties.

These are only some of McLuhan’s insights about the reform of the educational and cultural processes of his times, marked by the transition from elitist educational systems to mass training industries. His insights are still relevant nowadays, since they pose significant questions to educational actors, engaged in the definition of new teaching strategies. McLuhan has no doubt about the functional priorities of universities. After all, the advent of modernity implies the re-interpretation of socio-educational instances and the change of productive processes. McLuhan points out the need to analyze the evolution of cultural consumption, the

²⁹ This is an aspect clearly emphasized by Robert Cowen in reference to the marketing strategies of Universities: «*The market-framed university: The new ethics of the game*», in J. Cairns, R. Gardner e D. Lawton (eds.), *Values and curriculum*, Woburn Press, London 2000, pages 93-105.

communicative revolution boosted by new media and the increasingly interconnection of knowledge. All these factors found the current harmonization process of higher educational systems, i.e. the Bologna Process³⁰.

McLuhan succeeded in foreseeing the fragmentation of study courses and teachings, university delocalization, the influence of new communicative practices on the way to teach and to do research work, and the divide between education and labor market. "The future of work consists of learning a living in the automation age". This is one of the tasks universities are charged with also in regard to the communicative strategies, transparency and accountability.

As the circularity of knowledge rises to a hallmark of digitalized training processes, McLuhan's sociological engagement gains a new heuristic value. As a matter of fact, he proposes to intertwine educational experiences and social facts, in order to face the problems linked to the permanent change of daily symbolic universes: "But automation forces not only industry and town planners, but government and even education, to come into some relation to social facts". This is one of the several warnings bequeathed by McLuhan to the medial university of our times, involved in the tough endeavor of assessment, merit, and transparency. In the foreground, there is the ever-changing dematerialized society, where the "formal structure of the printed word" is bound to profound be changed by the Internet, thanks to a renewed expressive nexus between medium and message³¹.

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³⁰ For further investigation see G. Neave, *The Evaluative State. Institutional Autonomy and Re-engineering Higher Education in Western Europe. The Prince and His Pleasure*, Palgrave Macmillan, New York 2012.

³¹ G. Gamaleri, *La nuova galassia McLuhan: Vivere l'implosione del pianeta*, Armando, Roma 2013.

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THE ERUDITE PATTERN OF SPATIAL REPRESENTATION IN DU CAMP'S WRITINGS

LE MODÈLE D'ÉRUDITION ET LA REPRÉSENTATION DE L'ESPACE CHEZ DU CAMP

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Abstract: *Maxime Du Camp was known in the French literary history as a member of the French Academy (elected in 1880), a pioneer of photography, author of many travelogues and one of the founders of La Revue de Paris which published Madame Bovary. This article aims to render the author's representation of antique vestiges, filtered by his vast knowledge acquired through a so-called instruction journey, an elite pedagogical and cultural institution of the time.*

Keywords: *instruction journey, antique edifices, representation*

En 1848, étant membre de la Société orientale, l'écrivain Maxime Du Camp commence à préparer un important voyage en Orient, d'où il désire revenir avec une riche documentation inédite sur les pays qu'il va visiter. Il annonce son projet aux autorités scientifiques et sollicite d'une manière officielle à l'Académie des Inscriptions et Belles-Lettres des « instructions » pour son voyage. L'institution lui répond par un message qui met en évidence son « habileté des voyages » et la « noble ambition qui l'anime de servir la science à travers les dangers ». Les académiciens lui offrent des informations sur quelques sites et l'encouragent à « noter sur place tout ce qu'il voit » et à « s'enquérir de tous les objets de ses recherches avec égal intérêt », copier les inscriptions grecques, latines, démotiques, les détails d'un monument, des légendes, etc.; pour ce faire, ils l'encouragent aussi à utiliser la photographie, « ce nouveau compagnon, habile, prompt et toujours scrupuleusement fidèle ».¹

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¹ Gustave Flaubert, *Voyage en Egypte*, Bernard Grasset, Paris, 1991, p. 49.

Son voyage en Orient, le grand voyage de sa vie à la fin duquel il affirme avoir énormément aimé ce monde², représentait premièrement une mission archéologique. C'est la raison pour laquelle Du Camp est un visiteur acharné des édifices, des vestiges de l'Antiquité, qui exercent sur lui une attirance particulière, ce qui a pour conséquence textuelle la récurrence des descriptions des sites anciens. La manière dont il se rapporte aux vestiges fait de lui un révélateur du passé, dont il veut préserver la mémoire des traces. Et il convient à ce point de faire remarquer le fait que l'auteur a une perception esthétique par rapport aux ruines, utilisant une gamme très variée d'épithètes: elles sont « élégantes », « compliquées et vastes », « splendides », « grandioses », « en liberté », « désertes, noirâtres, pulvérisées », « les meilleures des ruines possibles », et l'on décèle également des associations tautologiques (« ruines ruinées ») et oxymoroniques (« pleines de magnifiques décadences »).

Le voyageur se donne donc à voir comme découvreur, comme révélateur d'un lieu magnifique, caché, enterré sous les sables et sous les siècles. S. Venayre insiste sur cette idée que Du Camp illustre merveilleusement en tant que voyageur: dans l'histoire culturelle du voyage, l'espace dont il est question est d'abord **un espace ressenti**³. Dans la constitution d'un *discours de l'espace*, fait de descriptions, organisations, commentaires, explications, arguments, divagations, etc., les images et les cartes livrées par le monde savant ont joué un rôle très grand. Elles ont perpétué des représentations particulières qui ont fondé l'imaginaire pauvre et/ou riche du lectorat⁴.

La terre étrangère et la ville-maîtresse sont un premier type d'espace que le voyageur découvre émerveillé, s'approprie, par le visuel d'abord, comme il le fait dans les premières lignes de son livre *Egypte et Nubie*. Il situe l'espace aperçu, observe d'abord les monuments célèbres qui l'habillent. La description que Du Camp fait rappelle le travelling cinématographique:

Au niveau de la mer s'allongeait un rivage d'un gris sombre,
au milieu duquel s'arrondissait en brillant un dôme vitré du palais

² Les mots qui ferment le *Voyage en Orient* sont plus précisément : « [...] bien triste quant à moi, de toucher à la fin de cet Orient pour lequel j'ai tant d'amour », p. 598.

³ S. Venayre, « Pour une histoire culturelle du voyage au XIX^e siècle », in *S & R*, n° 21/ avril 2006, p. 5-21, C'est nous qui soulignons en caractère gras.

⁴ *Voyage en Orient (1849-1851), Notes*, éd. Giovanni Bonaccorso, Messine, Peloritana, 1972, p. 9. L'auteur cite comme exemple les « taches blanches » à l'intérieur des continents, qui ont suscité des rêveries sur l'ailleurs.

du vice-roi. Près de là s'élançait une colonne très haute et qui semblait noire: c'était la colonne de Pompée; nous avions le cap droit sur Alexandrie. [...] Vers l'est on apercevait quelques verdure et dans l'ouest une plate, qui tranchait durement dans le bleu cru de la mer: c'était le désert libyque. [...] la rive se dessinait avec ses anfractuosités et ses mamelons de sable; la ville s'élevait peu à peu et nous montrait ses phares, son palais lourdement épaté sur la languette de terre nommé *Ras-Et-Tin* (le cap du figuier), ses casernes noirâtres construites en limon du Nil, ses fortifications où quelques maigres canons tendaient leur cou dans les embrassures, les minarets bulbeux de ses mosquées, ses maisons à terrasses, sa douane, son arsenal, les navires de toutes nations qui remplissaient ses bassins [...], et tout au fond, dans la ville, un pavillon tricolore flottant au mât du consulat de France pour annoncer notre arrivée⁵.

L'espace des vestiges anciens, d'une grande importance historique, qui attendent depuis des siècles à être dévoilés et étudiés, devient pour l'auteur un espace à découvrir, sur lequel il se considère comme responsable à jeter de la lumière. En décrivant les monuments de Thèbes, par exemple, l'écrivain reconstruit l'espace pièce par pièce, en le dégagant des parasites présents qui encombrant sa relation au passé, de manière que l'écart temporel est presque anéanti:

Il suffit de gratter la terre pour retrouver des fragments de monuments. À chaque pas, on aperçoit des blocs, des futs de colonnes, des angles de corniches, des architraves, des chapiteaux, des jambages de portes, qui essayent de soulever les couches de limon apportées tous les ans par le Nil. Il y a là des découvertes magnifiques à faire; voilà quinze cents ans qu'on remue, qu'on creuse et qu'on fouille les plaines de Thèbes, et c'est encore un pays vierge!⁶

La manière dont il décrit ces édifices confère parfois au passé un caractère d'immédiateté, étant une manière de donner à voir, de vivifier, de conserver le passé. L'usage des adverbes temporels renforce cette approche: «De belles couleurs bleues et blanches, fraîches, comme si on

⁵ Maxime Du Camp, *Egypte et Nubie*, Paris, Didier, 1868, p. 4-5.

⁶ Maxime Du Camp, *Le Nil*, Paris, Pillet fils aîné, 1854, p. 245.

venait de les appliquer aujourd'hui; on dirait qu'hier on travaillait encore, tant il est singulièrement bien conservé [...]»⁷

Par-dessus tout, Du Camp aime les temples. Dans *Egypte et Nubie*, il leur consacre beaucoup de pages: six longues pages pour les deux temples troglodytiques de la ville d'Ibsamboul, élevés par Ramsès; plus loin, cinq autres pour les temples de Maharakka et de Dakkeh; plus loin encore, deux autres pages pour le temple de Dandour, la fameuse « ruine ruinée »; les ruines des deux temples de l'ancienne ville *Apollinopolis magna* jouissent, elles aussi, de cinq larges pages d'analyse descriptive dans les moindres détails. C'est une occasion de plus de mettre en valeur son savoir encyclopédique dont il est si fier, fait de toutes les informations relatives au passé historique, à l'architecture, de tous les renvois mythologiques et légendaires, de connivences culturelles, de recommandations bibliophiles, etc. Le temple de Denderah, tout comme celui d'Esneh, retient l'attention du voyageur par ses ruines et ses magnifiques sculptures d'une décadence extrême. A Ibsamboul, il visite deux temples, le grand et le petit, taillés en pleine montagne de rochers. Suivent le temple de Sébona, celui de Dikkek, celui de Kirkeh – tous des spéos précédé des ruines. La visite du temple d'Isis s'étend elle aussi sur plusieurs pages.

Il est intéressant à noter que ces monuments constituent pour lui un *espace livresque*, qu'il se plaît à décrypter, à déchiffrer, à lire, tout comme un livre d'histoire, ainsi qu'il l'avoue lui-même: « tout se trouve, se reconnaît, se lit et se comprend sur les murailles de ces sépulcres »⁸. Il identifie des scènes militaires, sacerdotales et funéraires, des offrandes royales, des panégyries, des processions, des batailles, des jeux, des danses, des fêtes, des embaumements, des entretiens « étranges » dans lesquels les hommes parlent avec les dieux, des détails de navigation, d'astronomie, de mécanique, des inscriptions racontant les vertus des morts, des promesses de récompenses, des menaces de châtiments, etc. La comparaison de l'espace des monuments avec le domaine livresque, virtuel est évidente aussi lorsqu'il fait référence aux sculptures et peintures qui couvrent les parois des temples anciens, dont il affirme qu'ils sont moins des ornements que des « tables historiques » qui nous initient aux mœurs « intimes » des anciens Egyptiens:

⁷ *Ibidem*, p. 245.

⁸ *Ibidem*, p. 248.

Autrefois, on écrivait à coups de ciseau l'histoire sur les murailles âcres, comme maintenant on l'écrit dans les livres. Les « premier-Thèbes » sont à Karnak entaillés sur les colonnes en hiéroglyphes impérissables, et racontent les conquêtes de Sésostris comme, à cette heure les « premier-Paris » du moniteur racontent nos victoires d'Algérie.⁹

L'auteur, plongé dans l'histoire, dans le révolu que lui suggère les murailles des ruines, ne se lasse pas de contempler les pharaons « immobiles depuis des siècles, invoquant leurs dieux oubliés », d'admirer les grandes batailles « muettes » qui se déroulent sur les murailles devant ses yeux de voyageur averti, et qui confèrent aux ruines une dimension atemporelle. Aspect très intéressant, il est tellement ému devant le « spectacle » des ruines, qu'il semble être envahi par un « recueillement religieux » qui lui fait oublier le cadre apparemment hostile, désert où il se trouve, et qui représente pour le voyageur un spectacle visuel et sonore, un spectacle nocturne, mystérieux:

J'entendais le cri des oiseaux de nuit, qui se mêlait au bourdonnement des scarabées; les chouettes frôlaient mon visage de mes ailes silencieuses. Au-dessus de ma tête, à travers les plafonds bouleversés, je voyais le ciel qui se constellait de lumières; les miaulements criards d'une bande de chacals, qui galopaient dans les blés venaient jusqu'à moi.¹⁰

Au plan de la réalité immédiate saisie grâce aux perceptions auditives (les cris des oiseaux, etc.) et au plan du révolu s'ajoute parfois tout un imaginaire de l'espace: des « âmes errantes » qui flottent dans l'air et qui peuvent contribuer eux aussi à faire de cet endroit un vrai *locus amoenus*, qui semble être hors du temps: « Où trouveraient-elles donc, ces pauvres âmes errantes qui flottent dans les espaces, un ciel plus étoilé, de plus larges colonnades, des échos plus sonores, un silence plus profond, des images plus belles et un plus religieux recueillement? »¹¹

Le voyageur qui partage « fraternellement » l'espace des monuments anciens avec les animaux: les chouettes, les chacals, les scarabées, de même qu'avec les moineaux, les geskos et avec les « grosses fourmis

⁹ *Ibidem*, p. 110.

¹⁰ *Ibidem*, p. 228.

¹¹ *Le Nil, cited works*, p. 228.

noires », insiste sur le travail destructeur des hommes, qu'il perçoit comme une puissance nuisible, et qui, contrairement aux animaux, contribue à la détérioration des sites. Nous y voyons une tension ou une opposition qui traverse d'ailleurs la plupart de ses récits, entre le présent dérisoire, destructif, éphémère, et un passé dont la grandeur est à reconstruire à partir de ses traces.

Une brève analyse stylistique du texte qui décrit les ruines de Louqsor illustre d'une manière bien suggestive, à notre sens, ce contraste. On plonge dans le temps d'Aménophis-Memnon, de la dix-huitième dynastie et de Ramsès-Sésostris dont les victoires sont représentées par des sculptures « encore visibles ». Le voyageur est sensible à des traits esthétiques: « la finesse et la beauté de ces hiéroglyphes sont extrêmes »; la métaphore est une composante significative: les colonnes s'évasent comme « une fleur de lotus épanouie », le sable est tel que le « flux d'une marée », les massifs de la maçonnerie semblent être « des ailes gigantesques ». Le champ sémantique de la grandeur déploie toutes ses possibilités: piédestal « immense », ailes « gigantesques », « énormes » massifs, colosses de granit, « larges » architraves, qui font ressortir la petitesse des hommes. On y identifie aussi des personnifications: le monument devient vivant; l'obélisque semble « seul et désolé », regrettant « son frère absent ». Inversement, le vivant se métamorphose en monument: le vautour fatigué paraît « une statue d'oiseau sur un piédestal ». Tout le fragment illustre le degré auquel l'auteur valorise ces édifices anciens dont la beauté et la grandeur sont encore impressionnantes, en dépit de l'action nuisible des hommes, qui se sont emparés de la grande cour royale d'autrefois, « l'ont morcelée, coupée de refends, abîmée, enfumée, et rendue méconnaissable » et dont les poules, les poussins, les chiens, les pigeons « gloussent, picorent, aboient, et volent dans les chambres de Sésostris »:

Devant deux pylônes éventrés, couverts de sculptures encore visibles, représentant les combats et les victoires du pharaon Ramsès le Grand, s'élance un obélisque en granit rose qui semble, seul et désolé sous l'implacable soleil, regretter son frère absent. La finesse et la beauté de ces hiéroglyphes sont extrêmes, et ils sont assez profondément creusés dans la pierre polie et poncée pour que des enfants puissent grimper jusqu'au pyramidion, en entrant leurs pieds nus dans les entailles. Souvent j'ai vu un vautour fatigué dormir sur le faite, qui paraissait alors le piédestal immense d'une statue d'oiseau. C'est Ramsès qui le dédia à Ammon-Ra, roi des dieux. Des colosses de

granit, disparus jusqu'à la poitrine, s'adossent aux pylônes; maintenant on attache à leurs vastes oreilles la bride des ânes et des chevaux.¹²

L'auteur fait souvent remarquer ce mouvement dévastateur, ce travail de sape, effectué insensiblement par l'écoulement du temps et entrepris brutalement par les hommes, tout en insistant sur l'acte volontaire de la destruction et sur ses opérations distinctes. Il semble être séduit par la ruine en tant qu'objet: un objet réalisé par destruction, « par négation », un « contre-objet », dans les termes de Marta Caraion¹³. Ainsi, va-t-il signaler toutes les formes de la destruction, comme pour comprendre cette action du point de vue physique. Il emploie tout un vocabulaire de la détérioration, qui va jusqu'à la tautologie (« ruine ruinée »), avec une précision presque technique, réitérant textuellement le travail de déconstruction des hommes:

Je ne sais quelle armée de barbares, passant sur les bords du Nil, s'est abattue sur ce monument et l'a mis à sac. C'est une ruine ruinée. Les plafonds écroules obstruent les salles ou s'amoncellent les chapiteaux tombés, les colonnes renversées, les piliers jetés bas. Partout, sur les murailles, sur les portes, sur les corniches, sur les pylônes, sur les architraves, sur les entablements, dans le sanctuaire, on reconnaît la trace du fer, des marteaux et des pics; on a descellé les assises, bouleversé les escaliers, brisé les autels, martelé les inscriptions, pulvérisé les statues, gratté les peintures et comblé les souterrains. [...] Tout édifice est détruit, saccagé, **mais debout et encore et superbe** sous le ciel bleu.¹⁴

Étrangement, la description devient-elle une manière par laquelle le voyageur fait voir, refait, reconstruit, remonte pièce par pièce l'ouvrage démonté, qui est « debout et superbe », tel qu'il était avant le déchaînement des hommes. Cette dialectique de la *destruction-conservation* se retrouve dans son récit de voyage comme une façon de garder la mémoire des ruines.

¹² *Ibidem*, p. 212.

¹³ Marta Carion, « Littérature et photographie orientaliste ou la mémoire égyptienne de Maxime Du Camp » dans *Romantisme. Revue du XIX^e siècle*, no. 120, Sèdes, 2003, p. 60.

¹⁴ *Le Nil, op.cit.*, p. 161. C'est nous qui soulignons.

D'autres édifices qui suscitent son admiration sans bornes sont *les mosquées*. Les visites des mosquées du sultan Haçan et d'El Touloun en Egypte finissent par des constats laudatifs: la première jouit même d'une large description redondante par endroits d'où il ne manque les détails sur les faits historiques qu'elle a abrités, la seconde est considérée comme une beauté accomplie de l'islamisme. Ce sont deux chères ruines qui attendrissent le voyageur qui critique la politique déshonorante. Toujours en Egypte – pays fait de « deux rives de fleuves prises entre deux déserts »¹⁵, il en voit nombreuses qui ne sont pas toutes délabrées, telles que les mosquées de: SettiZéineb, d'El Mohaiët, de Morostan, de Haaneih, d'El Azar, d'Amrou. Le visiteur ne se contente pas seulement de les nommer, il réserve à chacune un ou deux paragraphes où il les décrit sommairement tout en mentionnant un détail particulièrement significatif relatif à son état architectural ou à son histoire mouvementée. La mosquée d'Amr suscite les regrets du voyageur de voir délabrés des vestiges importants jadis. Là où il y a de la mort, il y a également l'espoir d'une renaissance, d'une vie à recommencer même si ce n'est que pour les autres règnes que celui l'humain. En temps de famine ou de peste, même si elle est désaffectée, elle sert de refuge aux croyants:

On y entre comme dans une ville abandonnée; les scorpions remuent entre les pierres; les couleuvres s'y chauffent au soleil; les hirondelles ont maçonné leurs nids sous les débris de la toiture. La fontaine aux ablutions s'est écroulée; sur les dalles soulevées des galeries, il n'y a ni nattes, ni tapis; des colonnes sont tombées, d'autres se sont fendues, la plupart oscillent de vieillesse¹⁶.

Fasciné par les ruines, elles feront également l'objectif de ses premières visites dans l'Île de Capri. Les ruines du Palais de Tibère, avec leurs douze villas, sont une nouvelle occasion pour Du Camp de décrire amplement le spectacle de la destruction des « ruines des ruines », des ruines « muettes » tout en faisant appel au modèle Chateaubriand (c'est-à-dire en identifiant la ruine seulement à l'aide des historiens et des renseignements fournis par les guides et non pas grâce aux traces existantes). Sur les traces de Tibère, tout en commentant les supplices des condamnés antiques, il continue par les ruines d'un phare, d'arcades, etc. Du Camp procède par suppositions à partir de généralisations, de

¹⁵ *Ibidem*, p. 57.

¹⁶ *Egypte et Nubie, cited works.*, p. 48 et 49.

déductions et d'extrapolations. Il reste équidistant par rapport à toutes ses sources d'informations et insiste sur cet aspect-là. Il reconfigure les constructions originelles des ruines de l'Île de Capri, caractérisée en outre par la présence de beaucoup de ruines, y compris à partir de l'imagination. Ces lieux mis en évidence par l'emphase du présentatif, sont marqués par la grande figure historique de l'empereur romain présent dans les légendes, les toponymes, les ruines apparentées à son nom.

Ainsi, une dialectique identifiable dans les récits de voyage de Du Camp, est la dialectique *présent-passé*, que nous avons illustré lorsque nous avons analysé la manière dont l'auteur révèle, déchiffre, « lit », fait voir, vivifie les édifices anciens à présent. C'est un type de représentation qui est retrouvable dans la manière dont le voyageur s'approprie l'espace: elle repose sur le paradigme de l'atemporalité (la grandeur et l'immobilité des monuments) opposé à celui de l'éphémère de la condition humaine.

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PERSONAL DEVELOPMENT, PROFESSIONAL COMPETENCE AND UNIVERSITY PERFORMANCE – WHO DOES WHAT?

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Abstract: *Universities are organizations that have to face their own challenges. This is obviously true of any organization. However in some higher education contexts universities continue to be expected to know the answers to those challenges as they are made up of experts in many fields, including leadership, management and organizational performance. There is a relatively rich literature documenting issues related to universities as organizations and the way they can address those challenges. There is also an understanding of the fact that higher education evolves through its institutions, practices and processes at some paces in global contexts and at different ones in local contexts in spite of a relatively unifying public discourse.*

The present paper focuses on the way universities address the need for personal development of the leaders and/or managers of the various university hierarchies in order to contribute to the overall performance of the organization with a focus on Romanian economic and business higher education institutions. The research presented here evolved from a doctoral study one of the author did in the field of leadership in Romanian higher education and from both authors personal experiences in the university system in Romania and in other systems they visited.

The claim put forward and documented in this research is that little is done in terms of formalized, transparent and open access training for university leaders and administrators in Romania or for those who are interested in following such a career path. In today's complex higher education system professional competence

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is an important component that cannot be left entirely to personal development needs. Formalized training in management, leadership, educational management, research management, organizational culture, strategic planning and time management skills are critical components for one's professional competence that would empower those academics working in administration to plan for their organization's performance in an open and transparent world.

Keywords: *higher education, academic leadership/management, personal development, professional competence, university performance.*

1. Introduction

Views on higher education and its merits for today's society tend to become more nuanced and definitely polarized. In an August 2016 article in the Financial Times the author, an Oxford graduate, looks at two main and opposite views on higher education: higher education is good and desirable and needs more investment, on the one hand, and higher education is not offering anything of real value to graduates and therefore does not justify the increasing number of universities, on the other.

An economics professor¹ points out – not unreasonably – that many students seem to learn nothing of any obvious relevance to the workplace but, on graduation, they are rewarded with much better career prospects than non-graduates. He explains the situation underlining that education is a signal for otherwise difficult to evaluate but much needed character components and skills for the workplace that most applicants claim they have. Such as discipline, meeting deadlines, ability to work under pressure, critical and creative thinking, good team player, communication skills, etc. The author explains that the value of undergraduate degrees for society consists in streamlining graduates, in becoming a gatekeeper to higher salaries, therefore not in their intrinsic worth, concluding that, possibly, the world might become better if it gave up on creating more universities or heavily investing in the old ones.

In Romania we do not have this problem yet. We do have others, nevertheless, and plenty of them. In Romania education is still perceived as a highly desirable personal and social accolade in which, however, only

¹ Bryan Caplan, *The Case Against Education*, apud Tim Harford, *Are universities worth it?*, in Financial Times, August 2016, <https://www.ft.com/content/f1cae73c-6982-11e6-ae5b-a7cc5dd5a28c>

individuals need to invest possibly because in the naïve and simplistic view of the Romanian decision and policy-makers education benefits the individual. The Romanian decision-makers, no matter of their political allegiance, seem to be unaware of the fact that higher education evolves through individuals and only then through its institutions, practices and processes and needs both financial investments and societal support through a public discourse that no longer incriminates and demonizes the education system for almost all the failures of the post-communist Romanian society. True, the public discourse in Romania is connected to and pays lip service to the international conversations related to higher education, but our reality in Romania has a different quality and our understanding of concepts is heavily indebted to our context and history.

2. Training leaders in the romanian higher education

The highly competitive international market of higher education makes life difficult for universities in emerging economies, in countries like Romania. The globalization of education has increased the perceived competitiveness of European institutions of higher education compared with other parts of the world and as such of the member states of the European Union (EU). Even if Romania is among the last in the EU in terms of comparable indicators it is still considered as a desirable study destination for lower income categories of people coming from the Middle East or Asia Pacific and not only². Why is that? Obviously, one important reason is that the country is part of the EU being one of its large countries, with important resources including human capital. The various policies implemented in the last decade at the national level transformed the country which is now aligned institutionally to the requirements of the latest EU regulations. In terms of higher education this means that Romanian universities have similar standards in terms of study programmes, quality assurance and transferable credits. However, the values of the academic community in Romania are still under a strong public debate which is not helped at all by the many changes the system is still going through. As at the date of the writing of this paper the criteria for evaluating professors, readers and doctoral coordinators are, again, under heated public discussion. The reason is that the new criteria perceived as more connected to the requirements of the international

² Ed Holt, *Medical students drawn to eastern Europe*,
[http://www.thelancet.com/pdfs/journals/lancet/PIIS0140-6736\(13\)62025-5.pdf](http://www.thelancet.com/pdfs/journals/lancet/PIIS0140-6736(13)62025-5.pdf)

research community has, in certain field/disciplines, an almost devastating effect on academics. As members of the academic community of our university said in open letters to the ministry of education during the public debate of the new criteria those criteria in the field of economics and business almost represent the termination of teaching in universities and of the Romanian research journals with yet not entirely perceivable effects on the entire Romanian society. At individual levels they represent enormous efforts that have no consequences career-wise and continue to make the academic career an unattractive and unpalatable perspective for young graduates. The most important, however, point that the communities of economic and business academics are making is the lack of coherence and preparation of the process of desired change. This is clearly a function of the leaders of the education system and, mainly, of the Romanian government who should have a long term vision of the development of the country and of the road to that development which clearly should be based on education³. That this does not happen may be, among others, also a proof of the incapacity of those leaders to articulate a clear vision and, mainly, to be able to drive their constituencies to follow that vision and implement it. Such a vision and an understanding of the international values of higher education and of the local social needs would help Romanian universities to serve their markets, the present Romanian society and our future generations of graduates.

So how are the leaders of higher education trained or grown or developed in Romanian universities? It is not easy to answer such a question due to the lack of transparency of the ways each university approaches this question. An investigation on the web sites of Romanian universities, a relatively time-consuming effort due to the unfriendly structuring of information presented, shows that little is done in terms of formalized, transparent and open access training for university leaders and administrators in Romania or for those who are interested in following such a career path. As compared to, for example, American or Australian universities in which you have a clear career path explained for those interested in academia.

For example The Graduate School of Education from Harvard University offers for a tuition fee of \$8,150 a five day programme for

³ The role of education in the development of societies has been well-researched and covered. For a larger discussion see Nicolae, M., *Education and Leadership. Romanian Realities*, ASE Publishing House, 2014, pp. 29-31.

“Newly Appointed First-Year Presidents”. Through interactive sessions the programme promises to address important issues for those who have become university presidents for the first time. The programme covers, among others: the *contexts of leadership* -that is the culture and traditions of a university; *governance*- the role of governing boards and the relation between the president and the board of trustees; *presidential fundraising*- which is probably the most important role for the president of an American university; *building the administrative team* -the role of the president as CEO and senior personnel officer; *academic leadership*- the position of the president as academic leader; *strategic planning*- the president’s role in the design and implementation of strategic planning⁴.

It is obvious that such programmes are not possible in the Romanian academic context for various reasons, including the costs of developing them and the culture of delivering them. So mostly the training of the leaders in higher education has been left to personal efforts, especially at the higher end of the system. In today’s complex higher education system professional competence is an important component that cannot be left entirely to personal development needs. Formalized training in management, leadership, educational management, research management, organizational culture, strategic planning and time management skills are critical components for one’s professional competence that would empower those academics working in administration to plan for their organization’s performance in an open and transparent world.

In a doctoral research aiming to reveal the specificity of Romanian leadership issues in higher education one of the authors of the present paper administered a questionnaire to a number of leaders in Romanian and international universities. Among the questions asked were the following: (1) Do you feel the need for specialized courses to develop leadership competences in HE? (2) If not, why not?(3) If you do, what are the three crucial competences that should be covered in those courses?

The answers were complex and difficult to analyze. However, for the purpose of the present paper it is interesting to underline that question number one, referring to the need for specialized courses to develop leadership competences in HE, was answered positively by the overwhelming majority of the respondents. More details on the research and a larger discussion of the issues only briefly presented here can be

⁴ <https://www.gse.harvard.edu/ppe/program/harvard-seminar-new-presidents>

found in Nicolae, M., (2014, pp179 - 189). The type of competences considered necessary to be developed or improved in the training revealed in the answers of the Romanian respondents ranged from disciplines to be studied such as human resource management, strategic management and leadership in HE, educational management, research management, organizational culture, strategic planning to competences efficiency, adaptability, flexibility, holistic thinking and, under various forms, time management skills. The emphasis on disciplines is a cultural characteristic for Romania where learning is still perceived to happen if one can prove that one has the official record that one attended the respective training, not if one can demonstrate the competence irrespective how that was acquired. However, the main conclusion is that if in Romania new leaders are trained in a diffuse manner, across departments and disciplines, with little mentoring, or are left to do their own professional development, which has been mostly the case so far, in all the international universities that were part of the above mentioned research leadership training is well established and done either by the human resource departments or by specialized, dedicated departments.

3. Conclusion

Higher education is clearly one of the important drivers of development in a knowledge intensive society and economy. Romania, as a decade-old member state of the European Union, needs to continue its efforts to meaningfully contribute to the EU and to the complex process of the transformation of Europe. Romania could be successful if it finalizes its continuous reforms of its higher education system by rethinking its education and research priorities, by integrating itself in the main flow of thinking and good practices of international leadership today, including formalized training and development, and by giving itself and its people the time to internalize values and good practices.

Therefore the answers to the questions raised in the title of this paper are, sadly, that individuals are still requested to do most of their own development, with still little institutional support, while the organizations appropriate those efforts and quantify them as their own.

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THE ADULT LEARNING PROCESS IN ROMANIA

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Abstract: „The study provides an overview of tendencies and contradictions in lifelong learning and adult education in Romania in order to understand the present practices in Romanian adult education. The particular slant on lifelong learning in different countries depends on their history and traditions and on the current social, political and economic context. For the past 20 years, Romania has been in a period of transition from a post-communist to a market-based and democratic society. This has brought new challenges to education, including adult education. Romania is a country which introduced new general economic reforms and joined the European Union. Adult education policy in Romania has been influenced by the direction of social, economic and political change in the European Union; it has also been affected by the need to consider EU directives, European policies and trends in the European educational area. This study focuses on adult education in Romania by analysing strategic documents concerning lifelong learning and adult education policy and statistical data concerning participation in lifelong learning activities.”

Keywords: principles, lifelong learning, adult age, Arges, Romania, social change.

Introduction

Education as a whole has changed in Romania during the last 20 years, and this has had a great impact on the development of adult education. Romania is a small country. As at 1 January 2011 the Romanian population was 1,340,194 people (Statistical Yearbook of Romania, 2011). In 2009, 68.6% of the population in Romania were Romanians. During the past decade, Romania has become a member of the European Union and NATO.

Since joining the European Union in 2004, Romania's social, political, educational and economic objectives reflect the pursuits of the entire

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European Union. However, regardless of the influences from the European Union and other countries, Romania has been able to preserve and strengthen its national identity; we have also maintained our cultural peculiarity as a bilingual community and multicultural society and the possibility of obtaining an education in both Romanian¹.

Since the beginning of the 1990s, the Romanian education system has been forced to cope with great changes in society, such as adjusting to a market-based economy and political pluralism; moreover, the entire education system has been restructured. Romania's transition to a market economy and the economic restructuring in the 1990s considerably increased unemployment and the risk of unemployment. Education became a means of rising to a higher social group and entering the economic and political elite. During the period of rapid economic reforms the impact of education on employment was remarkable. At the end of the 1990s, when fee-paying educational institutions and private universities were established, the availability of and opportunities for obtaining academic education improved noticeably. At the start of this millennium, academic education in Romania meant better opportunities and position in the labour market, including better wages². Changes in Romanian society have also contributed to the fact that education has become a means for determining social status. At the end of the 1990s and beginning of the twenty-first century, education in Romania played a differentiating and selective role rather than an equalising and integrating role.

The stratification of society based on social and educational capital has continued to increase. Furthermore, prognoses by the Romanian Institute for Future Studies and the Romanian Human Development Reports indicate that stratification and selectiveness will continue to prevail in Romanian society in the future.

Changes occurred in all areas of the Romanian education system in 2000–2010: in educational policy, funding, the administration and management of education, in the system and network of educational institutions and in curricula at all educational levels. Education policy and the education system in Romania have been greatly influenced by societal changes; the social, economic and political situation is different as Romania has become a democratic society.

¹ Neculau, Adrian, *Adult education. Romanian experiences*. Iasi: Polirom, 2004, 183-185

² Field, J., *Lifelong Learning and the New Educational Order*, London: Trentham Books, 2004, 120-122.

The period from 1991 to 2004 may be characterised as a period of educational expansion, and the years 2004 to 2010 as a period of expansion in higher education. Educational opportunities increased and diversified, enrolment in higher education institutions was simplified and the educational level of Romanians improved remarkably. In comparison with the EU average, the proportion of the population with low-level qualifications in Romania is quite small (11%). For tertiary education, the percentage of the population aged 25–64 with higher education was higher than in most of the EU member states in 2007. Most adults already have tertiary education (35% of 15- to 64-year-olds in 2008 had higher education; 31% had vocational education) (Romanian Human Development Report, 2009). The indicators of formal education obtained by the Romanian population are considerably higher than the EU average³, but much depends on how this educational potential is used in society.

The concept of lifelong learning came into active use in Romanian educational policy after 1996, which was designated by the Council of Ministers and the European Parliament as the European Year of Lifelong Learning. Its use continued after discussion of the memorandum on lifelong learning – Making a European Area of Lifelong Learning a Reality – drafted and adopted by the European Council and Lisbon European Union Conclusions, in which it is pointed out that lifelong learning is an important precondition for a successful transition to a knowledge-based economy and society.

EU lifelong learning policies have had a major influence on understanding the concept and terminology of lifelong learning. Since Romania became a member of the European Union in 2004, the development of adult learning and education has become one of the main priorities of educational policy. Its importance is defined in documents and laws regulating the national education systems, as well as in Strategies for Lifelong Learning in Romania 2005–2008 and the Development Plan for Romanian Adult Education 2009–2013, which devote considerable attention to the development of adult education in the context of lifelong learning (Romanian Lifelong Learning Strategy 2005–2008; Development Plan for Romanian Adult Education 2009–2013).

Education – the supreme social function – is ‘caught’ between ‘two fires’, two kinds of society, at the turn of the millennia. Evermore placed in

³ Broek, S., Buiskool, J. and Hake, B., ‘Impact of ongoing reforms in education and training on the adult learning sector’, 2010, 254–255.

the thin borderline between stability and change, between preservation and innovation, education is experiencing unprecedented tensions. Indeed, educational systems are a mirror of all the contradictions that confront our modern societies.

The article is based on the international research project 'Impact of ongoing reforms in education and training on the adult learning sector', which was carried out by Research voor Beleid in partnership with the University of Leiden in 2009–2010, and financed by the European Commission Directorate-General for Education and Culture (EAC/15/2009). The aim of this international study was to provide a thorough analysis of ongoing developments, reforms and modernisation in the adult learning sector in the 32 countries participating in the Education and Training 2010 process.

In this article I also use results from a national case study⁴ and selected qualitative data from 14 educational expert interviews¹ collected in 2008 in the context of a Finnish–Romanian research project, *Education in Romania and Finland and Changes in the Educational Policy of the European Union, 1990–2000*. The aim of this research was to analyse the effects of the supranational policy of education on the educational policy systems of Finland and Romania. Education experts were selected on the basis of their professional experience (more than 10 years' experience in adult education policy), position in the field and their influence on strategic decision making. Empirical data was analysed using inductive analysis. The results from studies are interpretatively synthesised in this article.

The aim of this article to provide an overview of current tendencies and contradictions in lifelong learning and adult education policy in Romania in order to understand the present practices of Romanian adult education. There is also a theoretical and practical need to understand how these policies are implemented.

First in this article the historical background to the development of adult education in Romania will be briefly described. Secondly, general tendencies in adult education for 1991–2010 will be presented. Thirdly, the aims and priorities of lifelong learning strategies and adult education policy will be discussed. The article concludes by identifying some contradictions in lifelong learning policy and adult education practice in Romania.

⁴ Jõgi, L. and Gross, M., *Country Study. Romanian National Report*. Tallinn: Tallinn University, 2010, 124.

Adult education in Romania: tendencies 1991–2010

Adult education and training in Romania have strong traditions based on difficult periods in the history of Romanian society. During the communist period the education system was primarily centralised. All educational programmes for adults were supervised and accredited by the Ministry of Education the Bucharest. In the 1970s, several methodological and training centres for adults were established in Romania. From the mid-1980s (communist era) and then from 1991, wider reforms in the education system in Romania influenced adult education. Special attention was paid to in-service training and continuing education for civil servants, teachers and those with good and low levels of education.

After analysing the situation in adult education and training in Romania for 1991–2000 (Romanian Human Development Report) it is possible to highlight the following general tendencies:

1991–2004: Growing international cooperation in the field of adult education, an increased role for non-government organisations in adult education, enhanced learning and educational opportunities at formal, non-formal and informal levels of adult education, growth in the number of adult continuing education and training centres in Romanian counties and larger cities, increased learning opportunities in university adult education, academic programmes at Open Universities attracting well-paid people, growth in adult participation in educational courses and continuing training. The Adult Education Act was approved in 1993 and updated in 1998, 1999 and 2002. The Adult Education Act established legal guarantees and stipulated the right of every person to lifelong learning throughout his or her life cycle and set out the obligations of both central and local government and of employers in the coordination and implementation of adult education, and the financing of adult education from the national budget. The Act confirmed the principles of the legislative framework for adult education and learning in Romania. The state only finances the implementation of the national priorities in adult education that have been approved by the Ministry of Education of the Romania. Training is generally paid for by the people themselves, rarely by local governments or employers.

The adult educator as a profession has been recognised and regulated by the Professional Qualification Standard in Romania since 2004. The Adult Educator/ Andragogue professional standard can be applied at four levels (levels II, III, IV, and V). Since 2007, the professional standard is competence-based, and this has significantly influenced the preparation of

applicants for a qualification standard⁵.

Participants in training and lifelong learning activities are usually people with better education and higher educational levels. Educational stratification is increasing and opportunities for obtaining an education have mainly deteriorated for those who lack the necessary resources: a good education, status, labour market position, money, time, motivation; thus, the risk of unemployment in certain population groups keeps rising. The number of participants in lifelong learning is consistently low: in 1997 4.3%; in 2000 6.3%; in 2004 6.5% (Statistics Romania, 2009), which is nearly twice as low as the European Union average (Europe in Figures, 2007). At the same time, education is highly valued by the Romanian society and people.

2004–2010: The training market offers a large number of different courses for adults: with the support of the Romanian Government and European Structural Funds (since 2007), diverse opportunities have been created for obtaining free training, including retraining and additional training for the unemployed, people with lower positions and people with special needs. Until 2007, the participation rate in lifelong learning remained 6–7%, but in 2007 the indicator increased to 9.8%. In 2009, participation in lifelong learning rose to 10.9% (Statistics Romania, 2009). This change can be explained by the fact that in 2008 the Romanian Ministry of Education, approved a model for funding adult professional training, which proceeds from responsibility-based distribution. Pursuant to this model the Ministry of Social Affairs funds the training of the unemployed and risk groups in the labour market; the Ministry of Economic Affairs and Communications supports companies that wish to train their employees; and the Ministry of Education and Research coordinates continuing training and retraining through training and educational institutions (Romanian Lifelong Learning Strategy 2005–2008). The implementation of the responsibility-based distribution model and extensive opportunities created with the help of EU structural aid in 2007–2010, as well as free training for risk groups and the unemployed, boosted the number of participants in lifelong learning (The Development Plan 2009–2013; Jõgi and Gross, 2010)

Participation in adult education

Participation should be considered an important indicator of the quality of lifelong learning in society and of the quality of individual

⁵ Roodla, L. and Jääger, T., 'Elukestev õpe müütide võrgus', Haridus, 2008, 93–96.

motivation. However, participation also deals with the processes that cause people to participate in organised training situations. The country's financing models for adult education have favoured certain occupational categories, such as teachers and public officials. Despite the fact that provision for training the unemployed has also been prioritised, the demand for training remains many times greater than the supply of training opportunities in the case of the unemployed (Romanian Human Development Report, 2009). However, the funding model does not encompass all the target groups for adult education or non-formal adult education; for instance compared to Finland the funding of non-formal education is scarce⁶.

Adults who have difficulty participating in learning are the elderly, men, people with lower levels of education, adults who are working in low-skilled positions, the unemployed, adults living in rural areas and foreigners who do not speak Romanian (Statistics Romania, 2009). During the economic crisis (2009–2010), the inequality between the participation rates of different groups presumably increased, resulting in a situation where training was not available to those who would most benefit from it in the adverse economic conditions – less qualified workers and the unemployed as well as people who had given up looking for a job (Statistics Romania, 2011).

The reasons for non-participation are complex. The most frequent reasons for low participation in lifelong learning activities are: unwillingness to return to school; cost of studies; believing that one is too old to learn.

The study made by the Institute of Education Sciences (Romanian Human Development Report, 2009) shows that institutional barriers dominate. Such reasons as training opportunities being too expensive (30.8% of people who had not participated in learning in the past year); there being no training opportunities near the place of residence (22.2%); and access criteria being too high or difficult (8.3%).

Situational barriers such as being too old (38.1%) or health problems (19.2%) were also mentioned as reasons for not participating. The most common reasons for not participating were that people did not feel the need to learn for their job (47.7%) or for personal life (49.5%) as well as not wanting to return to education (47%). This last is a dispositional barrier

⁶ Jõgi, L., Jääger, T., Rinne, R., Leppänen, R., Korppas, M. and Klemelä, K. (eds), *Eesti ja Soome haridus ning muutused Euroopa Liidu hariduspoliitikas*, 2008, 162-165.

and indicates that learning and studying is not seen as relevant in those people's lives. A great number of reasons could be seen as personal barriers, such as: people having no interest (25.7%) or not being able to find a training course that interests them (10%); 6% thought learning had no benefit⁷.

Participation in lifelong learning has increased in all groups of society, but older people and people with a lower level of education still participate in learning less than younger people and those with higher levels of education; the participation rate for other ethnicities is lower than that of Romanians.

In addition, there are factors affecting particular groups – low-skilled, part-qualified, unemployed, people with low motivation and other ethnicities. On a personal level, barriers to participation and learning are related to the inner motivation to learn and to the work environment and job, which will not motivate people to learn. Restoring the aptitude to participate and learn and increasing the inner motivation to learn will often take a long time and requires macro-level and long-term strategies with a strong focus on personal barriers.

Development of strategic goals in adult education policy

The significance of lifelong learning has not been questioned, but the direction that society takes in support of learning opportunities is important⁸. During the 1990s, the policy of adult education and adult learning in Romania focused on the readiness for change and lifelong learning. The education policy of the 1990s prioritised higher and general education, but reflected the lack of awareness of the role of adult and vocational education in influencing social processes and as active labour market measures. Attention to and resources for vocational education have gradually increased since 1998, and vocational education reform has been initiated, focusing on the diversification, rearrangement and improvement of the vocational education system, on counselling students and developing flexible financing mechanisms, and on decentralised management that would include social partners. Romanian education policy – the formulation and approval of the relevant Education Act and

⁷ Nurmela, K., 'Täiskasvanuhariduses mitteosalemise põhjused', Riigikogu Toimetised (20), 2009, 200-202.

⁸ Jarvis, P., 'Beyond the learning society: globalization and moral imperative for reflective social change', International Journal of Lifelong Education, vol. 25(3), 2006, 201-211.

development plans – is based on the cooperation of various interest groups and social partners, and remains in the competence of the Ministry of Education from Romania. The development of education policy is coordinated by the Romanian Ministry of Education and Research.

The main directions and goals of adult education policy are determined in several strategic documents and are primarily aimed at the professional training of adults, as well as their access to educational opportunities (Jögi et al, 2008).

National priorities in adult education for 2004–2006

National Priorities in Adult Education for 2004–2006 focused on opportunities for adults to enter lifelong learning, including in the field of formal education, by creating opportunities for education system dropouts to return to the system. Other priorities focused on ensuring the quality of adult training, including vocational training and developing an adult education financing model, which included motivating companies to invest in training their employees (National Report, 2007; 2009).

Romanian lifelong learning strategy 2005–2008

Romanian Lifelong Learning Strategy 2005–2008 describes the principles and need for lifelong learning on a wider scale, but its goals, measures and activity plans focus on adult education (Lifelong Learning Strategy, 2005–2008). The general goal of the strategy is to increase the opportunities and motivation of the Romanian people to participate in both formal and informal studies in order to improve their knowledge and skills in line with their own needs. One of the most significant objectives of the Romanian Lifelong Learning Strategies 2005–2008, and one which will ensure lifelong learning, is the creation of adequate conditions both to increase the number of adults learning and to improve the quality of the activities taking place in educational establishments. The goal set by the Romanian Lifelong Learning Strategy 2005–2008 was partly fulfilled in 2008; statistics show that opportunities for participating or the readiness to participate in lifelong learning vary greatly according to different background indicators of the population (Development Plan for Romanian Adult Education, 2009–2013).

Development Plan for Romanian Adult Education 2009–2013

The Development Plan for Romanian Adult Education 2009–2013 is a continuation of the Lifelong Learning Strategy 2005–2008 and mainly

focuses on better access to education and learning activities. The general goal of the Development Plan is: to provide adults with better access to formal education and non-formal education in order to improve people's knowledge and the level of education of the population and to increase the percentage of people aged 25–64 participating in lifelong learning to 13.5% by 2013 (Development Plan for Romanian Adult Education, 2009–2013). The activities planned within the framework of the Development Plan are in accordance with the priorities of the *Romanian Action Plan for Growth and Jobs 2008–2011 for the implementation of the Lisbon Strategy*, the *National Strategy for the Use of Structural Funds 2007–2013* and the *Operational Programme for Human Resource Development 2007–2013*, as well as the Ministry of Education and Research development plan, *Smart and Active People*, approved by the Ministry of Education from Romania.

Until 2011, Romania lacked a coherent education strategy and consensus regarding the goals and vision of education; thus developments in adult education are linked to strategies and development and action plans that involve various areas. The Romanian Education Strategy was compiled in 2011.

The Five Challenges of Romanian Education – Romanian Education Strategy 2012–2020 is based on a three-way agreement concluded by the Romanian Cooperation Assembly, Romanian Education Forum and the Ministry of Education and Research. In light of the broad-based consensus education is defined broadly as 'the precondition for a happy life and the basis for cultural sustainability and societal interaction, which also helps the country's economic progress and develops our common human assets' The Five Challenges of Romanian Education. (Romanian Education Strategy 2012–2020).

The prevalence of professional training as an important goal in Romanian adult education policy is simultaneously a strength and a weakness, enforcing the idea that lifelong learning and study is only related to adjusting to and staying in the labour market. Most of the 14 educational experts who were interviewed for the comparative study of Finland and Romania, *Education in Romania and Finland and Changes in the Educational Policy of the European Union, 2006–2008* considered professional training to be an important measure for alleviating unemployment, but pointed out that the adult education policy in Romania has no clear philosophical or conceptual basis, the coordination of the policy was weak, it lacked coherence, and cooperation between social partners was insufficient. Education experts in Romania understood that adult

education was marginal, peripheral among educational problems ('something that should be dealt with'), hinting that among decision makers and officials there was a lack of deep understanding of lifelong learning and education, and it was mainly considered due to EU pressure (Paloş, Ramona, 2007).

My personal viewpoint is that there is no adult educational policy. It is something that everyone talks about exactly as they see fit. And as this policy has not been formulated clearly, we do not know how to feel a part of it. There is no comprehensive system and I believe that we, and our partners, would be ready to discuss what role we could fulfil in this policy if specific goals were established. Negotiations would then be held with the partners who could contribute to this system. However, as no such framework exists today, we do not feel included in it (Expert A).

But actually, in everyday situations, higher education, general education and vocational education are more important ... But when I look at how the state budget is discussed, then there is an attitude of 'let adults pay for themselves'. But at the same time, due to European Commission pressure, we have received a lot of money for the next period of adult education. It is something that should be dealt with (Expert B).

The experts are in favour of humanist adult education, but in the current context of a liberal adult education policy this is impossible because adult education is primarily oriented towards labour market needs.

The role of adult education is like it is, but it is foremost a bridge between the person and the labour market in my opinion. It is seen mainly like this: what might enable a person to achieve relevance in the changing labour market, in the changing situation. Certainly career success is stressed in Romania more than being a citizen or just being active, having a broader mind, social networks or things like that. It is mostly seen as a way for those who were trained long ago to be successful and have the right skills nowadays, and especially from the labour market aspect. Simply put, with the human-centred approach in adult education and policy you are not successful. This slogan is very successful in higher education where politicians and also officials will hit the table with their fist, that students must have the freedom to choose what they study. But when we start to talk about vocational education and adult education, then it must be according to labour market needs (Expert D).

It is frequently believed that the educational policies developed and implemented in various EU countries mainly prioritise national values and goals, and that supranational objectives are taken into account only as

secondary. This is also considered obvious when comparing education country by country. The Romanian survey results indicate that Romanian national educational models and goals have been influenced by supranational institutions for quite a while, and that since the 1990s their influence has clearly grown⁹.

Comparing developments and tendencies in adult education policy in the context of lifelong learning, it can be said that education policy in Romania has changed and strengthened, and the European aspect became more important and dominant during the years 2005 to 2008. For instance, the goals established in Romanian documents on educational policy are influenced by the educational policy of the European Union: the terms *globalisation, information society, quality management and assurance, quality areas, market, clients, results, auditing and efficiency* all originate from OECD sources. But little attention in education policy has been paid to personal barriers and supportive activities for participation.

The importance of the lifelong learning policy context

Social progress is a part of change processes. Social developments in a society must bring about changes, improvement, innovation, the diversification of relationships and the satisfaction of people's needs. Processes in the education system also display features of development and innovation: the irreversibility that guarantees the changes, the directedness that points to development tendencies, the pattern that is required in this particular process, the innovation that starts from an idea to change something or do something differently, and the result as a change. How can we create the preconditions for social processes and change in the educational context? Which social structures and preconditions together guarantee the availability of lifelong learning for everybody and the efficiency of society? Which goals do we need to establish to make the development processes successful? Should we concentrate on individuals' opportunities for life-wide and life-long learning? Or should we increase human capital in society or support the readiness to learn and help people to identify their learning needs or should we continue to support participation in lifelong learning activities¹⁰?

⁹ Aava, K., (2010), *Eesti Haridusdiskursuse analüüs*, Tallinn: Tallinna Ülikooli Kirjastus. Barthes, R., (2004), *Mütoloogiad*, Tallinn: Varrak, 83-85.

¹⁰ Delors, Jacques, (2000), "Treasure Within: Report to UNESCO of the International Commission for Education in the XXI century", Iasi: Polirom, 210-214.

Some issues are resolved in the various strategies immediately or after a delay, while some are never dealt with and some remain topical. The European Union's lifelong learning policy is based on the introduction and implementation of lifelong learning and the ideas of a knowledge-based society. The initial concept, which has been used to describe learning across ages, as a life course context, has lost its meaning or is used only in rhetorical discourse (Niemi, 2004). Researchers point out that the vision for lifelong learning became a dominant idea in the 1990s and continues to mean a prerequisite that influences economic developments and guarantees a qualified labour force and employment. The term 'lifelong learning' is suffering from linguistic 'hyperinflation' (Field, 2004) and has become 'planetspeak'. The concept of lifelong learning can be compared to a chameleon whose colours change according to its environment. The economic imperative is dominant in political and public discourse with the call for lifelong learning¹¹.

Such rhetoric and discourse as the development of a neo-liberal ideology is also discernible in the key goals and pursuits of the Romanian strategic documents on lifelong learning and the associated public discussion.

Economic competition is most important in Romania and this is where the values of adult education are developing. The greatest expectations in society are currently economic development, people value success and their own life more. Hopefully, people will soon realise that success goes hand in hand with education and education becomes equal to the economic aspect of learning (Expert L).

Analysis of the most important documents related to lifelong learning (Development Plan for Romanian Adult Education, 2009–2013; Romanian Lifelong Learning Strategy, 2005–2008) reveals that the economic imperative is also manifest in the goals, priorities and planned activities. There are more than 70 strategies and strategic documents from various areas where the term 'lifelong learning' is used in the economic context, but their content is not associated with development processes, innovation or problems in the social sphere, economy and education.

Larissa Jõgi (2012) recommended that we observe how we speak about phenomena that help differentiate between the importance, effect and reality of the content both during the analysis and decision-making

¹¹ Larissa Jõgi, *Understanding lifelong learning and adult education policy in Estonia: Tendencies and contradictions*, Journal of Adult and Continuing Education, vol. 18, 2012.

process and in the results. Are goals, priorities and concepts real, logical objectives or dream-like and unrealistic illusions, utopian beliefs or typical or even contradictory phrases that only include the agendas of certain interest groups? Which features of a concept or model are manifest in strategic documents about lifelong learning? What content do the strategic goals and priorities convey?

The theoretical viewpoints behind this article are based on those of (2006). Larissa Jõgi described and distinguished four models of lifelong learning (2012).

(b) *Lifelong learning for all*. An emancipatory or social justice model which pushes the notion of equality of opportunity and life chances through education.

(c) *Lifelong learning for self-fulfilment*. A cultural model where lifelong learning is a process of individuals' life itself, aiming at the fulfilment of life and self-realisation.

(d) *Lifelong learning for all who want and are able to participate*. An open society model in which lifelong learning is seen as an adequate learning system for developed, multicultural and democratic countries.

(e) *Lifelong learning for employment*. A human capital model where lifelong learning connotes continuous work-related training and skills development to meet the needs of the economy and employers for a qualified, flexible and adaptable workforce.

(f) It seems that the goals of the *Romanian Lifelong Learning Strategy 2005–2008* and the *Development Plan for Romanian Adult Education 2009–2013* do not unconditionally follow these models, but they include features of the first (A), third (C) and fourth (D) models. The goals do not include the pursuits of the second model.

One must agree with the viewpoint of Larissa Jõgi that none of these models or ideal types exist in their pure form in any country, nor are any of them pursued as such. Rather there are hybrid forms in various countries with different emphases on one or several of these principal directions that are grafted on to existing systems of education and training, sometimes with little real change.

Conclusion

Since the 1990s, the role of adult education and lifelong learning has been growing. From 1991 to 2000, Romania underwent fundamental changes that significantly influenced the structure, essence, goals and

priorities of the education system. Considering the demographic changes in Romania, adult education continues to be an important strategic area in terms of the country's development. Globalisation and development trends in the European Union have affected the distribution of international educational ideas and created the need for the harmonisation of the education systems of member states. Romanian adult education policy is strongly influenced by EU educational policy and supranational organisations whose goals are greatly associated with economic developments. The dependence of the decision-making process in educational policy on supranational organisations and international trends is particularly clearly manifest in the smaller member states of the European Union and on the periphery of the OECD. For instance, in Romania (and also Latvia and Lithuania) the developments are similar to those in Finland. It seems that in the implementation of recommendations from supranational organisations, it is important to keep in mind that an over-enthusiastic or hasty implementation of the 'best' models or indicators on a national scale might not always be the most suitable solution. In the coordination of national education, implementing solutions that do not agree with the country's history, values or traditions or the people's actual needs may entail the surrendering of the educational policy to the supranational level¹².

Recent years have been characterised by increased learning opportunities. In the context of EU lifelong learning policy, adult participation in adult education is stated as an effective tool for achieving economic growth, but the participation rates in adult education in Romania do not look very promising yet.

The greatest contradiction in adult education is that the people who are the least motivated to participate in adult education are those with lower levels of education, and who are older and from non-Romanian speaking nationalities.

Regionally, training opportunities vary greatly; adult education is centred in larger cities and a significant share of adult training opportunities are not free; thus, adult training is often available only for highly educated people with good incomes. The second contradiction in Romanian adult education is connected with educational inequality. Adults have unequal learning opportunities due to regional, social and economic

¹² Saar, E., 'Intergenerational social mobility', in M. Lauristin (ed.) *Romanian Human*, 2010, 174-176.

factors. There is also inequality between various vocational and professional groups. The inequality in terms of participation and access in adult education could mirror broader structural inequalities in Romanian society as well as institutional differences. The third contradiction is manifest among national priorities, goals and the motives for participating in adult education. Strategic goals establish the need to guarantee the availability of formal and non-formal education for adults to secure the improvement of the population's level of education and increase participation in education (Development Plan for Lifelong Learning, 2009–2013). Results regarding participation surveys indicate that the motives of adults are not related to the improvement of their educational level. The motives for participation do not overlap with the national priorities and strategic pursuits. The strongest motives for participating in adult education are factors related to self-development: the wish to expand one's horizons (a very strong reason for 89% of the 966 respondents to one such survey), the wish to improve self-confidence and be more satisfied with oneself and obtain new knowledge and skills utilised outside the place of employment (strong reason for 67% from among 966 respondents).

The fact that the strategic goals of adult education mostly focus on quantitative indicators that take no account of personal barriers and do not reflect changes in the qualification, knowledge and motivation of people is another contradiction. The Development Plan for Lifelong Learning 2009–2013 and its implementation plan for 2009–2011 bring together the goals of adult education, but common priorities that all institutions, interest groups and social partners developing adult education could adhere to are non-existent. Analysis of factors affecting adult participation and learning need long-term quantitative and qualitative studies with different target groups.

Interviews conducted with 15 experts in education in the context of international research 'Education in Romania and Finland and Changes in the Educational Policy of the European Union, 2006–2008'. The target groups of the surveys 'Professional training and development activities of adults' and 'Adult training in non-formal training centres' for the period 1 July 2009 to 31 December 2009 were adult participants in training courses funded through the European Structural Fund programmes 'Professional training and development activities of adults' and 'Adult training in non-formal training centres'. The total number of respondents was 966. Every country has certain characteristics that influence the opportunities for lifelong learning and adult education. The ongoing analysis of the

development of the educational process and the effects of educational policy enables us to discover the innovation opportunities in adult education and understand adult education in a broader context.

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HUMAN RESOURCES DEVELOPMENT STRATEGIES IN SMALL AND MEDIUM ENTERPRISES

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Abstract: *"In order to achieve its economic goals (sustainable growth, healthy competition, and economic development), the E.U. has focused on creating and developing small and medium enterprises (SME). Therefore, it is not surprising that they represent 99% of all companies operating in the E.U. countries. They also provide 85% of all private sector jobs and 54% of added value (European Commission, 2016)¹. Unfortunately, many of these kinds of companies have a short life span due to a lack of managerial competency. Taking all this information into account, we have conducted a research regarding the types of training that are available to SME's, with all their pros and cons, in the Romanian business environment and we identified several strategies that can be implemented in these companies in order to develop managers and employees, thus creating the necessary conditions for these companies to grow."*

Keywords: *SMEs, entrepreneur, training, human resources, learning, strategy.*

1. The development and training of human resources in small and medium companies

Entrepreneurship has a vital role in a country's business dynamic, and, so, its development requires an appropriate economic, managerial, judicial, cultural, and social context. With regard to Romania, we will be analysing the HR training and development activities and look for the adequate strategies which will sustain the evolution of Romanian SMEs. Our study is predicated upon the existence of a direct relationship between the training

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¹ <http://ec.europa.eu/growth/smes/>, European Commission, 2016

of employees and the company's performance indicators, as evidenced by studies published approximately ten years ago (Delery and Doty 1996²; Becker and Huselid 1998³). Several researches studies (Beaver, 2002⁴, Mazzarol, 2004⁵) have shown that SMEs deal, early on, with difficulties regarding the managers' strategic thinking, which, in the long run, affects the enterprises' competition level. It is estimated that only 27% of SMEs have a bigger than five years life span (Rann 2006).⁶ Taking this into consideration, there is an obvious need for innovation, knowledge transference, and the improvement of managerial skills which would maximize the chances of survival and development of SMEs (Kearns, 2002)⁷. That is why, using both theoretical approaches and successful practices, we will look for those education and training strategies that will work in all the stages of a business' life cycle: start-up, crisis and/or survival, growth and/or expansion, export and/or globalization.

As we already know, the development and training of employees refer to the process through which the transfer of knowledge, skills, and abilities is conducted (KSA- knowledge, skills and abilities) in order to carry out specific tasks; therefore, the benefits of these activities become strategic and their results are amplified for both employee and company.

According to the opinion of HR managers, the beginning of the 21st century has brought on several important challenges regarding training and development of employees (Stavrou, Brewster and Charalambous 2004).⁸ If

² Delery, J.E., Doty, H.D., *Modes of Theorizing in Strategic Human Resource Management: Types of Universalistic, Contingency, and Configurational Performance Predictions*, Academy of Management Journal, 1996, 39, 4, 802-835.

<https://arwana007.files.wordpress.com/2012/02/modes-of-theorizing-in-shrm.pdf>

³ Becker, B.E., Huselid, M.A., *High Performance Work Systems and Firm Performance: A Synthesis of Research and Managerial Implications*, in Research in Personnel and Human Resource Management, Greenwich, Ed. G.R. Ferris, CT: JAI Press, 1998, pp. 53-101.

⁴ Beaver, G., *Small Business, Entrepreneurship and Enterprise Development*, Edinburgh, Pearson Education Limited, 2002,

<https://books.google.ro/books?hl=ro&lr=&id=fppDtj9bmeoC&oi=fnd&pg=PR9&dq>

⁵ Mazzarol T., *Strategic Management of Small Firms: A Proposed Framework for Entrepreneurial Ventures*, 2004,

<http://www.cemi.com.au/sites/all/publications/Mazzarol%20SEAANZ04%20paper.pdf>

⁶ Rann, M., 'International expert to help small business', in news release for The Advertiser, Monday, 6 November, 2006, <http://www.thinkers.sa.gov.au>

⁷ Kearns, P., *Are two worlds colliding? The provision of training and learning services for small business*, CVER, delaide, 2002, <http://eric.ed.gov/?id=ED473179>

⁸ Stavrou, E., Brewster, C., and Charalambous, C., 2004, Human Resource

we want to meet these new demands coming from the business environment, we will use to a wide array of training and development which are adapted to the current tasks and which improve performance and client satisfaction. At the same time, there will be a focus on developing careers and increasing individual, group, and organisational efficiency. A well planned development and training program starts from the necessary level of knowledge, skills, and abilities that we use in order to achieve organisational goals and create competitive edge (Peteraf 1993).⁹

In order to get a clearer picture with regard to the area of employee training, we will take two major categories into consideration:

- *formal or structured training*: this follows a pre-determined plan, is organized and led by an expert, while also being monitored and recorded by a training supplier (Dawe 2003)¹⁰. The objectives of this kind of training are clear and focus on the knowledge and skills which need to be addressed.

- *Informal training*: as opposed to formal training, the informal category is carried out by the employee himself (i.e. learning by reading books). This type of training occurs when there is a circumstantial or random need for learning (mentoring). Informal training is certainly an important instrument in learning and education and it is utilized by SMEs everywhere (Figgis et al., 2001).¹¹ In fact, the concept of informal focuses on two key aspects: expected results and the level of guidance given to the people who are learning. Depending on the case, the expected results can or can't be specified ahead of time (like in the case of a team that was constructed solely to solve a problem created by direct activity). At the same time, the guidance of the learner can be accidental (as in the case of conversation, mentoring process or networking). In this case, there is no plan and no fixed objectives. Informal learning also includes everything that an employee learns from his, manager, supervisor or colleague, but

Management as a Competitive Tool in Europe, working paper, London: Henley College, <http://citeseerx.ist.psu.edu/viewdoc/summary?doi=10.1.1.558.246>

⁹ Peteraf M. A., *The Cornerstones of Competitive Advantage: A Resource-Based View*, Strategic Management Journal, Vol. 14, No. 3. (Mar., 1993), 1993, pp. 179-191, <http://links.jstor.org/sici?sici=0143-2095%28199303%2914%3A3%3C17>

¹⁰ Dawe, S., *Determinants of successful training practices in large Australian firms*, NCVER, Adelaide, 2003,

https://www.ncver.edu.au/__data/assets/file/0015/10743/determinants-of-successful-training-practices-930.pdf

¹¹ Figgis, J, Alderson, A, Blackwell, A, Butorac, A, Mitchell, J & Zubrick, A., *What convinces enterprises to value training and learning and what does not?*, NCVER, Adelaide, 2001, <http://trove.nla.gov.au/version/217785339>

also from his family and social circle. It can be accidental, as in the case of acquiring skills and values through observation or receiving coaching from a superior or colleague.

This classification isn't always easy to make, as both types of training usually meet and complete each other. When there's managerial support or a cultural organisation that is based on education, the value, utility and efficiency of training is always amplified (Figgis et al. 2001).

In SMEs, informal training is often preferred, without excluding formal training and development or learning on the job (Kearney 2000)¹². There are cases in which small and medium companies use both training systems (Figgis et al. 2001)

2. Training investments in romanian SME's

Over the last few years, Romania has had a steady economic growth, as evidenced by several key economic indicators. Here are a few of the country's results in 2015: (Popa I. & collab, 2016).¹³

- The Gross Domestic Product – GDP has increased by about 3.7%, one of the most accelerated rates in the E.U;
- The gross industrial production has increased by 2.4%;
- Exports have surpassed 54,6 billion Euros (with an increase of approximately 4% in one year);
- Inflation rate has hit a historic low, at 0.7%;
- Unemployment rate has decreased to under 7%.

In order to provide further evidence to these statements, we will bring forth several new arguments regarding *GDP, work productivity and unemployment rate*.

- *The evolution of GDP in Romania*

As we already know, the *Gross Domestic Product* is a macroeconomic indicator which reflects the sum of the market value of all goods and services destined for final use that are created in a country's economic system in a single year. It is calculated as a sum of:

¹² Kearney, P., *Size matters: National summative evaluation report of the Small Business Professional Development Best Practice Program 1996–2000*, Office of Vocational Education and Training, Hobart, 2000,

<http://www.voced.edu.au/content/ngv:14152>

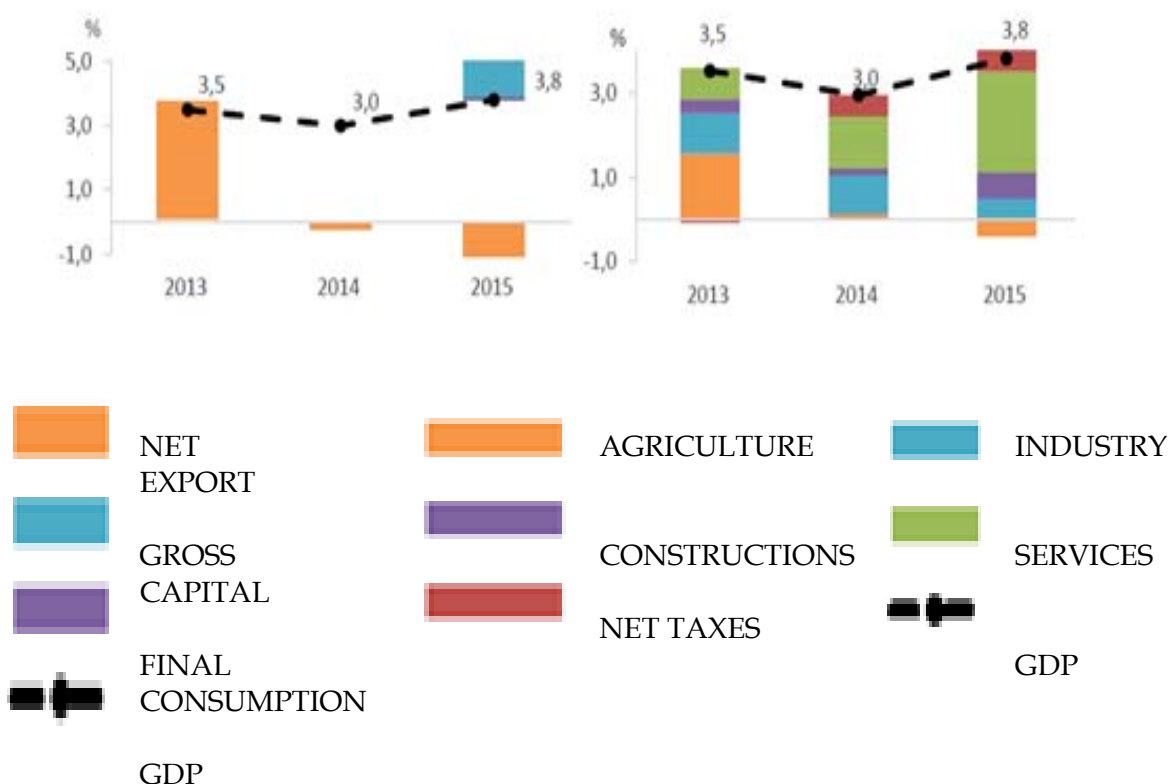
¹³ Popa I. & colab, *The Health State of the Romanian Management in 2015*, Pro Universitaria Publishing House, Bucharest, 2016,.

- expenditure referring to consumption made by private households and non-profit organisations,
- expenditure referring to investments,
- government expenditure,
- investments referring to deposits,
- earnings made from exports subtracted by expenditure referring to imports.

The formula to calculate the Gross Domestic Product is:

GDP = private expenditure+government consumption +investments +(exports–imports)

In the graph below, we can see the evolution of the level and structure of the GDP.



Graph 1 The Evolution of GDP in Romania
Source: Convergence Programme 2016-2019¹⁴

¹⁴ Convergence Programme 2016-2019, The Government of Romania
http://ec.europa.eu/europe2020/pdf/csr2016/cp2016_romania_ro.pdf

- *The level of work productivity*

This indicator is especially relevant when considering the current status of an organisation, a system, and the national economy. It can be influenced by many factors, one of them certainly being the level of managerial competency. In the table below, we can see Romania's current status when compared to other European countries with regards to the GDP level.

Table 1. The level of work productivity in Romania and other countries from Central Europe

Number	Country	Productivity per hour of work (UE-28=100; 2015, Index 2010=100)
1.	Bulgaria	112,8
2.	Sweden	104,7
3.	Hungary	101,4
4.	Poland	111,7
5.	Romania	123,1
6.	Slovakia	110,8
7.	EU28 Average	104,5
8.	Austria	103,2
9.	Finland	101,3
10.	United Kingdom	102,2

Source: adapted from Popa I.& colab., 2016

- *The evolution of unemployment rate*

Creating and maintaining the level of available jobs is a desirable objective from an economic and social standpoint. The globalization of business, coupled with the evolution of technology have had many benefits, but have also generated a certain level of risk regarding job security. Unlike other European countries, Romania has not been confronted with a growing unemployment rate in recent years. Still, the situation is carefully observed and there is a permanent concern with keeping unemployment rate under control, while also changing its structure (by eradicating the high unemployment rate among young people).

In the table below, we can see some of the information which allow us to get a better view of the unemployment rate dynamic, plus a comparison between Romania and the E.U. average.

Table 2. Annual unemployment rate in Romania and the E.U. between 2010-2015

Year	2010	2011	2012	2013	2014	2015
E.U.	9,6	9,7	10,5	10,9	10,20	9,4
Romania	7,0	7,2	6,8	7,1	6,8	6,8

Source: adaptation Popa I.& colab., 2016

As we can see in the table above, the unemployment rate has oscilated 6,5 and 7,2%, under the E.U. values, which is, obviously, a favourable aspect.

This is owed to the fact that the entrepreneurial field creates a high number of jobs. Beyond their economic contribution, SMEs have a vital role in increasing the rate of workforce occupation. For example, we know from o survey conducted among small and medium Romanian enterprises that this sector helps create a high number of jobs in the conomy. In order to reaffirm this statement, we look at a study conducted by Popa (2016), according to which 0.84 people have been hired as an average, while only 0.55 have left an organisation. Thus, there is a 0.29 average increase in the workforce occupation for each SME.

This phenomenon is not unique to Romania, but rather it is a situation encountered in many other European countries. Many such SMEs have surfaced, with many of them consolidating and becoming influential in the market as a result of several factors. Out of these factors, we focus on one, which is the *favourability* of the business environment in our country.

In the table below, we find several numbers indicating the favourability of the Romanian business environment, as compared to other countries.

Table 3. The Favourability of Conducting Business

Current Number	Country	Current Number Worldwide	The Favourability of Conducting Business
1.	Poland	25	76,45
2.	Slovakia	29	75,62
3.	Czech Republic	36	73,95
4.	Romania	37	73,78

5.	Bulgaria	38	73,72
6.	Hungary	42	72,57

Source: Doing Business 2016, Measuring Regulatory Quality and Efficiency, Economy Profile 2016, România, pg. 8)¹⁵

The development and efficiency of Romanian SMEs is often influenced by the deficit of competencies and, implicitly, by the low percentage of training programs that would allow the sharing, forming, and consolidation of desired skills, attitudes and knowledge. Here is some information which reflects the training activities focusing on Romanian SME's human resources (they are the primary client of training and development suppliers, considering the fact that two thirds of the total number of employees are hired in SMEs in Romania) between 2009-2015:

- The number of companies that have not had any training programs is 2.14 times greater (from 35,25% in 2009 to 75,62% in 2015);
- The percentage of organisations that have intensely focused on a high level of human resources training and development (over 10 days of training) is 10.48 times lower in 2015 compared to 2009 (1.17% versus 12.27%);
- the 2009-2013 interval was characterized by the higher number of companies that did not allocate a single day of human resources training, but also by the decrease of percentage of organisations that have dedicated 1-5, 6-10 or over 10 days of training per year. 2014 and 2015 reveal a similar average at the SME level, with the exception that there was a 60% increase in percentage of SMEs that have allocated 1-5 days of training during that year.

We can, therefore, safely conclude that the SME training dynamic over the last seven years did not have a positive impact on the managers'/employees competencies and on the performance levels of this particular sector, on which Romania's economic and social development is dependant upon. We can easily see this from the table below:

¹⁵ www.doingbusiness.org/.../doing%20business/.../profiles/.../, Doing Business 2016, Measuring Regulatory Quality and Efficiency, Economy Profile 2016, România, pg. 8

Table 4. The evolution of the number of days of training per employee in SMEs (%)

No.	No. training days per employee	2010	2011	2012	2013	2014	2015
1.	None	60,88	62,52	70,70	83,13	75,84	75,62
2.	1-5 days	24,88	23,46	21,35	12,35	20,01	20,48
3.	6-10 days	7,20	7,87	4,34	3,61	2,55	2,72
4.	Over 10 days	7,04	6,16	3,61	0,92	1,59	1,17

Source: adaptation Popa I. &collab, 2016

As we have already stated, Romanian SMEs employ over 66% of total workers. Their interest in training is reflected in the table below, where we can see the evolution of the *average training days per employee per year* between 2010 and 2015.

Table 5. Average training days/employee/year (%)

No.	No. days/employee	2010	2011	2012	2013	2014	2015
1.	None	60,88	62,52	70,70	83,13	75,84	75,62
2.	1-5 days	24,88	23,46	21,35	12,35	20,01	20,48
3	6-10 days	7,20	7,87	4,34	3,61	2,55	2,72
4.	Over 10 days	7,04	6,16	3,61	0,92	1,59	1,17

Source: Popa I.&collab., 2016

3. Strategies in the field of training and development of human resources in SMEs

When we talk about training and development strategies for human resources in SMEs, we want to focus on the necessity of taking coherent measures that will sustain human competencies regarding long term business objectives. The dynamism and diversity of the types of activities, along with internal and external conditions lead, as expected, to different strategic choices. Our intention is to identify as many options as possible, while also evaluating their consequences. This way, the managers that are preoccupied with the evolution of their company can have an extra source

of inspiration and a solid support upon which they can make informed decisions.

Before formulating any possible directions, we want to first underline the fact that small enterprises need to use both informal and formal trainings going forward.

Now, we will present some of the solutions that SMEs can opt for, depending on their activity, their economic stability and the managers' and owners' philosophy regarding business in general:

- *Business Mentoring*: this concept refers to a deliberate association of people with extraordinary skills and experience. Through this association, people with a higher degree of know-how and experience choose to facilitate the development and competency of people with a lower degree of experience and skills. There are two main approaches in this case: *one-to-one mentoring* and *business aptitude training*, which involves workshops, guest speakers, networking, and business discussions. Gordon Consulting (1996)¹⁶, a company that offers this type of support, talks about volunteering mentors in business. They have the objective of talking about their own experience, as well as stimulating an honest, open conversation, both in large groups and among partner mentors. The exchange of ideas with the other partners, coupled with role playing exercises is considered extremely useful in creating valuable business mentors.
- *Networking*: this concept refers to people who decide, out of their own volition, to act together in order to accomplish something they cannot do on their own. Any activity conducted via this medium is usually guided by individual needs. Unlike networks, clusters (which are also a type of network) work short term and facilitate the solving of concrete tasks or urgent matters which involve all participants.

Business networks are extremely important for the informal development of SME employees. They allow for the distribution of knowledge and experiences, thus reducing training costs for SMEs.

- *The Collaborative Learning Group*. In this case, companies work together to improve employee skills at a lower cost. The interest for this type of training strategy derives from the cost benefits

¹⁶ <http://www.gordonconsulting.com.au/contact-us/>, Gordon J. Consulting, 1996

created by scale economy (by dividing the training programs). Furthermore, this strategy facilitates the access to programs which are adapted to company needs. Studies have shown that this type of training gives SMEs access to high quality training at a reasonable price. This is possible by creating the context through which they can access bigger companies' training resources, thus developing their employees' skills. Frequently, companies who collaborate with the aim of increasing employee competencies decide to work in a certain sector, domain, supply chain or cluster. In this case, there are two types of collaboration models: the *hub and spoke* approach, through which a large company handles the development of smaller companies' activities (i.e. supply chain), and the *cooperative* approach, in which small companies work together in a mutually beneficial fashion, by providing mentorship, sharing competencies and training programs, plus the necessary skills needed to maximize their chances of winning bids and contracts. There are four categories of skills based collaborations between companies: the local are – in a similar or connected field; the local area – in distinct fields; the national industry field and supply chains.

- *The Act of Learning*: according to Kearney (1999, 2000)¹⁷, networks and clusters frequently use learning strategies, but this approach is dependent upon stakeholders, who manifest a tendency of blocking this process. The act of learning involves a group of stakeholders which is divided into teams. Each team gets a problem which is directly related to work issues. The team gathers information in order to formulate hypotheses which they can, then, test in real conditions. Later, participants reflect on the process and results, they adjust the initial solution and the process is repeated regularly. By following the principles of the act of learning, notable results can be obtained in very different circumstances.
- *Diagnostic and Benchmarking*. The concept of diagnostics involves an evaluation process which offers a structural direction through

¹⁷ Kearney, P., 1999, Big pictures from the small end of town: 1998 Small Business Professional Development Programme, evaluation report, Office of Vocational Education and Training, Hobart, <http://www.voced.edu.au/content/ngv:21503/> Kearney, P., 2000, cited works

which the company's performance can be improved, while also managing to better predict results and identify key points of attention. Kearney's (2000) opinion is that, when final consumers are involved in the design and validation of analysis instruments with regard to business needs, this analysis becomes a useful way of making connections between training and business needs. Regarding Benchmarking, it is seen as a strategy meant to help small companies have a more structured approach in relation to training and learning (Kearney 2000). Benchmarking can play a key part in shortening and amplifying the connection between the analysis of business needs, training solutions and business results.

- *Other Possible Strategies*

Among them, we focus on:

- *Vendor training*. This strategy originated in the IT field, where the supplier of equipment and software is called a vendor. The concept of Vendor training emerged, referring to induction training, offered by the supplier at the workplace. It is, essentially, a formal training program and can last anywhere from a few hours to a few days, depending upon the complexity of the equipment. This initial training, supplied by the equipment's vendor, is included in the cost of acquisition. When the initial group has been trained, then it is usually their task to informally disseminate the information to other employees.
- *E-learning*. Its impact has been closely monitored by several studies. Smallbone, Supri and Baldock (2000)¹⁸ reveal the importance of utilizing software tutorials sent by vendors or by other training suppliers (via e-mail, CD's, or directly to the website). This allows for a greater flexibility in terms of delivering training programs, which is quite valuable for a small company. Ward and Bennet (2004)¹⁹ have spent years working

¹⁸ Smallbone, D., Supri, S & Baldock, R., 2000, The implications of new technology for the skill and training needs of small-and medium-sized printing firms, *Education & Training*, vol. 42, issue 4/5, pp.299-307,

<http://www.emeraldinsight.com/doi/abs/10.1108/00400910010347768>

¹⁹ Ward, C & Bennet, D., 2004, *Enterprising, franchised and online: Towards a model of e-learning for small businesses*, project report, Australian, Flexible Learning Framework, Brisbane, viewed 14 July 2006,

http://www.flexiblelearning.net.au/projects/media/enterprising_project_report.pdf

with small enterprises and they have identified the training needs, but also the barriers created by technology and the way in which skills and competencies can be best applied within the business.

- *Collaborative Learning Partnerships*. Mitra (2000)²⁰ has taken a look at the learning process, with a focus on group learning, and took a special interest in the area of regional cluster innovation. This author also points out the fact that innovation is often the result of interaction between *technologies, employees* and *organizations*, while also being amplified through learning. Meanwhile, it is his opinion that SMEs are more inclined to innovate when being part of clusters because, through the relationship process and management externalization (a key element for clusters), they are able to develop new processes, products, and services.
- *Coaching on the Job*, or learning from others. Many entrepreneurs take on the role of managers and coach their employees, give them advice, and point them in the right direction. This strategy can have spectacular results when the manager is skilled and the size of the company is quite small.
- *Learning from colleagues* (from equals) is a strategy which can be applied in a company who wishes to share experiences, knowledge, and skills. Furthermore, collaborative learning is used in many situations in which supervisors/managers utilize coaching in order to improve the level of innovation from within the organization.
- *Learning in family businesses*. In this case we can talk about specific learning problems and needs, especially when considering the transition from ownership to management. In the case of family businesses, the risk of their disappearing is high, with one solution of their survival being that all the family members go through a learning and training process through which they can generate new ideas and work methods.
- *Job rotation*. In essence, we are referring to an indirect strategy used by many companies in order to develop skills. In many European countries, this approach managed to decrease the level

²⁰ Mitra, J., (2000), Making connections: Innovation and collective learning in small businesses, Education and Training, vol.42, issue 4/5, pp.228–36, <http://www.emeraldinsight.com/doi/abs/10.1108/00400910010373679>

of job occupancy and increased the level of competencies by offering financial packages. This way, SMEs were compelled to include training programs for unemployed people so that they can be used to substitute employees that were absent for one reason or another.

Conclusions

This present paper has the objective of offering solutions through which to maximize training and development of human resources to those who are interested in the development and consolidation of SMEs in Romania.

The analysis of opinions as expressed in specialized literature, coupled with observing current practices in many Romanian SMEs, allow us to formulate a few viewpoints:

- SMEs who have a clear image of the way in which their employees learn have a better chance of reaching their goals. According to specialists, for one such firm it is more difficult to allocate formal or direct training. More often than not, managers and employees learn from their own experience and through the means of social networks. Furthermore, the opportunity to connect through such networks offers the possibility of critical reflection regarding their own business as well as the level of knowledge and experience. Having said that, the importance of formal training should not be ignored.
- As we have already stated, people who are involved in small businesses prefer informal training within the organizations, but they can also take positive aspects from formal training which they can, then, use in workplace training programs (i.e. better organization, a higher degree of planning, etc.)
- Training and development strategies which use more than one formula have better results than those focused on a single approach.
- When managers are worried about training costs, they can choose cheaper options such as business mentoring, workplace coaching or they can get spectacular results by collaborating with other companies (i.e. supply chains and clusters) in order to allocate formal training for themselves and their employees. At the same time, according to cu Kearney (2000), small enterprises can use informal means such as learning on the job or using business

networks which provide the necessary tools for many small businesses simultaneously.

We've presented, throughout this article, several options that SME managers have, while also discussing the advantages and disadvantages of each solution. There is one condition that we did not present when it comes the success of a business and it is very important: in order to create and implement a sound strategy, it is essential that we have a great deal of motivation in achieving personal growth, while also finding a consensus with all parties involved in order to have a durable, sustained business evolution.

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„THE INGREDIENTS OF A STRONG ATTACHMENT BETWEEN THE PARENT AND THE CHILD – THE GAME AND THE EMOTIONAL SYNCHRONISATION”

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Abstract: *Every child needs safety, accomplishment, joy, love, acceptance. Every child feels the need to be connected and close to his parent in order to know himself and the world around him. Every child feels the need to share all this with us, learn from us, share all the good and bad experiences with us, become a balanced and responsible adult for tomorrow's society.*

When the child is emotionally connected to his parent, even for a short period of time, he feels like belonging somewhere, like being important. His needs and fears are taken into account, and his levels of anxiety and frustration, even aggressiveness, drop.

The connection with the parent is similar to a rope tied to a balloon. If the rope is untied, the balloon will fly with no destination. The emotions of the child who feels disconnected from his parent will go in all directions possible, in all his present and future relationships.

Keywords: *Game, emotional connection, emotional synchronisation, feeling of safety, acceptance, love, the brain's flexibility, strong attachment.*

Playing is fun, but it means much more than this, playing and a playful attitude may help us create an emotional connection with the child, through pleasure, through physical touch and through laughter. Game is also an important component of cognitive, social and emotional development of the child. Through game, the child assimilates information about himself and about the world he is a part of.

If the child did not play with the attachment figures from his early childhood, this deprivation may delay his development on many extents (affectivity, sociability, the cognitive zone, the language zone, even the sensorial one).

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Playing helps the children about themselves, about the world, about objects and phenomena, about others. Playing helps the child express himself, try life experiences, have new ones, explore the environment, work through his own emotions, but also through others'. Children use game even to defeat their fears. Playing is an important component for the development of the friendship and cooperation abilities. Through game, the child sacrifices his own selfishness. In order to play with those of the same age, the child first learns how to like his partners and to look after them, respecting their rules and wishes. This way, sacrificing the selfishness is a part of the social consciousness construction. For the sake of socializing, the child learns how to hold back the physical and verbal aggressiveness, the rage, the hatred, which, normally, are natural when frustration comes in.

After some time of playing, the child learns how to talk, listen and read the facial expressions and gestures of others. In time, the child becomes capable of learning that, if he wants his friend to play with him, he has to share, negotiate, respect rules, make new ones, be patient and tolerant. Just as Piaget¹ used to say, the social game is all about the construction of self and world consciousness. So, the development of self-consciousness depends on the long history of pleasant experiences with his parents.

All in all, playing together with the adult gets the child ready for the social game, with others. Playing gives the child the opportunity to be preoccupied with the challenges of adult life, it builds the social abilities of cooperation and help. It offers him self-confidence, it helps him develop the ability to have fun and enjoy life, it builds the feeling of social affiliation. The lack of early playing experiences may trigger a decline of emotional and social development of the child, Elkonin².

We truly think that joining his child in the game helps the parent feel pleasure, comfort, security and have a better communication and affective closeness to his child. It helps the child, as well, to experience even the adult situations and roles (of mother, father, doctor, engineer or truck driver). Even the parent, discovering his inner child, lets his creativity, spontaneity, empathic capacity free and, this way, he understands more deeply his child. Playing together with his child also has a therapeutically

¹ Piaget, J., *Child Psychology*. Bucharest, Cartier Publishing House, 2005.

² Elkonin, D.B., *The Psychology of Game*. Bucharest, The Didactic and Pedagogical Publishing House, 1980.

described character, it makes the adult forget about his daily worries and charges him emotionally.

The key to the benefits of laughter is found in the chemistry on the limbic region, the emotional centre of the brain. The tonsil and the hippocampus, in the centre of the limbic region, are involved in detecting the threats and flooding the brain with stress hormones, to activate the organism in “battle” or “run” to insure survival. When the stress hormones are repeatedly released, they remain at a higher chronic level. The limbic region of the brain, including the tonsil and the hippocampus, is activated during laughter.

Fun, game and laughter increase the opioids and reduce the level of stress hormones, leading to relaxation sensations and making the frustration resistance better. Laughter is like a switch for the answer to stressful and tensing agents, Berck³.

Our lack of time, as parents, the full schedules, the extracurricular activities of the child (sport, piano, dance, even personal development, doing homework), can be true obstacles in synchronising with the child, in the “real game next to and together with the child”. Unstructured time is beneficial for the child, as he relaxes, simply plays, experiences life situations and his own life as a child.

Every child feels the need to be connected and close to his parent to get to know himself and the world around him. He wants to be close to us, spend time with us, share with us all his joy and sadness.

Children who received affection and who synchronise emotionally with his parents, who live in a secure environment, have developed a large frustration valve. They have learnt how to not be afraid of their own emotions and feelings, they have learnt how to recognize their emotional feelings and to talk about them, to set them free, in other words, to accept them. They have internalized the calming words of their parents and have developed the ability to calm down on their own, to trust the fact that their parents are present in their lives, both emotionally and morally.

On the other hand, the child with attachment problems has a narrow stress tolerance valve. For a significant time, during his development, he did not have any person to help him express his feelings, to teach him how to calm down in stressful times, he had nobody significant to share his emotional suffering with. And so, he got to think that the world and the

³ Berck S., *Neuroendocrine and stress hormone changes during mirthful laughter*. American Journal of the Medical Sciences, 1989.

relationships are unsecure and evil, to distrust his own strengths and, sometimes, he really cannot solve by himself the inherent problems of life. In other words, his maladjusted behavioural schemes have become glued, have repeated themselves and, so, they have built the so-called maladjusted lifestyle.

Children who have been through a traumatic loss are scared of the intensity of their own feelings and emotions, their grief, sadness and even fear feelings have gone deeper. The child will learn together with his parent to be capable of learning, to feel his own feelings, to step into their own affective desert, to turn the feelings into words, to exteriorize them to be able to go through and not over the traumatic memories and the intense emotions he experienced at one certain point in his life.

These children with attachment problems need our help to widen the frustration valve, but also to amplify the emotional connection to his parents. But the child lives in a deep state of anxiety, he may be looking for a replacement of the mother all the time, hoping that this will make him self-calm. This behaviour of searching is not a conscious activity for a child, he lives at a high level of anxiety. He may become manipulative and to demand more attention to feel comfortable, or he may even look for comfort through other ways that satisfy him and bring him pleasure (eating a lot, sweets, asking for his parents to be with him all the time, asking all the time for toys, getting sick very often). The emotional negative state of the child maintains and can even accentuate if the mother does not connect to his emotional state.

There are, however, situations when the parent is overprotective when it comes to his child and a bad synchronization happens then, again, losing sight of the moments of emotional tension of the child or the moments of exploring the environment, the parent loses sight of the needs of the child, in general, focusing rather on his safety needs. And then the parent becomes a restrictive mother who, from "too good" intentions, she gets to cut off the wings of the child. Moreover, the child does not win his independence, his autonomy, he does not have the courage to explore the environment, and, later on, the lack of this autonomy may lead to the incapacity of being autonomous in his adult age, to the incapacity of living his life on his own and of being happy and accomplished. Many times, these people hang on to interpersonal relationships, they are addicted to them.

People react to everyday situations basing themselves on the previous information that has been planted into the brain, on the reptilian brain,

Siegel, D⁴. was explaining the fact that specialized neurons that can imitate the behaviour in the brain of another individual are the base of the empathy between people. When we see emotion, our mirror neurons are moving, and they give us an answer, letting us feel what the other is feeling.

The final form of the brain is only partially determined by genes, they only give us a starting point, the experience, though, extends the possibilities offered by the genes. The brain's availability to answer in front of the experience is called flexibility. Flexibility plays a fundamental part in the development of the brain, because it reflects its capacity of being fashioned by experience. The young brain has a bigger flexibility than the mature one, it is, this way, easier to fashion the brain of a child than the brain of an adult from the point of view of the behaviour.

We believe that every alive organism tends to change its shape, to reorganise depending on the environment's demands. We think that a big part of what we owe to the genetic agent, and, this way, we could influence the genetic material as well. The capacity of the brain to adapt to new life experiences, the formation and the reformation of neuronal lines is a recent theory that deserves all of our attention, including the reconnection parent-child.

Lots of our emotional memories are like a fingerprint, a fingerprint that follows us all lifelong. They come from the early relationships with the referential person. Neurosciences consider that neuropsychological lines can be redone, rebuilt, through learning. If a neuropsychological line is not used anymore, the individual's behaviour may change. In other words, we can make and learn brand new neuropsychological lines depending on the wanted behaviour and the environment's demands.

From the psycho-pedagogy point of view, learning is a process that only exists in humans. The activity of assimilating information and achieving habits in all the life's domains (psychical, sensitivity, want). So, learning is a process that determines a lifelong change of the behaviour of the one who learns, of the way of thinking, feeling and acting. At the end of the learning activity, the individual will have knowledge, talents, habits, capacities, competences, attitudes that he did not have before the act of learning or he did, but at a lower level of performance.

⁴ Siegel, D., *Mindsight, The New Science of the Personal Transformation*. New York, Batman Book, 2010.

Mirror neurones help us understand why the reactions and the behaviour of children get to resemble the reactions and the behaviours of the parents. When the mirror neurons of the children imitate the calm, gentle behaviour of the parent, they achieve a state of calm, and these feelings and behaviour models get to be inoculated. On the other hand, when the neurons of the children reproduce the behaviour models of aggressive, hostile adults, they can feel the same aggressive emotions. The children's behaviour models are an automatic answer to a neuronal network stabilized that has been activated at one point in the past.

Conclusions

When the child is emotionally connected to his parent, even for a short period of time, he feels like belonging to a place, being important. His needs and fears are taken into consideration and his level of anxiety and frustration, even aggressiveness, drops.

The connection with the parent is similar to a rope tied to a balloon. If the rope is untied, the balloon will fly with no destination. The emotions of the child who feels disconnected from his parent will go in all directions possible, in all his present and future relationships.

The parent's synchronising with the child's sufferance, his emotional support, his understanding, his affectivity expressed both verbally and physically, will help the child release the emotional blockages, to be conscious of his feelings and emotions, to cry or to talk freely about them, without hiding behind addictive, compulsive, aggressive or somatisation behaviours. The child has to be allowed to consume his sufferance and find his own comfort and emotional support next to his parent.

In order that a child to grow up healthy and beautiful, he needs a secure environment, he has to feel safe, unconditionally loved and respected with all of his being. In order that a child to feel safe, first of all, the parent has to feel safe and this way he will offer security further on. The child needs curiosity and courage to know the world. Our task, as parents, is to stimulate the curiosity of the child, to show him how interesting and fascination the world can be. We should be a part of their games, to learn how to play with him, without, though, taking over the game. The game is a component of cognitive development, the game is important at any age, it releases us from stress and develops the imagination and the creativity.

If the child sees the environment as a pleasant one, where he feels safe, he will try to connect to it, he will try to build strong connections

with the ones around him, with the animals, the plants, the ones of the same age, the other adults.

The child needs unstructured time spent with us. Structuring the time of the child creates a sort of rhythmicity, it helps him organise better, but, at the same time, the child needs playing, unorganised experiences to develop his creative potential.

By taking care of us and our needs, by charging our batteries, we will not only be able to look for the child, to pay attention to his needs, but also to be a good example. We should offer him a healthy model concerning the behaviour with our own person. When we are willing to connect to our inner child, we are also physically and emotionally available for the child in front of us and, this way, the connection between parent and child builds itself. The parent's synchronising and the physical and emotional connection will be vital components when it comes to bringing comfort and safety in the life of the child, and, why not, of the entire family.

Emotional synchronising and playing next to and together with the child are the basic pillars of the strong attachment between the parent and the child. By synchronising ourselves with the feelings of the child, we will also connect to ourselves, but, at the same time, we help the child become conscious of himself, synchronise with himself, we help him get to know his own self better. In time, if a child is encouraged to share with his parent even the less pleasant feelings, he achieves the certainty that he is accepted and his negative feelings become less and less influential.

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A STUDY ON THE QUALITY OF LIFE OF CHILDREN WITH CEREBRAL PALSY, IN ARGES, ROMANIA

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Abstract: " ***Purpose:** To assess the impact of cerebral palsy on health-related quality of life of Arges county-Romania children.*

***Method:** This is a cross-sectional survey. The study involved 54 children (33 males and 21 females), between 1 and 12 years of age, with cerebral palsy. The socio-demographic details of the participants were obtained through interviews. Their HRQoL was assessed using the Child Health Questionnaire-Parent Form. Severity of motor disability was assessed and classified using the Gross Motor Function Classification System. Data were summarised using descriptive statistics.*

***Results:** The participants' overall scores and scores on each domain of were very low.*

***Conclusions:** The health-related quality of life of Arges county-Romania children with cerebral palsy is low and is negatively affected by age and severity of disability."*

Keywords: cerebral palsy, quality of life, children, evaluation, health status.

Introduction

Quality of life is a person's subjective well-being and physical health, material well-being, interpersonal relationships within and outside the family, work and other activities in the community, personal development and fulfillment, and active reaction. It is also an individual's perception of his or her position in life, taken in the context of the culture and value systems in which he or she lives, in relation to his or her goals, expectations, standards and concerns.

Although quality of life has emerged as an important concept in childhood, little is known about the quality of life of children with disabilities, especially those with early onset of disability, and is

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represented along a continuum or spectrum throughout life. There is consensus that children can self-report their quality of life reliably in the absence of emotional distortion, cognitive impairment and learning disabilities¹.

However, it may be difficult to obtain reliable information from children with cerebral palsy who may have mild to significant intellectual impairment or communication difficulties. Therefore, it has been suggested that the use of proxies (usually mothers) may provide better objective assessment of quality of life for these children. The Child Health Questionnaire-Parent Format 28 (CHQ-PF 28) is one of the validated generic health-related quality of life measures that are used to quantify health and well-being in children with various chronic health conditions, including cerebral palsy².

Cerebral palsy is a group of permanent disorders in the development of movement and posture, causing activity limitations that are attributed to non-progressive disturbances that occurred in the developing foetal or infant brain. Cerebral palsy is the most common cause of significant motor impairment in childhood, occurring in 2.5 children per 1000 live births. The motor disorders of cerebral palsy are often accompanied by disturbances of sensation, perception, cognition, communication and behaviour, by epilepsy and by secondary musculoskeletal problems. These are some of the many potential causes of poor health related quality of life (HRQoL) in children with cerebral palsy. The impact of sensation, perception, cognition, communication and behaviour on the health and well-being of children with cerebral palsy, is a topic of increasing research interest.

Chronic illnesses have been shown to have negative impact on the quality of life in adult populations, but with little focus on children, especially those from developing countries. A study that reveals the impact of chronic illness on the quality of life of children is important, as it will provide information to enable better management of this part of the population. In children, health-related quality of life includes not only concepts of illness, functional status, mental health and comfort, but also parental impact and family functioning. Despite the wide-spread prevalence of cerebral palsy, researchers are just beginning to focus on its

¹ Onose G., Pădure L., *Compendiu de neuroreabilitare la adulți, copii și vârstnici*, București, Ed. Universitară „Carol Davila”, 2008, 283-286.

² Landgraf JM, Abetz L, Ware JE., *The CHQ user's manual*. The Health Institute, New England Medical Center, 2000, 145-147.

impact on children's health status and quality of life. Therefore, this study evaluated health-related quality of life of the Arges county-Romania children with cerebral palsy attending tertiary health institutions in Pitesti.

Method

This study was approved by the Ethical Review Committee of the Pitesti Paediatric Hospital, Pitesti. Permission from the authorities of the Pitesti Paediatric Hospital was also obtained. The informed consent of the mothers (the respondents) of the participants (children with cerebral palsy) was obtained, after the objective of the study was explained to them. They were assured of the confidentiality of the information that they would be providing.

They were also informed that they reserved the right not to participate in the study or to withdraw their participation at any time, without any consequences to the management of their children. This study involved 54 children (33 males and 21 females) with cerebral palsy, between 1 and 12 years of age. They were consecutively recruited from two tertiary health institutions in Pitesti, Romania. Their socio-demographic details and health-related QoL were assessed using the Child Health Questionnaire-Parent Form 28 (CHQ-PF 28). The CHQ-PF 28 is one of the validated generic health-related quality of life measures that are used to quantify health and well-being in children with various chronic health conditions, including cerebral palsy. It is a proxy assessment of health-related quality of life in children and has demonstrated good relationship with self-rating of quality of life among them³. The questionnaire was self-rated by the mothers, or by primary care-givers in case of orphans.

The severity of motor disability was assessed and classified using the Gross Motor Function Classification System (GMFCS). Data were summarised using descriptive statistics. They were also assessed for associated health problems.

Chi-square was used to find the association between each of the selected socio-demographic variables and motor disability and QoL.

³ Benga Ileana, Cristea A., *Evaluarea neurologică a copilului*, Cluj Napoca, Ed. Napoca Star, 2005, 114-118.

Results

Thirty-eight children (70.3%) were between 1 and 6 years of age, and 29.7% were between 7 and 12 years (Table 1). The participants' overall scores and scores on each domain of CHQ-PF 28 were very low. The majority (69.5%) was in GMFCS classification-level 1, 13.0% in level 2, and 29.6% in level 5 (Figure 1). The majority (92.6%) of the respondents were biological mothers (Table 1). The older the children were, the poorer was their HRQoL (CI = 95%). Severity of disability had a significantly negative impact on HRQoL of children with cerebral palsy. Age had a significant effect on health-related quality of life of children with cerebral palsy. There was no significant difference between age and physical function. Children with cerebral palsy had associated health problems like attention deficit (2.2%), orthopaedic problems (11.1%), behaviour problems (13.2%), and cognitive problems (2.2%). The number of reported medical problems and deformities were higher in children with more severe cerebral palsy. There was significant association between severity of cerebral palsy and each of physical disability, parenting impact, social and psychological functions. Majority (77.8%) had a lot of limitations in activities that took a lot of energy, while only 1.9% had no limitations. Twenty four (44.4%) could ambulate with mild or little limitation, while 55.6% could not ambulate and were severely limited. Three (5.7%) felt pain very often, 18.9% fairly often, 37.7% once or twice, and 18.9% did not feel any pain (Table 2). Comparing their children's health with health of other children, most parents (79.2%) agreed that children with cerebral palsy were less healthy, 13.2% disagreed and 7.5% were indifferent (Table 2). Eleven (20.4%) of the children did not relate well to their parents and other children, 66.7% related quite well and 13.0% did not relate at all. Two (3.7%) performed social roles expected of his/ her age quite well, 25.9% performed well and 70.4% did not perform well. The behaviour of three of the children (5.6%) was very good, 9.3% was good, 31.5% was fair, and 53.7% was poor (Table 2).

Table 1: Socio-Demographics of Participants and Disability Data

VARIABLES	N	%
Age of the Children (years)		
1-3	23	42.6
4-6	15	27.8

7-9	15	27.8
10-12	1	1.8
Relationship of Respondents to children (n=54)		
Biological parent	50	92.6
Close relative	1	1.9
Grandparent	3	5.5

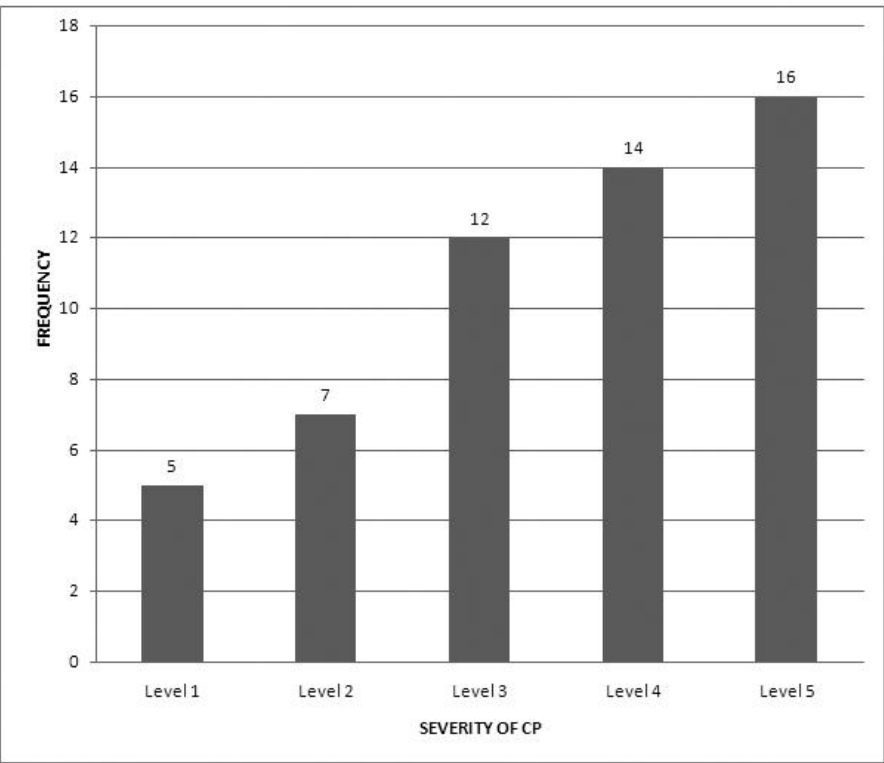


Figure 1: Distribution of Cerebral Palsy children according to severity of cerebral palsy

Table 2: Physical and Social Attributes

VARIABLES	N	%

Pain/discomfort		
A few times	20	37.6
Fairly often	10	18.9
None	10	18.9
Once or twice	10	18.9
Very often	3	5.7
Mobility		
Ambulatory (level 1-3)	24	44.5
Non ambulatory (level 4-5)	30	55.5
Doing things that take little energy		
No, not limited	3	5.6
Yes, limited some	28	51.8
Yes, limited a lot	23	42.6
Does your child relate to other children?		
Not at all	7	13.0
Not well	36	66.7
Quite well	5	9.2
Well	6	11.1
Child's behaviour compared to other children?		
Fair	17	31.5
Good	5	9.3
Poor	29	53.6
Very good	3	5.6
Social role expected of his/her age?		
No	14	25.9
Not quite well	38	70.4
Yes	2	3.7

Discussion

This study was carried out to evaluate the Health-Related Quality of Life (HRQoL) of children with cerebral palsy. It evaluated variables that impact health status and quality of life, and determine the severity of motor disability in children with cerebral palsy. The higher incidence of cerebral palsy among males in this study shows that more male children are susceptible to non-progressive injury to the brain at infancy. This result corroborates those of previous studies, that male children have higher incidence of cerebral palsy. The fact that the number of reported medical problems and deformities were higher in children with more severe cerebral palsy shows that the prevalence of common medical problems increase with an increasing severity of motor disability. This has also been previously observed⁴.

The significant association between severity of cerebral palsy and physical disability shows that severity of disability is associated with poorer general health and physical disability. This finding is in agreement with several previous studies which concluded that the health-related quality of life of children with cerebral palsy has an interdependent relationship with their functional status. The strong influence of severity of disability on physical functioning was anticipated because cerebral palsy is a motor disorder, and therefore affects movement and mobility. Furthermore, the GMFCS (Gross Motor Function Classification System) which was used to assess severity reflected the impact of physical disability on daily activity.

The influence of severity of cerebral palsy on health-related quality of life among children with cerebral palsy might be due to the subjects' physical condition interfering with their personal and social activities. This may indicate limitations in school work, social activities, and friendships. This observation is in agreement with the report of some previous authors, that there is significant association between social activity and severity of cerebral palsy among children with cerebral palsy⁵.

The negative influence of severity of cerebral palsy on psychosocial function shows the negative impact of cerebral palsy on the emotional well-being of children living with it. This finding is in agreement with the

⁴ Căciulan Elena, Stanca Daniela, *Infantile Cerebral Paralysis.Cerebral Palsy. Evaluation and Kinesiotherapy*, Bucharest, Morosan Publishing House, 2011, 193.

⁵ David D., *Clinical Research Methodology*, Iași, Polirom Publishing House, 2006, 211.

report of McCarthy et al (2002)⁶, which noted that severe cerebral palsy is associated with reductions in health and functional status of the subjects. However, it is in contrast with the findings of Tella et al (2011)⁷ that psychosocial aspects of HRQoL (Health-Related Quality of Life) do not vary with differences in severity of motor disability, in the case of health and well-being of children in Arges county-Romania with cerebral palsy.

The negative impact of severity of motor disability on parenting, in the areas of emotional worries/concern and time, shows that parents have many emotional worries about their children's health and motor disability. This may be because these parents are required to spend more time with their children, and this could have a negative impact on their social activities. They may not want to carry children like these for social functions. This is not only because it would require a lot of effort to carry them, but also because of the social stigma. This observation is in agreement with the report of Vitale et al (2005)⁸ which stated that severity of cerebral palsy was significantly associated with parent impact-time, parent impact-emotional and family.

The finding that age is associated with reduced HRQoL in children with cerebral palsy is not surprising. This is because the older the child is, the more he/she will feel the impact of social isolation from peers. There will be more participation restriction coupled with significant activities limitation. This result is in close agreement with the opinion of Melisa and Chee (2002) that physical challenges of cerebral palsy may intensify with age (such as increased spasticity, fatigue, loss of strength and declining mobility). However, it was observed in this study that there was no significant difference between age and physical function, which is in contrast with the observation of Melisa and Chee (2002) ⁹. The lack of association between age and physical function might be attributed to the proxy reporters.

⁶ McCarthy ML, Silberstein CE, Atkins EA, Harryman SE, Sponseller PD, Hadley-Miller NA. (2002) *Comparing reliability and validity of pediatric instruments for measuring health and well-being of children with spastic cerebral palsy*. *Developmental Medicine and Neurology*44(7): 468-476.

⁷ Tella B.A., Gbiri C. A., Osho O. A., Ogunrinu A.E., *Health-related Quality of Life of Nigerian Children with Cerebral Palsy*, 2011, 22:194-199

⁸ Vitale MG, Roye EA, Choe JC, Hyman JE, Lee FY, Roye DP., *Assessment of health status in patients with cerebral palsy*. *Journal of Pediatric Orthopedics*; 2005, 25(6): 792-797.

⁹ Melisa SY, Chee PW., *Impact of cerebral palsy on the quality of life in patients and their families*. *Neurology*; 14: 27-33, 2002.

Self-report information from children themselves might have been more suitable and reliable, to fully understand the impact of age on physical activities of children with cerebral palsy.

Conclusion

The present finding indicates that cerebral palsy has a negative impact on health status and quality of life of children with cerebral palsy, as reported by the respondent parents. Children with cerebral palsy have a reduced HRQoL, and the degree to which it is reduced is directly related to the age and severity of the cerebral palsy. Increasing age and severity of the cerebral palsy have a negative impact on physical function, social role/behaviour, parenting impact (time/ emotion), children's health and their psychosocial function.

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HUMANISTIC FUNDAMENTALS OF FUTURE BIOTECHNOLOGISTS TRAINING

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Abstract: *The features of biotechnology as scientific activities are considered in the article. The prerequisites of humanization of biotechnologists professional activities and humanistic principles of agriculture biotechnologists activities are analysed. Attention is focused on the modern requirements for an individual of a biotechnologist. The need for the formation of future biotechnologists humanistic orientation on the analyse base of the specifics of their professional activities are substantiated.*

Keywords: *humanistic principles, future biotechnologists, professional activities, agricultural industry.*

Introduction

Due to the rapid changes in all spheres of life, especially in education, the problem of training specialists for various industries at higher education institutions is a question of urgent importance. The growing practical need for new technologies designed to eliminate the shortage of food, energy, mineral resources, improve the health and the environment cause advance of professional training biotechnologists.

Attention should be paid to the fact that that further technological advances in the human development can be carried out only under conditions of the moral society creation. Technologies can not be considered in the isolation from the entity who will use them (or who arises to use them), therefore the question of humanistic orientation of biotechnologists professional training is actualized.

The analysis of the scientific literature

The issue of training specialists in biotechnology has been researched by foreign scholars B. Albers, J. Labov, J. Granger, W. Dawson, R. Dobert, P. Narasimharao, J. Rossou, K. Soames, S. Salvado, M. Kazanoves, M.

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Novo, R. Tomson, and in the theory and practice of domestic professional training the question has been elucidated only in the isolated works of N. Ridey, L. Rytikova.

The analysis of scientific literature showed that the issue of training future biotechnologists hadn't been developed sufficiently in theory and practice of vocational education and the problem of forming humanistic orientation of future biotechnologists had never been the subject of research.

The analysis of scientific sources indicates the urgency of forming humanistic orientation of future biotechnologists which is caused by the humanistic tendency of their professional activities.

The purpose of the article is to analyze the humanistic principles of professional activities in the field of biotechnology and substantiate the need for the formation of future biotechnologists humanistic orientation during professional training.

Today the development of biotechnology is one of the main areas of scientific and technological progress. Biotechnology is becoming an integral part of all spheres of life. The range of applications of biotechnological innovations includes biomedicine, food production, environmental protection and the creation of new types of raw materials, fuel and energy, and other.

However, all achievements in this field of science should be based on noosphere thinking, human values, protection of an individual from the negative effects of the use of biotechnology.

Analysis and philosophical understanding of the history of formation and development of biogenous technologies have been conducted by such prominent domestic and foreign scientists, philosophers, biologists, lawyers as J. Rossou, S. Svetlov, L. Sidorenko, V. Soifer, P. Tishchenko, L. Udovika, O. Chumak, Y. Habermas, J. Fayndhold, F. Fukuyama, H. Shumberh, B. Yudin and others. They tried to analyze the nature and the importance of biotechnology in human life in detail. The understanding of the problems of socio-cultural and philosophical character, which is associated with the moral and legal content of biotechnology and its humanistic orientation, is at the sight of many modern scientists. With the development of biotechnological research a subject of general discussion among scientists-biologists is the question of social and moral responsibility for the results of their research. It is connected with those circumstances that on the basis of genetic engineering artificial genetic

systems can be created; intervention can be made in the human genetic apparatus¹.

Scientists emphasize that despite the enormous possibilities of biotechnology to help people in difficult environmental situation its development is unpredictable. The results can be directed against a person.

According to the researcher S. Svetlov, "the paradox of technologies in general is that they are, on the one hand, provide the most favorable prospects for the results of their use (increasing productivity, treatment of diseases, quality of life, etc.) and on the other hand, they offer the possibility of implementing the most sinister plans and fantasies. Everything in the world of technology is manifested in two ways, all technologies can be implemented in two ways – for good or for evil. In this respect we can not attribute to the technologies a positive or negative sign. All they are initially ambivalent, they carry both positive and negative potential. Only man himself chooses which of these potentials will be realized. Critics of biotechnology and critics of scientific and technological progress in general should know and understand this axiom very clearly. Science and technologies themselves can not be "anti-human" or "against society." Only man himself and only society itself use science and technologies against themselves².

Modern scientific and technical progress necessitates a general awareness of the fact that further advances in the technology of human development are possible only under the conditions of the moral society creation. The technological powers of man are so significant. If they get into evil hands, not only big local and even global catastrophe will become possible. In this plan biotechnology provides good examples: even an immoral single person who has the latest biotechnological methods can potentially cause a global biocatastrophe³.

Thus, the analysis of contemporary philosophical and ethical, social and philosophical literature shows that despite the high technologically evaluation of biotechnology the main question is its humanistic content. So, the tendency to unity of research instructions and their humanistic

¹ Sidorenko, L. I., *Philosophical analysis of the development and biotechnological research prospects*, Kyiv, 1987, p. 124.

² Svetlov S.V., *Problems of perfection of humanity, Development of biotechnology, or "improving morality"*, Materials of the IV scientific conference, 16-17 April 2004, Irkutsk, pp. 164 - 168.

³ Gorokhov, V., Rozin V. M., Alexeyev I., Aronson O., *Philosophy of Technology: History and Modernity*, monograph, Moscow, 1997, p. 238.

orientation has to realize in developing biotechnological research, in biological knowledge.

Humanistic orientation of professional biotechnologists' activities

In view of this, let us consider the specifics of the biotechnological area, which is presented in two forms of activity: 1) in the form of scientific activity, carried out by scientists-biotechnologists; 2) in the form of practice or technological process in the production which involves experts from biotechnology (biotechnologists, genetic bioengineers, bioprocess engineers, bioengineers of cell and tissue, engineers of restoration of natural ecosystems, biotechnologists of pharmaceuticals).

The product of scientific work of biotechnologists is knowledge of biotechnology. Work of a scientist-biotechnologist is characterized of general nature and related to the production of special product – knowledge of methods, techniques and technologies of biosynthesis. Profession of a biotechnologist requires specific highly professional knowledge, skills, experience and expertise, that allows to speak about specific personal qualities of a subject of biotechnology. In biotechnology man acts like a natural force, changing and creating different forms of life. Scientific activity obtains characteristics of engineering and production activities being a form of spiritual production. Different areas of bioengineering help to become a biotechnologist essentially a designer of new organisms or new relationships between them. However, noting a similarity of bioengineering stage with other areas of engineering, we can not see their significant differences. In the case of biotechnology researchers and practitioners deal with the world of living. It imposes some restrictions and prohibitions on practical activities.

The nature and direction of biotechnologist's activity have their specific characteristics.

Qualification of a biotechnologist envisages a high level of special scientific knowledge, a broad outlook in modern achievements of world science, high skills of an experimenter, originality of a scientific thought. A specialist in the field of biotechnology must be professional, able to combine complex research, design and commercial activities, oriented on creating highly efficient structures stimulating the growth and the development of various spheres of social and economic activities. As a whole, a subject of biotechnology performs an important social role – not only make life more comfortable, but also convert all human being directly. Project activity of a subject of biotechnology is directed on

creating appropriate models in biotechnology and the principles of bioethics. In this regard, it is especially important humanistic ideals formed in the minds of scientists-biotechnologists. Humanistic ideals are connected with the recognition of the life value, the affirmation of the principle "reverence for life" advanced by A. Schweitzer⁴.

Analyzing the activity of a subject of biotechnology, we have come to the conclusion that the main characteristics and his features are: common goals and humanistic orientation of activity, professionalism, mastery of experience, skills, and abilities in this field. These characteristics are reflected in the spiritual and personal qualities. They are manifested in professional knowledge, communication, language, ideals and consciousness of scientists-biotechnologists.

The transition to an information society raises new challenges to the nature and quality of professional activity of highly qualified specialists, especially for the agricultural field. In the new environment it is necessary a new professional, social and psychological model of a biotechnologist-humanist, who is not only able to manage skillfully and use of modern biotechnology, but also has a high moral character, sense of responsibility before the society for "the cultivation of genetically modified organisms, accumulation of carcinogens and harmful mutations; experiments involving genetic code alteration, posing a threat to humans not only in local but also a global dimension"⁵.

Professional activities of a biotechnologist in the agricultural field has to be determined by several factors: ethical, psychological, aesthetic and so on. The value aspects, for what a biotechnologist of the agricultural sector is responsible, include the following:

- human health is defined as the most important value. Food crop and livestock produce should not pose a danger to human health. It is necessary to abandon from harmful agricultural technologies due to research and assessment of the impact of professional activities.

- agricultural activities should be combined with the surrounding natural environment.

⁴ Vorontsova, Z. I., Valeological component of biogenic technologies Education and Health, Economic, health and social problems, Materials of the IV International. scientific-practical conference, Penza, Volga House of Knowledge, 2009, pp.15-22.

⁵ Sydorenko, V. K., Where do teachers train for farmer?, Theory and methods of professional education, scientific reading of Professor Viktor Sydorenko, Materials of V International Conference, Kyiv, National University of Life and Environmental Sciences of Ukraine, 26-27 February 2014, pp.11- 13.

The moral relationship to nature includes humanistic aspect, based on the understanding that the damage to the environment is an equivalent to the harm caused to future generations of people.

- everything that happens in agriculture is directly or indirectly related to the individuals whose work is defined conscious or unconscious intentions, values which are occupied a dominant position at the present stage of social and technological development. Business results in agriculture should be attached to the actions and intentions of the actual people.

Consequently, activity of a biotechnologist in agriculture on the humanistic base involves the following principles:

- professional activity for the benefit of the society;
- preservation of biological authenticity of nature as such in the terms of scientific and technological progress and development of genetic engineering;
- creation of safe conditions of social life;
- avoiding the use of agents and technology that may have negative effect on human health;
- risk prevention by means of the use of biotechnology;
- prediction of consequences of the use of biotechnology;
- improving the quality of agricultural products, methods of production and processing.

Focusing on the above, it can be argued that the activities of a biotechnologist in agriculture should be humanistic oriented. It means that the main measure of his activity is the welfare of people. To achieve this purpose educational process is to form students certain qualities, positive attitude to the responsibility and duty to the state. Vocational training at high school should have a close relationship with professional orientation of an individual, with the formation of a specific system of values inherent to the representatives of the biotechnology field.

Conclusions

So, formation of humanistic orientation of an identity is the particular importance for a biotechnologist professional training because it is an integral part of professional activity of a future specialists and humanistic trends in biotechnology determine its important role.

It should be emphasized that the importance of humanistic orientation of professional activities of biotechnologists essentially is higher than for the vast majority of other professions. The exception is medical profession and some other professions related to the life and health of people. Application of the principle of humanism in professional activities of other professions due to its axiological character is not strictly required. They have the wide rights and they are mostly sanctioned by the power of influence of public opinion.

Thus, the humanistic principles of professional activities of biotechnologists in agriculture and modern requirements for the individual of biotechnology actualize the need for forming humanistic orientation of future specialists in the professional training.

The theoretical position of the essence, the features of activities of biotechnologists are fundamentals for the development of theoretical and methodological, methodological and technological aspects of the problem research of forming humanistic orientation of future biotechnologists.

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PERFORMANCE WITHOUT REDUNDANCY - SERVICE ORIENTED ARCHITECTURE (SOA)

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Abstract: *In a dynamic world like that of "today", companies must adapt more easily to changes. In such a world, strategies for reducing costs and obtaining results in a short time are developed. In such a situation, the computer systems within companies in particular are directly aimed in order to optimize the processes they perform. In this regard, in this paper, I will present a way through which one can remove both the redundancy occurring during the development/modification process of computer systems and the resources used inefficiently (human resources, time, etc.). The solution the features of which I will present in the first part of this paper is called Service Oriented Architecture (SOA), while in the second part, I will present the benefits and drawbacks of SOA, customizing the presentation on concrete situations and proposals.*

Keywords: *Service Oriented Architecture, Information System, Web Service*

1. Introduction ...or about the "redundancy" into information systems

Currently, the complexity of operations conducted through computerized systems in companies is very high. Therefore, the "redundancy" of developing similar software modules used by different applications/ computer systems, is "translated" by: time, human and material resources inefficiently used. On the other hand, companies are "facing" very high maintenance costs of the computer systems already developed but also the increased "mobilization" of human and technical resources, when they pursue the modification or addition of new developments / improvements to the existing systems.

Beside the "shortcomings" previously mentioned, a new problem that emerged in recent years in the business environment is the ability to

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integrate computer systems developed in different periods of time using different technologies.

How could today's technology respond with solutions to the above problems, so that the solution to be implemented would be an "investment" in the future, with maximum flexibility and minimum costs? By analyzing the research literature, we see as a possible "answer" the Service Oriented Architecture (SOA). Therefore, next I will present the main features of SOA and I will highlight the benefits and drawbacks of implementing this technology in business.

2. How is working service oriented architecture (SOA) ?

"Service Oriented Architecture (SOA) is an architectural approach by which an application is made up of independent components, distributed and interacting, called services. A collection of such services make up an application. Services may be distributed inside or outside of an organization's physical boundaries or areas of security. Moreover, the various components of a service may exist on different platforms and can be implemented using various programming languages."¹ In other words, SOA is the "evolution" of the distributed computing based on the request/reply "design" for synchronous and asynchronous applications.²

The key components of a Service Oriented Architecture are:³

- the messages that are exchanged,
- agents that act as service requesters and service providers,
- shared transport mechanisms that allow the flow of messages.

Each SOA building block can assume one or more of three roles:

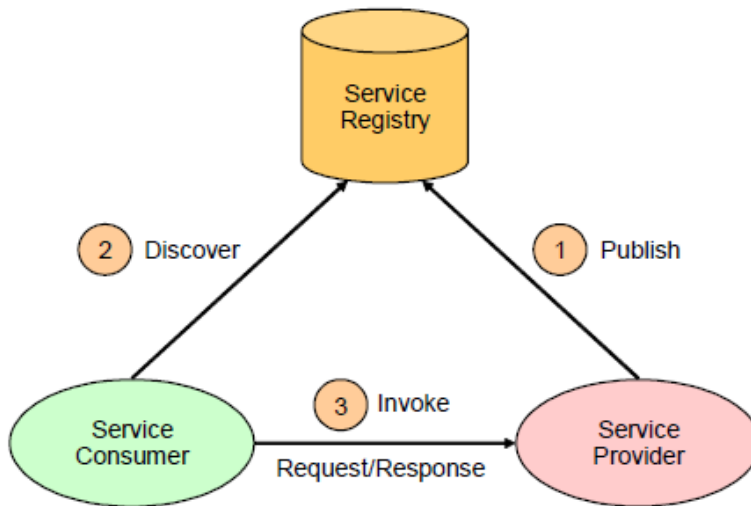
- a) Service provider;
- b) Service broker/ Service registry;
- c) Service requester/ Service consumer.

¹ Mancaş, D., *Applications for Grid Systems course*, University of Craiova, Faculty of Automatics, 2015.

² Kodali, R.R., *What is service-oriented architecture? - An introduction to SOA*, *JavaWorld*, Jun 13, 2005.

³ Red Hat Company, J. Boss Enterprise SOA Platform 4.2, SOA ESB Registry Guide, 1.4. SOA, 2015.

Figure 1. SOA - Roles and relationships



Source:⁴

"Each component can also act as one of the two other components. For instance, if a service provider needs additional information that it can only acquire from another service, it acts as a service consumer. Fig. 1 shows the operations each component can perform:

- The *service provider* creates a service and in some cases publishes its interface and access information to a service registry.
- The *service registry* is responsible for making the service interface and implementation access information available to service consumers.
- The *service consumer* locates entries in the service registry and then binds to the service provider in order to invoke the defined service."⁵

"SOA (Service Oriented Architecture) can be composed of services developed using the layered style (organized in layers) and the object-oriented style. Also, you can choose the 3-Tier style (on three levels) or n-

⁴ J2EEBrain, *A collection of java j2ee tutorials*, Basic Components of SOA, 2015.

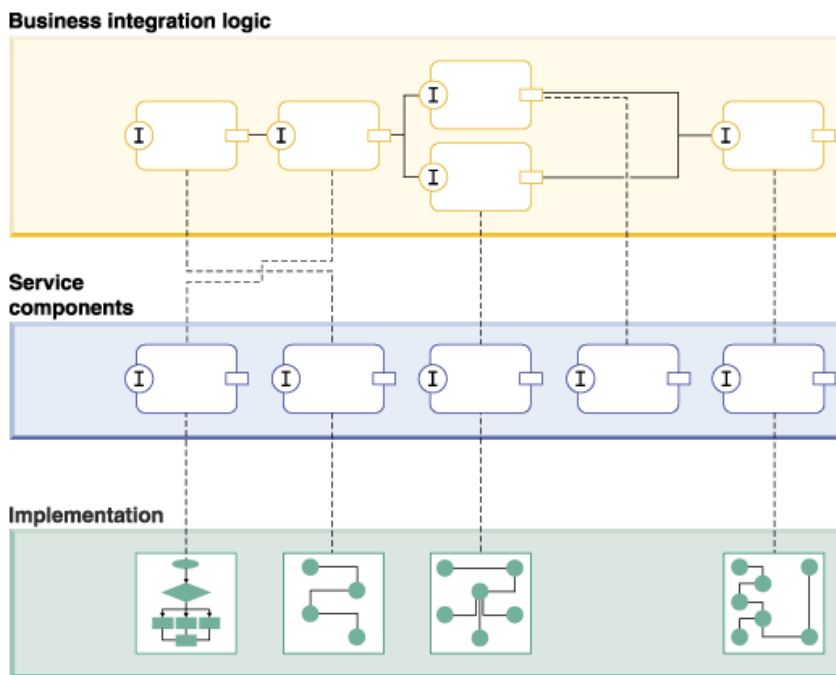
⁵ Harris, T., Harris, Torry, *Business Solutions*, SOA Test Methodology, 2007.

Tier (on n levels) when the emphasis is on the security requirements."⁶

The purpose of service oriented architecture is, as was expected, to separate the operational integration logic from implementation. An example of SOA architecture on three layers can be seen in Fig.2, the components thereof being:

- logic of operational integration;
- service components;
- implementation.

Figure 2. SOA - Three-layer architecture



Source:⁷

As can be seen in Fig. 2 as well, “an application's business logic or individual functions are modularized and presented as services for consumer/client applications. The key to these services is their loosely coupled nature; i.e., the service interface is independent of the

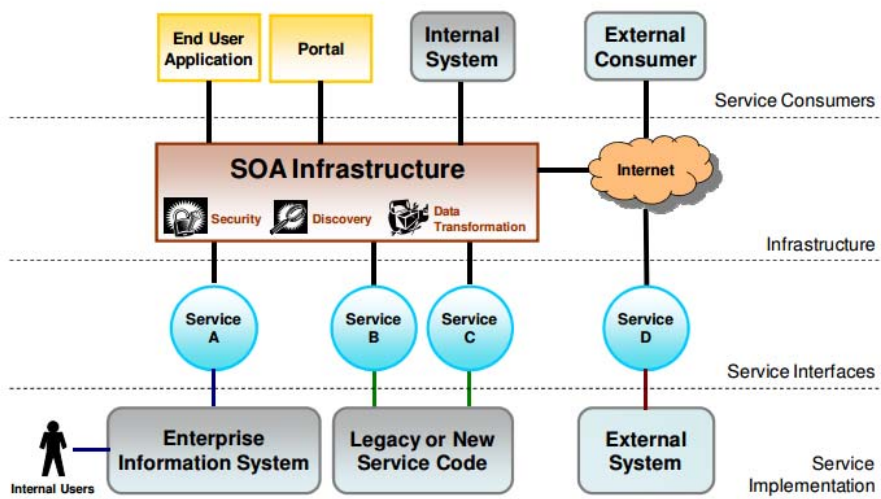
⁶ Smeureanu, I., Isăilă, N., *Coupling active components to achieve innovative learning environments*, Romanian Journal of Human-Computer Interaction, vol. 6, no.1, 2013, pp.23-34.

⁷ IBM Knowledge Center, Service-oriented architecture, 2015.

implementation. Application developers or system integrators can build applications by composing one or more services without knowing the services' underlying implementations. For example, a service can be implemented either in .Net or J2EE, and the application consuming the service can be on a different platform or language.”⁸

Customizing the architecture above, based on the characteristics of a company in terms of information systems, it can be seen in Fig. 3 below, clearly how the services offered by SOA infrastructure once developed and implemented become resources that can be reused by connecting them to any information system, that is to use information provided by the services already developed, without new investment.

Figure 3. SOA - High-Level View of a Service-Oriented System



Source:⁹

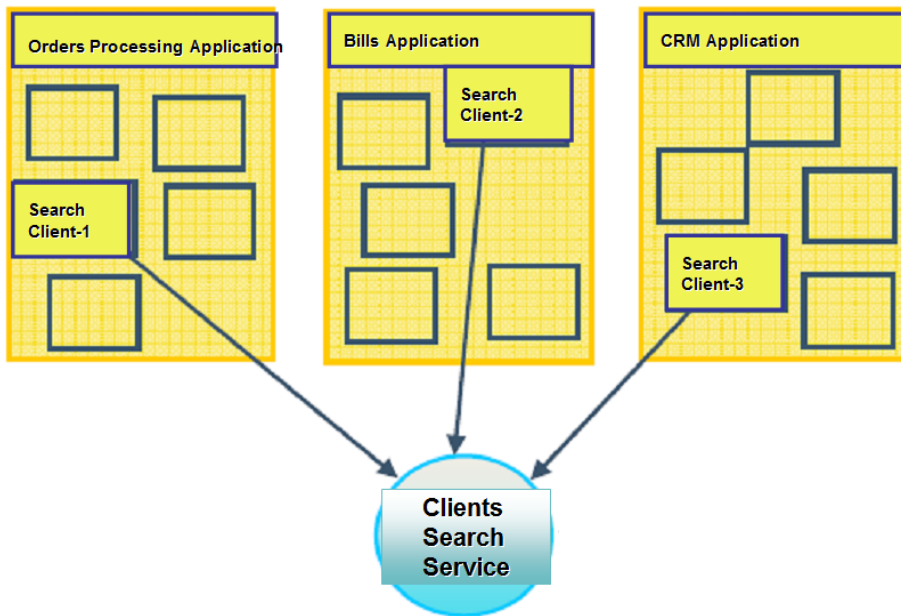
In Fig. 3 above, we can see how through SOA infrastructure, one can extract information from the databases of the various information systems of a company (Portal, End User Application etc.) and from its external information systems (through Internet) and via services (interfaces A, B, C,

⁸ Kodali, R.R., *What is service oriented architecture? - An introduction to SOA*, JavaWorld, Jun 13, 2005.

⁹ Software Engineering Institute Carnegie Mellon University, Pittsburgh, *Getting Started with ServiceOriented Architecture (SOA) Terminology*, 2015.

D), the extracted information is made available to other information systems internal/ external to the company. In the "classical" manner (without implementing a SOA), an additional and redundant effort of development and adaptation of information systems that use data from their storage and processing in other information systems would have been required. For example, in Fig. 4 it can be seen how a service (customer search service) is used by 3 applications (Orders Processing Application, Bills Application, CRM Application) without additional developments for each application in order to access the data it needs.

Figure 4. SOA - Example: service with the same functionality implemented in multiple applications



3. Web services implemented in the service oriented architecture (SOA) "STYLE"

According to the authors¹⁰, Web services are technologies which develop continuously, predominantly used to implement service-oriented architecture and involves a model based on communication between programs built on the XML standard for specifying data. Web services do not impose a certain protocol for communication therefore any

¹⁰ Mancaş, D., *Applications for Grid Systems course*, University of Craiova, Faculty of Automatics, 2015.

communication protocol such as HTTP or JMS can be used to exchange messages.

With regard to grid services, Web services use:

- Web Services Description Language (WSDL) to describe the content and use;
- Simple Object Access Protocol (SOAP) standard as protocol for messaging between two Web services;
- Specification Universal Description, Discovery and Integration (UDDI) to enable WEB providers to register their services and users to locate the most suitable service provider.

For a clearer understanding of web services, their main properties are shown below (adapted from):¹¹

- *Web services are self-contained:*
 - client side: no additional software is required (A programming language with Extensible Markup Language (XML) and HTTP client support is enough to start);
 - server side: a web server and a SOAP server are required.
- *Web services are self-describing:* the definition of the message format travels with the message and no external metadata repositories or code generation tool are required.
- *Web services can be published, located, and invoked across the Internet:* this technology uses established lightweight Internet standards such as HTTP and it leverages the existing infrastructure. Some other standards that are required include: SOAP, Web Services Description Language (WSDL) and UDDI.
- *Web services are language-independent and interoperable:* the client and server can be implemented in different environments.
- *Web services are inherently open and standard-based:* XML and HTTP are the major technical foundation for web services.
- *Web services are dynamic:* with UDDI and WSDL, the web service description and discovery can become automated.
- *Web services are composable:* simple web services can be aggregated to more complex ones, either using workflow techniques or by calling lower-layer web services from a web service implementation.

¹¹ IBM Knowledge Center, Web services approach to a service-oriented architecture, 2015.

- *Web services are loosely coupled*: web services require a simpler level of coordination that supports a more flexible reconfiguration for an integration of the services.
- *Web services provide programmatic access*: the approach operates at the code level.
- *Web services provide the ability to wrap existing applications*: Already existing stand-alone applications can easily integrate into the SOA by implementing a web service as an interface.

From the above description, it is very easy to follow and understand the complexity and "versatility" of SOA use particularly in a company. However, I believe that the true "challenge" appears only when a company has a number of information systems that communicate in a "classic" manner between them, but wants to implement SOA for more flexibility. Therefore, we will continue to analyze gradually both the advantages and disadvantages of SOA implementation, making some proposals on the implementation of SOA in companies that want to move to the implementation of this architecture for the information systems already developed.

4. Service oriented architecture (SOA) "IMPLEMENTATION"

SOA allows reuse of existing "investments" (development) of a company and the creation of new applications starting from existing ones. On the other hand, SOA allows modification of services individually, so there is no need to rewrite an entire application (as it happens in a "classic" way) if it requires changing a functionality of the information system.

Also, an important advantage is that during new developments or changes in existing applications through SOA, customers do not "feel" these changes during these processes, as they are "isolated" and the functionalities of the systems with which they were accustomed remain in perfect operation condition. This means in fact that SOA enables companies to have more flexibility (working in an agile manner) in the development of applications but also in adapting information systems to business processes. It should be noted that flexibility in business processes results in the decrease of the costs of implementation and maintenance of information systems.

As expected, besides the advantages mentioned above, SOA has "limits" that must be taken into account when implementing such architecture:

- *Network connections*: "If the architecture and services are highly interconnected then even a partial network failure may create a

huge problem for the relevant organizations. Currently, although the required technology is available, there is no guarantee that infrastructures will be robust with enough redundancy to cope with the system downtimes.

- *Security*: When using open standards, a service is much more open to other services and applications than a monolithic application and thus security becomes an issue.^{"12}
- *Evolutionary development*: Building and updating services is fine. However, if applications continually require additional functionality, and these requests are granted, the entire system may become unstable¹³.
- *SOA would not be suitable for applications*:
 - with GUI functionalities. Those applications would become more complex if they use SOA which requires heavy data exchange.
 - the application requiring asynchronous communication can't make use SOA.
 - in case of standalone and short lived applications' implementations, SOA is not the best choice.

Implementing SOA in a company is one of the most complex possible activities, especially if the information systems that will interconnect as such are in a design stage. Problems arise when companies with a significant "history" of computing systems use monolithic systems that it wishes to interconnect via SOA. In this case, the complexity comes on the one hand, from the fact that monolithic systems must be disconnected from the current ways in which they receive data and reconnected module by module through SOA, the entire process being performed in a short time and if possible "transparent" to the user and while meeting the security of data transferred. The best known example of successful SOA implementation is the example of Amazon.

As in recent years, cloud computing has "gained" increasingly more "ground" becoming increasingly better known and used, companies currently can also implement SOA in cloud computing. This means that the same SOA characteristics can be used with cloud computing: "a service

¹² Mahmood, Z., *The Promise and Limitations of Service Oriented Architecture*, International Journal of Computers, Issue 3, vol. 1, 2007, pp. 74-78.

¹³ Clark, L., SOA gathers pace in the enterprise, Computer Weekly, UK, 26 Sept 2006.

provider can be in a Cloud or not in a Cloud and a service-oriented architecture (SAO) can involve any combination of Clouds and Non-Clouds".¹⁴

Beside the use of SOA within companies, I believe that a use which might be a success would be using SOA for the interconnectivity of information systems for Public Administrations, where for example the "citizen authentication" service would be the same regardless the public institution to which the computer system belongs (e.g. City Hall, Police, etc.). I also believe that other areas that can "compete" successfully in using SOA are the financial and advertising field.

5. Conclusions

Following at present, the activity of a company on the manner of operation of the information systems, it can be seen that they are hard to change, adapt to the new demands of the business environment in constant change. Therefore, each new update or each new module added in an existing information system is "translated" by needlessly consumed resources and redundancy in implementation.

To emphasize the fact that the problems mentioned above can be avoided or overcome, I have synthesized in this paper, gradually the characteristics of SOA, exemplifying them on cases and concrete proposals so that this paper will become a starting point in the understand of the Service Oriented Architecture (SOA), its advantages and disadvantages and the realization that SOA is a solution worth taking into account when trying to integrate information systems, both existing (e.g. monolithic) and of those which are to be developed (e.g. e-government solutions).

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