

BELVEDERE

MERIDIONALE

TÖRTÉNELEM ÉS TÁRSADALOMTUDOMÁNYOK XXXVI. ÉVFOLYAM 1. SZÁM

inequalities
narratives
workforce ^{networking}
identity youth rural
trust faith ^{development}
^{livelihood} roma
participation
students reskill
school ^{upskill}

Editor of thematic issue: Pászka Imre



– MMXXIV TAVASZ –

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Kiadja a Belvedere Meridionale Kft.

Technikai szerkesztő: Szabó Erik, s-Paw Bt.

ISSN 1419-0222 (print) ISSN 2064-5929 (online, pdf)

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Hungarian Secondary School Students' Views on the Tasks of the Student Council (DÖK) and Their Participation in It¹



ABSTRACT

The Student Council is the body that represents and protects the interests of secondary school students and organises their social and cultural life at school. In Hungary, it is called a student self-government (diákönkormányzat, DÖK) in the Public Education Act. The Public Education Act gives the student council wide-ranging rights. The DÖK is one of the most important non-formal educational arenas for the development of civic competences, where the views of students are formed, their opinions are nuanced, and their knowledge can become skills and competences. The basic condition for this is individual and community activity and active participation, the development of which is a central tool for the social integration of young people. Participation in the framework of this study means participation in everyday life and decisions of the community, rather than mere organizational membership: ways of thinking and activities that are based on the world of social values and are reflected in public action and patterns of action. In this study, we also wanted to gain a deeper understanding of how do students' responses paint a picture regarding the role of the DÖK as a "democracy school". The self-governments of secondary school students are not only formed within the framework of the social climate and institutional microclimate, but they can also shape it reflectively when these frameworks

¹ Student Council is a group of students in a school who are elected to help plan and organize activities and events for other students. In Hungary, the Student Council is the body that represents and protects the interests of secondary school students and organises their social and cultural life at school. In Hungary, it is called a student self-government (DÖK) in the Public Education Act. The members of the school student council (DÖK) are usually elected by class. The DÖK determines its own operational framework. Provisions describing the functioning of the DÖK are incorporated into the school's internal rules (e.g. house rules) after approval by the school management. The Public Education Act gives the student council wide-ranging rights. In this study, Student Council is referred to as DÖK (Diákönkormányzat, Student Self-government).

are sometimes expanded. In this study we will examine the presence of conformity and the ability to innovate in relation to the DÖK, i.e. what patterns can be seen in the students' views on the functions and role and task assumption of the DÖK, and in the relationship of intention to participate in them.

KEYWORDS

youth, active participation, student council, student self-government, Hungary

DOI 10.14232/belv.2024.1.1

<https://doi.org/10.14232/belv.2024.1.1>

Cikkre való hivatkozás / How to cite this article:

Jancsák, Csaba (2024): Hungarian Secondary School Students' Views on the Tasks of the Student Council (DÖK) and Their Participation in It. *Belvedere Meridionale* vol. 36. no. 1. pp 5–23.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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INTRODUCTION

At present, according to the current public education legislation, student councils (student government, Diákönkormányzat, DÖK) have the right to initiate, propose, opinion form and express of opinions on a number of issues that significantly impact the life and organizational character of institutions. One of these rights that is generally known is that the opinion of the DÖK must be sought: before the adoption of the school's organizational and operational regulations defined by the statutory provisions of the school SZMSZ, before determining the principles for the distribution of student social benefits, and when using funds allocated for youth policy purposes. It is also the DÖK's responsibility to form an opinion before adopting the school's house rules. The student council represents the interests of students towards the school administration, towards the maintainer, and on the school board consisting of representatives of parents, faculty members and members of the student council in equal numbers. It is a little-known and less frequently seen right to make proposals (concerning the student government) in everyday practice, according to which the DÖK may express an opinion and make proposals on all issues related to the operation of the educational institution and students. It can be deduced from the legislation that only a functioning student government can ensure that students can exercise their rights provided by law (directly or through representation), and that the legal operation of the given institution can only be ensured by a well-functioning student government. Hungarian

educational research at the turn of the millennium drew attention to the fact that these added values and value transfer processes are less prevalent in institutions' everyday operations (SZABÓ – ÖRKÉNY 1998; LIGETI 1999, 2000a, 2000b; CSAPÓ 2000, LIGETI – MÁRTON 2001, KINYÓ 2012).

At the same time, the DÖK is not only an actor on the stage of institutional education, which means not only a system of representation, but also a democracy school for children and young people, which is a space for civic education, a space for the formation and development of an active and active civic mentality culture, and in relation to enculturation, a non-formal educational space that goes beyond the provision of knowledge and value socialization within the framework of civic education subject processes.

Several works were published on the DÖK in the nineties, parallel to the process of democratization of educational institutions, with a focus on community and public socialization (TRENCSÉNYI 1993, PAPP – PÁL 1993, GAÁL 1994, DÁVID 1995, SZABÓ – ÖRKÉNY 1998, LIGETI 1999), and in the period after Hungary's accession to the European Union, the topic again came to the forefront of interest, primarily with a focus on the active participation of youth (LIGETI – MÁRTON 2001, KÁLMÁN 2003, BARACSI – HAGYMÁSY – MÁRTON 2009, KÁTAI 2006). However, partly because of the social, educational and educational changes that have taken place in the last decade, and partly because of the new challenges facing the world of school and youth, we have to say that further research is needed for a deeper understanding of this topic. At the same time, the topicality of the topic is indicated not only by the demonstrations/protests taking place with the participation of secondary school students due to changes affecting the education system, but also by the fact that in the regulatory system of education and education it seems that "great emphasis has been placed on youth and student council, yet young people are not reached by these institutions, and young people do not even feel that they have a say in public affairs" (KERPEL-FLORIUS – NAGY – FAZEKAS 2020. 363).

In the case of young people, the devaluation of trust in decision-making systems and dissatisfaction with traditional forms of participation in public life and youth organizations is not a new phenomenon: they were already interested in research at the birth of European youth sociology (MANNHEIM 1952), and at the beginning of the two thousands, European states were already strongly interested in professional policy actions and social innovation developments in the political structure of their community (eg. White Paper 2001) and youth research (YOUNISS et al. 2002, DUDLEY – GITELSON 2003, LETKI 2004, ZELDIN 2004, CHECKOWAY 2006, GINWRIGHT – CAMMAROTA 2007).

In the second decade of the new millennium, new types of youth activities appeared, which were typically born from the professional use of info-communication technologies (internet, smartphone, web2, social networking sites) and the network of virtual youth communities (JANCSÁK 2013, THEOCHARIS 2015, IGNATOVA 2023). Nevertheless, alienation from European electoral politics does not mean that young people are apathetic about public life (SLOAN 2014.), but rather that they engage in different activities and intensities than the parents' generation (and even instead of traditional age-group representation frameworks such as youth councils – cf. TAFT – GORDON 2013) (see also SAUNDERS et.al. 2012, VAN DETH 2014, THEOCHARIS – VAN DETH 2018).

Our time is characterized by instability and uncertainty caused by the crisis of consensus norms and social values. Economic and political crises, new migration flows and technological

changes have created new vulnerabilities among young people. The phenomenon of the crisis of values extended to the social values of freedom, solidarity, empathy, autonomy and responsibility, that is the crisis of universal humanist values appeared, and in this context, exposure to the manipulations of the post-truth era intensified (JANCSÁK 2020a). At the same time, secondary school life can represent significant added value for the later civic life of generations currently growing up in school, when young people are prepared for conscious and active citizenship roles, embracing social values through education, and knowing and creatively interpreting elements of our past and culture. Can secondary schools and the student government system take advantage of this opportunity, and can they meet this challenge?

The world is the frame of reference for young people, therefore youth organizations not only filter and interpret social reality and impulses coming from social space, but also shape it themselves. Therefore, student movements have the potential to initiate significant social change if they are supported by other economic, demographic and social forces (GORDON 2000). Young people want to take an active part in society around them. If they are excluded, this also means that democracy is not functioning properly. (Council of Europe 1992). The basic condition for the existence of a living society is the active participation of citizens in the social, political, cultural and economic fields (REKKER et al. 2015, PONTES 2018). In the case of young people, it is particularly important to learn the necessary competencies related to volunteer activities (QUINTELIER 2015, RODRIGUES – MENEZES – FERREIRA 2024). The aim here is not only to develop knowledge, but also to motivate, acquire and experience an active civic role (SIURALA 2002, HOSKINS – SAISANA – VILLALBA 2015)

One of the tangible products of the development of European democracies over several centuries in terms of social organization is the widespread application of the principle of subsidiarity. Subsidiarity does not mean only and not primarily territorial division, but also a rational division of tasks. This is especially true in the world of education, where the student council (DÖK) has become increasingly involved. Various local governments are the basic tools for preserving the functioning of democratic institutions. These specific organizational frameworks of social self-management are equally suitable for representing values and interests. The delegation of raising and settling questions and problems is evident for the stakeholders in the educational scene. Raising problems, proposing solutions, participating in decision-making and implementation are tasks that can be trusted by students who treat the scene as their own.

In the course of our research, (1.) we examined how students think about the functions and tasks of the DÖK, see the possible roles of the student government in a narrower or broader framework, and (2.) to what extent do they consider the search for answers to the challenges and the solution of problems that appear in the world of the school's students in the new millennium as role expectations of the DÖK?

Currently, the student government is one of the most important non-formal educational arenas for the development of civic competences, where the views of representatives and representatives are formed, their opinions are nuanced, and their knowledge can become skills and competences. The basic condition for this is individual and community activity and active participation, the development of which is a central tool for the social integration of young people. Participation in the framework of this study means participation in everyday life and decisions of the community, rather than mere organizational membership: ways of thinking and activities

that are based on the world of social values and are reflected in public action and patterns of action. (3.) In our research, we also wanted to gain a deeper understanding of how do students' responses paint a picture regarding the role of the DÖK as a "democracy school".

The self-governments of secondary school students are not only formed within the framework of the social climate and institutional microclimate, but they can also shape it reflectively when these frameworks are sometimes expanded. From the perspective of types of adaptation, starting from Merton's (2000) theory, we will examine the presence of conformity and the ability to innovate in relation to the DÖK, i.e. what patterns can be seen in the students' views on the functions and role and task assumption of the DÖK, and in the relationship of intention to participate in them (4).

METHODOLOGICAL NOTES

In the first phase of the research launched in 2023, we conducted three focus group interviews at three locations (Szeged, Pécs, and Debrecen) with the aim of specifying our questionnaire based on the knowledge gained from this. An eight-page paper questionnaire consisting of 36 sets of questions, containing both closed and open-ended questions, was used as a data collection tool for the research. László Hamvas and Rita Mária Kiss contributed to the development of the questionnaire, János Lőrinczi helped me in data analysis. The anonymous, self-completed questionnaires were completed by secondary school students in grades 11 and 12 (16-19 years) from April to May 2023 (N=374). The filling was done using the easy access method in secondary schools that responded positively to our request (10 grammar schools and 8 vocational schools²).

RESULTS

Of the young people in the sample, 48% are boys and 52% are girls. Two-thirds of technical school students are boys, while 61% of the secondary school students are girls. Of the 374 respondents, 21 boys and 20 girls are members of their school's DÖK, representing one-tenth of the total number of respondents. According to the age distribution of respondents, 16-17 year olds (62%) are slightly overrepresented in the sample compared to 18-19 year olds.

Just over one-third of the respondents indicated that they were interested in politics (36%). Interest in politics was more prevalent among boys, while almost half of boys reported this, only 39% of girls, a significant difference ($F=8.115$, $\text{sig.}<0.05$; $t=1.918$, $\text{sig.}<0.05$). Interest in politics does not vary according to the age of the respondents, almost half of all age groups are interested in politics. Interest in politics is more prevalent among secondary school students (47% indicated it, compared to one-third of students in vocational secondary schools/technical schools). Members of DÖK expressed a higher proportion of their interest in politics than non-DÖK members. Two-thirds of those in the DÖK group indicated that they are interested in politics.

² Within the framework of this research, vocational secondary schools = technician training school, where preparatory training for secondary school leaving examinations is carried out (high-school graduation).

The majority of respondents live in cities (34% in county seats, 33% in other towns and 2% in the capital), one-third of the students live in small settlements (28% of respondents live in villages, and 3% live on farms).

Just over half of the respondents had fathers with secondary education (26% with vocational education, 34% with a high school diploma), 36% had a college diploma, and 4% had fathers with 8 primary education. Similarly, 4% of the students whose mothers had completed primary school. The mothers of two-thirds of the respondents has a secondary education (18% skilled workers, 34% with a high school diploma). 44% of respondents had a degree. Active citizenship mentality culture and interest in public issues are significantly linked to family socialization (JANCSÁK 2020a, 2020b), therefore, we assume that different patterns emerge in the perceptions of student self-government and participatory activities based on parents' educational qualifications.

One-fifth of respondents use the Internet for 1-2 hours on weekdays, half of the respondents use 3-4 hours and one-third more than 5 hours. On weekends, this time increased among students: two-thirds of respondents spend more than five hours online, while nearly one-third spent 3-4 hours online, and only 7% spent less than two hours. The deeper patterns of this time spent were not examined at the time of this data collection, i.e. how much of this amount of time is accounted for, e.g. online contact, entertainment or obtaining information. Research conducted among Hungarian youth age groups (SZÉKELY 2020, GULD 2022) indicated that internet use means less getting information on public and political topics and activities of public activity in virtual spaces than entertainment. This is in line with the results of our survey of secondary school students in 2019 (Our memory 2019, N=317, see JANCSÁK 2020a), according to which the time spent on the Internet is inversely proportional to the commitment to conscious civic roles (and interest in history). From this point of view, we assume that in the case of the tasks of the DÖK and the intention to participate in it, we will find the same phenomenon in the case of the 2023 data collection, i.e. those who use the Internet more are less receptive to public participation in schools.

While 8% of respondents are optimistic about the future of society (41% pessimistic and 51% "is-is"), we see the reverse picture when it comes to their own future, with two-thirds of respondents optimistic about their own future (5% pessimistic and 32% "is-is"). During our initial assumptions, we believed that optimism/pessimism towards the future of the personal and society shows a different pattern in relation to the task and role realization of the DÖK.

More than two-thirds of respondents indicated that they needed help because of a violation of their rights. In such cases, parents (28% of those affected), friends (14%), siblings (8%) or teachers (5%) were most likely to be contacted, and least likely to the DÖK or the school child protection officer (only 1-1% of those affected). We assumed that the experience of violation of rights meant different opinions and commitments regarding student advocacy, tasks and participatory activities.

TASKS OF THE DÖK

During our research, we were primarily interested in the tasks students expect the school student government to perform.

In our questionnaire, we first asked students to describe what they thought is the most important function of the DÖK. The answers were divided into eight groups and we were able to

conclude that the most important functions are the exercise of advocacy functions (120 mentions) and the organization of programs and events (95 mentions), which are considered the most important functions of the DÖK. 34 mentioned community organizing and community building, 18 mentioned improving the relationship between students and teachers, the same number mentioned assessing student needs and gathering ideas, and 13 mentioned tasks related to providing information to students. In addition, five students believe that managing conflicts between students and two respondents believe that finding sources is the most important function of the DÖK.

From the data obtained by the following closed set of questions, we were able to conclude that students – not surprisingly – see the task of the DÖK and the representation of student interests in this area as important in the case of the policy that represents the everyday framework of the school's microworld (indicated by 90%). For students, representation also means that the DÖK should ask for students' opinions before taking a position (89%). The same representative role is represented by taking a stand on issues affecting students, which should also be implemented towards the head of the institution (84%) and through the institution's internal communication channels (e.g. school radio, FB group) (according to 81% of respondents). For the vast majority of students, making decisions related to the DÖK's own operation (83%) is an emphasized task, similarly to supporting initiatives taken by non-DÖK students (72%). The majority of students consider initiatives aimed at community life activity (73%) to be part of the DÖK's responsibilities rather than making decisions related to community life (58%).

According to two-thirds of respondents, student council members are responsible for youth and civic activities outside school gates: organizing joint actions with other schools' DÖKs (65%), involving students in local civil society actions (e.g. helping the elderly, environmental protection or volunteering) (61%).

A smaller proportion of respondents (45%) consider it the task of the DÖK to represent student interests in cooperation with other DÖKs in the case of the settlement, and the same proportion also indicated that they believe that it is the task of the DÖK to express its opinion on student disciplinary matters.

From the answers received to the closed set of questions, it emerged that students consider it important to implement roles that activate/stimulate and support initiatives in the inner world of the school in connection with the DÖK, and less to represent and represent the special student interests of the age group that is decision-making and least of all goes beyond the walls of the school. The decision-making role appears for students only in defining the operational framework in the context of DÖK organization (83%), but it shows less legitimacy in the case of decisions related to community life (58%). The same is indicated by the fact that only 45% of respondents consider expressing opinions on student disciplinary matters to be a dodgy task. A picture emerges before us as if students do not feel that the DÖK is so much their own, their own representation system, that in addition to assessing and representing opinions, they no longer give DÖK members a mandate to participate in decisions representing other decisions that cause serious waves (settlement level) and have personal consequences (disciplinary cases).

With the intention of getting to know deeper patterns, we ran our analyses in relation to independent variables, during which we found the following (Table 1).

Girls consider it more important that the DÖK should take a stand with the head of the institution on issues affecting students ($Z = -2.090$, sig. < 0.05), and that the DÖK should be the

initiator of active school community life (Asymp. Sig 0.01) and involves the school's pupils in local public actions of civil society ($Z = -2.524$, sig.<0.05). The boys consider it a more important task for the DÖK to participate and express its opinion in student disciplinary matters ($Z = -2.932$, sig.<0.05).

The initiation of active community life appears as a more important expectation among older students aged 18-19 ($Z = -1.952$, sig.<0.05). From the distributions by type of school, we could conclude that secondary school students consider it more important than the school principal to take a position on issues related to school life ($Z = -2.813$, sig.<0.05), that before making a resolution, the DÖK should collect the opinion of students ($Z = -2.169$, sig.<0.05), and that it should decide on its own operation ($Z = -3.655$, sig.<0.05), and support the initiatives of non-students ($Z = -2.604$, sig.<0.05) and to organise various activities in cooperation with other municipal student council ($Z = -2.353$, sig.<0.05).

With regard to the type of settlement of permanent residence, we found that young people living in cities, mostly in cities with county rights, consider it more important for the DÖK to seek the opinion of the school's students before making any position (Chi-Square = 18.418, sig.< 0.05), while the situation is the opposite for the DÖK to express an opinion on student disciplinary matters, young people living in cities with county rights consider it least important. (Chi-Square = 11.454, sig.< 0.05)

Opinions on individual tasks also showed significant differences in terms of interest in politics. Respondents who are interested in politics consider it more important than their apolitical peers that the DÖK should take a position with the principal on issues affecting students arising in the life of the school ($Z = -3.538$, sig.<0.05), that it should seek the opinion of the school's students before making resolutions ($Z = -2.670$, sig.<0.05), and that it should make decisions regarding its own operation ($Z = -2.091$, sig.<0.05) and to support initiatives of non-DÖK members ($Z = -3.215$, sig.<0.05).

With regard to parents' educational attainment, we found that the expectation of collecting preliminary opinions in case of a resolution increases in parallel with the increase in the educational attainment of fathers and mothers, in both cases the most important thing for the children of parents with a degree is that the DÖK should seek the opinion of the students of the school before making a resolution. (fathers Chi-Square = 12.958, sig.< 0.05, mothers Chi-Square = 11.565, sig.< 0.05).

We found no significant differences between DÖK officials and non-office holders in terms of internet frequency.

However, positive perceptions of personal future have caused rifts in three factors. Those who prefer not to be confident in their own future consider it more important to collect opinions before the resolution (Chi-Square = 8.382, sig.< 0.05), do not consider it a döö task to represent the school's students at municipal ceremonies (Chi-Square = 7.127, sig.< 0.05), and consider that it is not the task of the DÖK to involve the school's students in local civic initiatives (Chi-Square = 7.576, sig.< 0.05).

Students who are optimistic about the future of society consider it more important to publish statements on public affairs through the school's internal communication channels (Chi-Square = 8.743, sig.< 0.05), they also consider it more important for the DÖK to make decisions related to community life (Chi-Square = 8.531, sig.< 0.05), to take the initiative in the active

community life of the school (Chi-Square = 8.785.454, sig.< 0.05) and, to involve the school's pupils in municipal civil life (Chi-Square = 12.285, sig.< 0.05).

Students who report that they have had a negative experience with a violation of law consider it a significantly more important DÖK task to take a position on matters concerning students with the principal ($Z = -2.191$, sig.<0.05), to have the DÖK express its opinion in student disciplinary matters ($Z = -1.901$, sig.<0.05), and also to allow the school's students to participate in civil actions of municipal public interest through the DÖK ($Z = -3.120$, sig.<0.05).

Table 1
Tasks of the DÖK

	YES (%)
represent the interests of pupils in drawing up the school's rules of procedure	90
consult the pupils of the school before taking a position	89
take a position with the headmaster on matters concerning students in the life of the school	84
take decisions about its own activities	83
take a stand on school issues affecting students through the school's internal communication channels (school radio, Facebook group, etc.)	81
take the initiative to promote an active community life for school students	73
take up non-DÖK-member student initiatives in school life	72
organise joint actions with other school DÖKs in the municipality on issues of concern to young people	65
involve school pupils in the activities of local NGOs in the public interest (e.g. environmental protection, help for the elderly, other voluntary work, etc.)	61
take decisions concerning the students' community life	58
represent the school at municipal celebrations	49
together with other school DÖKs in the municipality, approach the mayor to represent the interests of local young people	45
give an opinion on disciplinary matters concerning students	45

REFLECTIONS ON CLASSICAL ADVOCACY TASKS AND NEW ROLES

In the next part of our research, we wanted to know what students think about the tasks of the DÖK. In a closed question, we examined the opinions of six statements, asking respondents to indicate on a five-point scale how much they think the DÖK is responsible for (Table 2). In addition to traditional advocacy roles ('hands-free' learners' voices, representation and handling of disputes), this set of questions also included some of the new phenomena emerging in the school world (Preventing violence in schools, Preventing bullying at school, combating discrimination, Countering disinformation and fake news). In our opinion, these are among the biggest challenges facing the school world, and we wanted to know how students feel about whether the DÖK, which represents the learning community, has a role in them. We found that, in addition to traditional student government roles, students think significantly less about the need for DÖK involvement in the case of new vulnerabilities that have appeared in the world of young people.

In the case of expressing students' opinions and representing and handling disputed issues, we can assume that for students representation means expressing opinions (this is the more passive) and less about "arguing" – including student-teacher or student-student conflict – and handling disputes as a decision-making role, and implementation. The latter is a more active role and goes beyond the former in that it assumes strong legitimacy as a basis for action in addition to representation (e.g. signaling opinion/problem) as a basis for action in relation to decision-making (case management and resolution). From the responses, it seems that this legitimacy is lacking.

Looking at the distributions of voters at the two extremes of the scale (totally vs. not at all), we can conclude that while two-thirds of the respondents believe that the representation and representation of student opinions is the main task of the DÖK, and another third believe that the DÖK should represent and handle the emerging disputes, in their opinion the new challenges affecting the world of schools are less of the task of the DÖK. The same number of respondents (18%-18%) consider combating disinformation and preventing violence in schools to be entirely the task of the DÖK, while 12% and 20% respectively believe that these are not at all wall data of the DÖK. Our data show that according to students, action against discrimination and action against violence in schools is even less of a task for the DÖK (in the case of both, 17% indicated that they do not consider it the task of the DÖK, respectively completely and 19%, respectively).

Table 2

Classic advocacy tasks and new roles

(How much is the task of the DÖK...?, average values on a five-point scale)

Making students' voices heard	4.5
Representation and handling of disputes	3.9
Fighting misinformation and fake news	3.2
Action against discrimination	3.1
Prevention of violence in schools	2.9
Preventing bullying at school	2.9

In our further analysis, we found that girls consider it more important to display students' opinions when taking on their DÖK tasks (4.7 for girls and 4.3 for boys on a five-point scale; $Z = -4.998$, $\text{sig.} < 0.05$), dispute representation (girls 4, boys 3.8 $Z = -2.153$, $\text{sig.} < 0.05$) and participation in bullying prevention (girls 3, boys 2.8 $Z = -1.946$, $\text{sig.} < 0.05$) than boys.

Looking for deeper patterns, we found no significant difference between age groups (16-17 years old and over 18 years old).

However, we were able to identify a significant difference in the opinions of students of vocational secondary schools, vocational secondary schools and general secondary schools in terms of expressing opinions and representing controversial issues in the same way. The average value of the answers given by vocational secondary school students is 4.2 in the case of the former, while it is 4.7 in the case of general secondary school students (the difference is significant ($Z = -5.537$, $\text{sig.} < 0.05$)). In the case of representation and handling of disputes, we could conclude the same (vocational secondary school, vocational secondary school 3.8, general secondary school 4, the difference ($Z = -2.027$, $\text{sig.} < 0.05$)). Compared to students of vocational secondary schools and vocational secondary schools, secondary school students consider it more important DÖK tasks both to present opinions and to represent and handle disputed issues.

No significant difference was found between the mean scores according to whether the respondent was a member of the school's student council or not. Thus, both students who are members of the student council and those who are not members of the student council believe that the most important functions of the student council are traditional representational functions and voice within the student council, but less so in combating disinformation and pseudo-news and discrimination, and least so in preventing violence and bullying in schools. This seems to be the students left to the adult world. This result raises the need for specific training for elected representatives and DÖK members. Based on the data, the same picture emerges for non-school (municipal, county, national) DÖK members (8 in the sample).

However, parents' educational attainment seems to have some influence on student perceptions. When it comes to displaying opinions, the opinions of children of fathers with higher education differ significantly (Chi-Square = 9.553, $\text{sig.} < 0.05$) from the other two groups (their children have an average score of 4.6, children with secondary education have an average score of 4.4, and children of fathers with primary education have an average score of 4), but the children of fathers with secondary education and fathers with a bachelor's degree do not differ. Children of fathers with degrees rated the display of opinions the highest (4.6) as a DÖK task. The situation regarding the "hands-free" of students' opinions regarding the educational attainment of mothers is the same as for fathers: children of mothers with tertiary education (4.6) differ significantly (Chi-Square = 8.704, $\text{sig.} < 0.05$) from both other groups, while children of mothers with secondary education (4.4) and bachelor's education (4.3) do not differ. In terms of tackling discrimination, children of mothers with primary education (average score: 4) differ significantly (Chi-Square = 8.615, $\text{sig.} < 0.05$) from the other two groups, but children of mothers with intermediate (average value: 3) and tertiary education (average value: 3) do not differ. Children of mothers with a degree rated the role of expression higher, while children of mothers with a bachelor's degree (15) rated action against discrimination. This result raises questions of personal involvement/experience and its consequences, as well as the development, training and preparation of learners' communities and representation to deal with and resolve such cases.

In terms of internet usage habits, we did not find significantly different patterns regarding DÖK's tasks. Students who use the Internet for 5 hours or more both during the week and on weekends undervalue the fight against fake news and the prevention of bullying at school just as much as those who use the Internet for less than 3-4 hours or less than 2 hours.

During our initial assumptions, we believed that trust in the future of the person and society shows different patterns in relation to the task of the DÖK. However, our data only partially confirmed this. Based on optimism/pessimism about the personal future, we did not find significant differences in the average values of each task. Opinions about the future of society, on the other hand, have shown an interesting correlation. In the case of active doc engagement (representation and management of disputes), we found a significant difference (Chi-Square = 8.932, sig.< 0.05) between respondents with an optimistic and less optimistic future outlook. Those who trust in the future of society consider representing and handling disputed issues to be a more important DÖK task (average value 4.3) than those who do not trust the future of society (3.7).

As indicated earlier, personal experience gained in some kind of infringement may shade the views on the accomplishment of tasks and roles of the DÖK. This dimension has revealed different patterns in three respects. Students who indicated that they had previous experience in some kind of violation³ rated three DÖK tasks more important than the others. In their case, the "hands-free" of students' opinions received an average score of 4.6 (compared to 4.4 for those who were not affected ($Z = -1.913$, sig.<0.06), prevention of violence in schools 3.1 (compared to 2.8 for those not affected; ($Z = -1.996$, sig.<0.05), and bullying prevention 3.2 (not affected: 2.8; ($Z = -2.294$, sig.<0.05). From all this, we can conclude that students who have suffered negative effects in connection with violations of rights expect the DÖK to play an active role in preventing violations when new youth vulnerabilities appear in the world of education. Therefore, this is not an extended role expectation, but a phenomenon present in the world of latency, which poses a new challenge for student communities and elected representatives (!) as well. Training with such knowledge (and how to deal with infringements) can be an important part of the training of DÖK members.

The legitimacy of the DÖK and its student background base are the foundations for the effective implementation of interpretive community (Pusztai 2011), representation and community development roles. Based on the above, a "vacuum" emerges in the DÖK's "room for manoeuvre" between the possible (and necessary to undertake, e.g. prevention of school conflicts, bullying, discrimination) and the roles realized, in other words: between the possibilities offered by the legal framework and everyday practice.

This may be related to the democratic deficit in schools, the devaluation of democratic values related to the microworld of the school (the organizational personality of the school), the disturbances of the culture of active and active citizenship, the lack of civic competences (the unrealized tasks of the socialization function of the family in public life and civic education in schools), but also to the shallowness of civic education (education), students' knowledge of rights and legal awareness shortcomings. This is indicated by the results of our research (Table 3), according to which 4% of students believe that students have the right to express their opinion at the express request of teachers or principals, and another 20% believe that students can express their opinion through the DÖK, in a suitable forum during the school year.

³ We did not examine the type of infringement, only the perception of involvement: in the distribution of yes/no variables.

Table 3
In what cases and when do you think students have the right to express their opinion at school?
(percentage distributions)

At the express request of the teachers or the headmaster.	4
Through the student council, in the appropriate forum during the school year.	20
About anything and at any time, as long as the opinion does not violate the human dignity of others.	76
	100

INTENTION TO PARTICIPATE

72% of students would participate in anonymous opinions (e.g. problem boxes), but only 54% would participate in expressing their opinion by assuming their name. Girls (78%) would participate more than boys (65%) ($Z = -2.281$, $\text{sig.} < 0.003$), but we found no difference between the sexes in terms of whether they also express their opinions with their names.

A quarter of students would participate in the leadership of the DÖK. Girls are also more motivated to participate in this issue (28% indicated that they would participate in the DÖK, compared to 24% among boys).

Overall, students' willingness to participate in taking on DÖK tasks can be assessed as low. (Table 4) The highest proportion indicated participation in the compilation of the policy, but this was also indicated only by 44% of respondents. This undermotivation means that the DÖK does not have a real supportive hinterland for exercising its initiative and proposal powers (only a half of students would participate in initiating active school community life and embracing non-dodgy student initiatives), but the same can be said about the power to form opinions and give opinions (42% of students would participate in collecting opinions, 38% would take a position on matters concerning students with the headmaster). One-fifth of students indicated that they would participate in expressing their opinion on disciplinary matters concerning students. The data show that only a minority of students would like to participate in making decisions that determine their own high school life and their school's microclimate. One third of respondents would participate in decisions related to the operation of the DÖK, and less than a quarter of respondents would participate in decisions related to the community life of students. Based on the data, we can see that as activity, personal energy investment increases, and from opinion-forming to representation (and possible conflicts) with face, word and deed, the motivation to participate decreases. We refer back to the results of the research, according to which students consider traditional advocacy and program and event organization to be the most important functions of the DÖK, and only a quarter of them would participate in the leadership of the DÖK, however, another 25% of students think that it is not possible to express their opinion at any time, but only in a limited way (at the express request of the headmaster, or during the school year in a suitable forum) – all this raises the question, Is the visible undermotivation in

terms of participatory activity due to the aforementioned democratic deficit, lack of information or lack of legal awareness? Either does it stem from the fact that students see the DÖK as a kind of “game of elites”, a cooperation between docs and institutional management, which arises in such a way that the election of DÖK representatives is not an election of representatives, but only a vote, when (see Arnstein 1969, Hart 1992) “smart representatives” are selected (e.g. as a result of nomination by the class teacher), or does it arise from missing patterns of exercising functions? e.g. in the institution DÖK is used only as decoration. With the further analysis of our research database, this will be the focus of our interest (for which our questionnaire provides a great opportunity), during which we will examine the patterns of satisfaction related to the role of the DÖK, as well as the opinions about making the work of the DÖK more effective, about the role set of the mentor teacher of the DÖK, and what content students expect from a training on student government.

However, it is worth saying here in advance that in response to the closed question “How do you think the work of the DÖK could be made more efficient?” three-quarters of students indicated (values of 4 and 5 in five-grade scale), and furthermore, 70% of respondents indicated that “If not only one designated person worked on this, the whole faculty would support his work” and 64% of students say “If students were given more freedom to manage their affairs”.

Table 4
Would you participate?
(percentages)

	YES
representing the interests of students in drawing up the school's rules of procedure?	44
gathering the views of students before taking a position?	42
taking a stand with the headmaster on issues affecting students in school life?	38
in initiating an active community life of students in the school?	34
supporting non-DGB student initiatives in the public life of the school?	33
publicising the school's position on public matters affecting students through the school's internal communication channels (school radio, FB group, etc.) ?	32
in making decisions about the functioning of the Student Council (DÖK)?	30
involvement of school pupils in local civic activities of public interest (e.g. environmental, helping the elderly, other voluntary work, etc.)?	30
organising joint actions with other DÖK in the municipality?	24
in making decisions about the students' community life?	23
to express an opinion on disciplinary matters concerning pupils?	20
represent the school at municipal celebrations?	18
visit the mayor together with the DÖK of another school in the settlement to represent the interests of the local youth?	15

CONCLUSION

As we wrote in the introduction, only a truly functioning student government can ensure that students can exercise their rights (directly or through representation). The legal operation of an educational institution can only be ensured by a well-functioning student government and the active participation of the school's citizens in community and student public life.

In the course of our research, we examined (1.) how students feel about the functions and tasks of the DÖK (they see the possible roles of student government in a narrower or broader framework), (2.) to what extent they consider the search for answers to the challenges and the solution of problems that appeared in the world of the school's students in the new millennium as role expectations of the DÖK, and (3.) what picture the students' responses draw in relation to the role of the student government as a "democracy school", and (4) the representation background and opportunities that motivations for participation create.

Girls, high school students, young people living in cities, those interested in politics and those affected by violations of rights are those who formulate broader role expectations in the case of student government. Children of fathers with degrees emphasize the formulation and representation of opinions, and the role of combating discrimination is emphasized by students whose mothers have a bachelor's degree. Those who have suffered negative effects in connection with a violation of rights expect the student government to play an active role in preventing violations when new youth vulnerabilities appear in the world of education. In terms of internet usage habits, we did not find significantly different patterns regarding DÖK's tasks, however, those who use the Internet more are less receptive to public participation in schools. Those who trust in the future of society consider representing and handling disputes, i.e. taking on conflicts, to be a more important task than those who do not trust.

We believe that preventing violence in schools, preventing bullying in schools, combating discrimination and combating disinformation and fake news are some of the biggest challenges facing the school world today. At the same time, we found that, in addition to traditional student government roles (gathering opinions, advocacy), students think significantly less about the need for DÖK involvement in the case of new vulnerabilities that have appeared in the world of young people.

The legitimacy of the student government and its student background base are the foundation for participation, the effective implementation of representation and community development roles. A "vacuum" emerges in the DÖK space between the roles that are possible (and necessary to be assumed by rights, e.g. prevention of school conflicts, bullying, discrimination) and the roles realized. According to the students' opinions, in everyday practice the tasks of DÖK are to collect/display opinions and organize events and programs. Motivation to participate in DÖK and active community participation characterizes only a small proportion of students. Representing opinions with face and deed, and accepting potential conflicts, shows even less inclination.

This may be related to the democratic deficit in schools, the devaluation of democratic values related to the microworld of the school (the organizational personality of the school), the disturbances of the culture of active and active citizenship, the lack of civic competences (the unrealized tasks of the socialization function of the family in public life and civic education in schools), and the shallowness of civic education (education), students' knowledge of rights and legal awareness also with its shortcomings. However, alienation among students from public roles

in schools may also indicate a lack of opportunities for involvement (e.g. student council used as decoration).

Nowadays, student government is one of the most important non-formal educational areas for the development of civic competences, where students' views are formed, their opinions are nuanced, and their knowledge can become skills and competences.

The basic conditions for individual and community activity and the active participation of young people are a positive supportive environment on the part of the adult world, a democratic organizational microclimate and a cooperative organizational personality. The development of active participation is a central tool for the social integration of young people.

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In the footsteps of Bourdieu towards digital capital

A case study on the application of the concept of digital capital on the relationship between digital and educational inequalities



ABSTRACT

Bourdieu's sociological concepts and approach are well suited to capture and interpret the new phenomena of the information society. The present paper shows how these concepts and notions have been applied in recent literature, both theoretically and empirically. We focus on the notion of digital capital, which is considered a new factor in the process of Bourdieu's cultural reproduction concept. Thus our starting point is that status in digital inequalities, and thus digital capital, plays a significant role in determining educational inequalities and school performance. We illustrate this hypothesis by analysing data of PISA 2015 from Hungary, namely the impact of different dimensions of ICT use on test scores in mathematics, reading literacy and science. Our results suggest that digital capital plays a crucial role in shaping educational inequalities, but that the effects vary across dimensions of digital inequalities and ICT use.

KEYWORDS

digital capital, digital inequalities, educational inequalities, school performance, PISA

DOI 10.14232/belv.2024.1.2

<https://doi.org/10.14232/belv.2024.1.2>

Cikkre való hivatkozás / How to cite this article:

Vincze, Anikó (2024): In the footsteps of Bourdieu towards digital capital. A case study on the application of the concept of digital capital on the relationship between digital and educational inequalities. *Belvedere Meridionale* vol. 36. no. 1. pp 24–42.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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1. INTRODUCTION

One of the most striking social transformations of recent years and decades has been induced by digitalisation, the transformation into an information society. Social scientists and sociologists have tried to grasp these structural changes, also with the concepts and ideas of Pierre Bourdieu, among others. In our study, we will show how digital sociology applies Bourdieu's concepts to these new phenomena, highlighting the concept of digital capital, which emerged in the late 2010s. The notion of digital capital is linked to the third level of research on the digital divide, which seeks to explore the effects of the use of digital devices on the position in the social structure. A case study is presented to link digital inequalities and educational inequalities along the lines of digital capital. We aim to answer whether digital capital is involved in shaping educational inequalities in the context of the information society.

2. THEORETICAL BACKGROUND

2.1 Digital inequalities

New digital technologies, including the internet, are spreading rapidly but unevenly. Whether examined at the global or societal level, new tools and technologies show an uneven distribution across continents, regions, countries and within a given society in relation to different social strata and groups (BOGNÁR – GALÁ CZ 2004). It is primarily because of this inequality-forming effect that the information society and related technological innovations have become an interesting and worthwhile topic for sociological research.

When new information and communication technologies (ICT) first emerged, there were two views on their impact on social inequalities. One approach, the *normalisation hypothesis*, argues that technologies reduce and, over time, eliminate social inequalities by giving everyone access to different kinds of information, knowledge and opportunities. The opposing view is sceptical about the egalitarian role of new technologies, the *amplification model* supposes that new technologies do not reduce but rather increase and deepen social inequalities and create a new dimension of inequality (PINTÉR 2007, DiMAGGIO et al. 2001). Although both approaches have a theoretical basis, empirical evidence supports the latter hypothesis, i.e. that ICTs are spreading unequally and create inequalities.

These inequalities can be examined at several levels. On the one hand, at the global level: between countries and regions, and on the other hand, within society, in terms of differences

between strata and groups (BOGNÁR – GALÁCZ 2004). In addition to global and social digital inequalities, NORRIS (2001) highlights a third dividing line, namely the democratic digital divide. By this she means that some members of society are able to use the Internet effectively for civic engagement and political activism, while others do not benefit from these opportunities and advantages.

The social studies of ICTs have taken three different approaches at the different levels of changing penetration rates. These are classified in the literature as three levels: *first-level digital divide*, *second-level digital divide* and *third-level digital divide* (VAN DEURSEN – HELSPER 2015, SCHEERDER – VAN DEURSEN – VAN DIJK 2017, RAGNEDDA 2018). Initially, access was at the forefront, as indicated by the first-level divide. At a higher penetration rate, the quality of use became a central issue, including quality of access, and hence the impact of broadband. Linked to the second-level divide is the unequal distribution of ICT skills and knowledge in society, with age being an important dimension. Some generations are „born into” the digital world, while others have been exposed to new technologies later in life and therefore have different ICT skills and knowledge. The third-level digital divide has come to the fore in social studies on ICT in the last few years. In the second half of the 2000s and the first half of the 2010s, numerous studies examined how dimensions of social inequalities determine differences in ICT use, but some authors have pointed out the need to move beyond this static approach and focus on the social consequences and impacts of ICT use (SCHEERDER – VAN DEURSEN – VAN DIJK 2017). Thus, since the second half of the 2010s, an increasing number of theoretical concepts and research have emerged that address and empirically investigate the social effects of Internet use based on the concept of the third-level digital divide (VAN DEURSEN – HELSPER 2015, RAGNEDDA 2018, LUTZ 2019, Gómez 2020). The crucial element of the theoretical framework of the third-level divide is the interpretation of ICT use as capital. Some authors consider the ability to use ICTs as a resource, as part of cultural capital, such as digital cultural capital (OLLIER-MALATERRE – JACOBS – ROTHBARD 2019). Others identify the acquisition of social benefits from ICT use and their interference with social status as a separate type of capital. In the literature, the concept of technological capital (CARLSON – ISAAC 2018) and the concept of digital capital (RAGNEDDA 2018) also appear. In our study, we relate to the concept of digital capital. In the next section we start by exploring the concept of capital in sociology, its origins and the ideas that have been developed about it.

2.2. The concept of digital capital

The concept of capital, which has its origins in economics, has also long been used in sociology, especially in various interpretations of social capital. The classical economic concept of capital can be traced back to Marx. In his approach, capital is property from which the owner is able to derive a surplus profit in relation to his expenditure. One form of this is money capital, from which, through investment, the individual generates more money. In another form, it is through the ownership and operation of the means of production that the individual realises, over and above his inputs, an additional return (FARKAS 2013). The post-World War II economic processes, the rapid pace of development and research that has been conducted to interpret them have led to the emergence of a new form of capital, namely human capital. T.W. Schultz identified

as drivers of rapid economic development, among others, the spread of literacy, the expansion of education and hence the advancement of knowledge and expertise, improved health, longer life expectancy and lower infant mortality. The concept and measurement of human capital was developed by Gary Becker, whose work established a new trend in economics (ROSSEN 1998). According to human capital theory, it is through individual investment in education, training and vocational training that individuals earn a higher return than their investment, since through this investment they increase their productive capacity and productivity and thus earn higher incomes in the labour market (VARGA 1998. 13).

In sociology, the concept of capital has become widely used through social capital. The concept of social capital has been interpreted in many different ways. Basically, two lines of research can be distinguished on the basis of a micro- versus macro-level division of the analysis (ORBÁN – SZÁNTÓ 2005). One line of research starts from the individual and focuses on the benefits of social capital for the individual. In other words, how the individual can access and mobilise resources embedded in networks of relationships to achieve his or her own goals. The other set of theories approaches the utility of social capital from the perspective of the community. According to these theories, social capital contributes to the achievement of certain collective goals.

The best known theories of social capital in sociology are those of Pierre Bourdieu and James Coleman. Pierre Bourdieu extended the concept of capital in economics, which he considered to be an important basis for the place of capital in the social structure (ANHEIER – GERHARDS – ROMO 1998). He distinguished three basic types of capital: economic, cultural and social. These types of capital are interchangeable and can be converted into other types of capital (BOURDIEU 2004 [1983]). There is a fourth type of capital, symbolic capital, but its contours remain rather vague (FARKAS 2013). Economic capital is made up of resources that can be expressed in money or can be monetised. It includes monetary income itself, financial resources and assets. Bourdieu argues that the concept of human capital in economics is reduced to the monetary expression of investment in education and learning, thus ignoring important dimensions that are encompassed by the concept of cultural capital as he defines it. „[...] theorists of human capital condemn themselves to ignoring the most hidden and socially most effective investment in education, namely the transmission of cultural capital in the family.” (BOURDIEU 2004. 125). Cultural capital exists in different forms, of which Bourdieu distinguishes three types. Incorporated cultural capital is acquired during socialisation, primarily in the family. It includes the individual abilities, skills, talents and knowledge that are internalised and built into our personality. It takes a longer period of time to transfer, as it is a process of nurturing. This form of cultural capital is not validated by the institutions of society. The second form, institutionalised cultural capital, is created through the recognition and validation of the relevant social institutions, primarily through educational degrees and certificates. In fact, it is nothing other than a form of incorporated capital manifested in various certificates. In addition to incorporated cultural capital, it also requires economic capital. The third type is objectified cultural capital, which can be more directly linked to economic capital, since it includes the objectified forms of cultural capital. This form therefore refers to objects that have cultural value. The reception and enjoyment of this objectified form presupposes incorporated cultural capital (BOURDIEU 2004).

In Bourdieu's interpretation, the third type of capital that affects the position in the social structure is social capital. He defines it as „the set of actual and potential resources associated with the possession of a durable network of more or less institutionalised relations of mutual

acquaintance or recognition.” (BOURDIEU 2004. 130). This resource is thus based on belonging to a group, it is the resources available through relationships, social ties. The extent of social capital depends on the extent of the network of relationships, the capital of the individuals in the network of relationships and the extent to which they make these resources available (BOURDIEU 2004). For Bourdieu, too, the individual character of social capital is dominant, i.e. it is primarily of use to the individual. Connections based on reciprocity and mutuality can be effectively mobilised by the individual to fill important positions or to build a career (ORBÁN – SZÁNTÓ 2006).

The other major theorist of social capital is James Coleman, who first applied the concept to the social context of education, before extending it in a broader sense (ORBÁN – SZÁNTÓ 2006). His approach is also micro-level, and he understood social capital as the use of an individual’s network of relationships as a resource. In his conceptualisation, social capital *„is, unlike other forms of capital, embodied in the structure of relations between actors.”* (COLEMAN 2006. 112). The social network of relationships serves primarily as a resource for the individual, enabling him or her to achieve certain goals. At the same time, it also has the character of social capital as a public good. The benefits of certain types of social capital are not enjoyed exclusively by those who create it, but also by others, so that individuals invest less than necessary in the creation of social capital (COLEMAN 2006. [1988]).

Putnam, on the other hand, stresses the communal character of social capital and its collective utility. Social capital, as a social organisation, is characterised by networks of relationships, norms and social trust that promote mutually beneficial coordination and cooperation. In communities where social capital is strong, norms of reciprocity and mutual trust are common, which facilitate coordination and communication (PUTNAM 2006. [1995]).

In recent years, a new concept of capital has emerged within sociology, building on earlier theories of social capital and developing them further to create the concept of digital capital. It is primarily Bourdieu’s theoretical notions that are the starting point for a new line of sociology, digital sociology, which attempts to understand the social aspects of ICT use and digital phenomena and their effects on social structures. Digital sociology can be both the study of social effects of ICTs and the application of digital technologies in the research methodology of social sciences (IGNATOW – ROBINSON 2017). In the following, we will show which concepts of Bourdieu and how they can be applied to the study of ICT-related phenomena.

The extension of the field (*champ*) concept to digital culture seems obvious. In Bourdieu’s interpretation, the field is a particular organised segment of social space, constituted by the social distance between members of society, by the system of valid inequalities. Inequalities are organised along the lines of different resources and capitals. The main element of the field is the competition between people for the acquisition and retention of resources and stakes accepted in the field (BOURDIEU 2010 [1994]). The online space can also be understood as a field organised along digital inequalities, with digital capital as the dominant resource (IGNATOW – ROBINSON 2017). Another important element of Bourdieu’s theoretical foundations is habitus, which mediates between the field and practical action. Habitus is in fact a mental and symbolic imprint of the social situation that generates practical action. Its manifestation is a system of enduring attitudes and dispositions built into the personality. One of the best examples of the empirical analysis of habitus is Bourdieu’s *La Distinction*, in which he examines inequalities between social classes through differences in tastes (Bourdieu 1984 [1979]). The concept of habitus has

also gained ground in digital sociology and many have attempted to measure it. One form of this is the linguistic analysis of digital content, including sentiment analysis (IGNATOW – ROBINSON 2017). JULIEN (2015) has explored the applicability of Bourdieu's concepts to online activities and interactions through internet memes. The so-called „event meme” is interpreted as the phenomenon that is an expression of digital habitus¹.

Bourdieu's concept of digital space and its interactions is of particular importance in the interpretation of the central element of the online field, the foundation of digital habitus, digital capital itself. The concept of digital capital is related to different levels of digital divides. As described earlier, the study of the digital divide initially focused on dichotomous inequalities in ICT access and use (first level digital divide), and then shifted to inequalities among users in use, which were called digital inequalities (second level digital divide).

In recent years, a new approach to the digital divide has emerged, namely the analysis of the third level digital divide. This is based on the recognition that since different usage patterns are closely related to the social status of the individual, groups with a more favourable social status can benefit more from ICT use than those with a less favourable status. Using empirical data, VAN DEURSEN and VAN DIJK (2014) showed a correlation in Dutch society where people with lower educational attainment spend more time using the internet, but are not able to use it as a resource. However, more educated users can also gain additional social benefits from less internet use. An analysis based on the concept of third level digital divide has been carried out by Deursen and HELSPER (2015), in which the use of the internet and its benefits in different areas of an individual's life (e.g. material, relational, educational, political) were measured and compared with traditional social inequalities. Their analysis showed that education is the most determinant factor in the use of the internet as a resource.

This approach thus links digital inequalities to social structure by trying to capture the offline effects of ICT use and online activities, their inequalities mediated in social reality (RAGNEDDA 2018). This is where the concept of digital capital becomes central, providing a theoretical foundation for empirical studies that has been lacking so far. Building on Bourdieu's concept of capital, RAGNEDDA (2018) defines digital capital as the accumulation of digital competences and digital technologies. Like other types of capital, it has the important characteristic of being fungible. Digital capital is therefore directly or indirectly convertible into any other capital, whether economic, social, cultural, human or political. In fact, digital capital bridges the gap between online and offline life opportunities, creating an interaction between them. An individual's existing capital (economic, social, cultural, human and political) influences the extent to which digital capital feeds back and converts into offline capital, which influences the individual's social position. Thus, by this mechanism, those who already have favourable capital can use it more effectively to increase their digital capital, thereby further enhancing their original capital. The same mechanism can also work in reverse, so that lower offline capitals result in lower digital capital, which in turn reinforces and re-produces the individual's unfavourable social position. The other two intermediate ideal cases are high levels of offline capital but low levels of digital capital, or conversely, low levels of offline capital but high levels of digital capital. An example of the first combination is the ageing professor who has high levels of economic, cultural, social

¹ The „event meme” interprets a current world event by combining an existing meme with the specific language of the internet (an expression of habitus itself) (JULIEN 2015).

and human capital but lacks digital competences and capabilities, and therefore has low digital capital. In this case, he cannot effectively increase his original capital with his digital capital. The other variation is exemplified by the clever, ingenious criminal who has low economic, cultural, social and human capital, but whose digital competences are outstanding, so that he can effectively use his digital capital to increase his original capital, e.g. economic capital, for example, through cybercrime. In his study, Ragnedda explains the interaction of digital capital with different types of offline capital. Of these, the interaction between cultural capital and digital capital is the most relevant for the present thesis. Cultural capital includes skills, education and knowledge that an individual can use for the benefit of other capital, including digital capital. The consequences of this interaction are then drawn for both online and offline life. What are the possible manifestations of the interaction between these two types of capital? The positive interaction in second level digital inequalities results in a level of tertiary digital divide where individuals are able to use the information they acquire online as value, to verify the credibility and reliability of information/resources, to deepen and process online information. The negative interaction results in the opposite of all this (RAGNEDDA 2018).

GÓMEZ's (2020) empirical study is based on the theoretical foundations of digital capital, as outlined in Bourdieu's theses. Using a qualitative method and in-depth interviews, they sought to explore and analyse the mechanisms by which the three main types of capital, economic, cultural and social capital, are transformed into digital capital among young people in Madrid, and then converted back into the original capital. The modes of conversion-reconversion provide a picture of how digital inequalities re-produce and deepen social inequalities. The analysis distinguishes between objectified and incorporated digital capital, based on Bourdieu's notions of cultural capital. Incorporated digital capital is internalised through habitus, which is determined by digital skills, dispositions, motivations, interests, expectations and digital practices shaped by past experiences. Objectified digital capital is defined in terms of digital equipment, ICT tools used and technological infrastructure. There is a circular link between the types of original (offline) capital and digital capital. The conversion of original capital is first achieved with objectified digital capital through the customisation of technological equipment. The conversion of objectified capital into incorporated digital capital is achieved through digital literacy, and finally, incorporated digital capital is converted back into economic, cultural or social capital through offline effects from different ICT uses. Based on the results of the interview research, the author confirmed the role of digital capital as „bridging capital”, i.e. as a mediator between different types of capital and between online and offline spaces. At the same time, it was concluded that digital capital should not be seen as a completely new type of capital, but as a sub-type of cultural capital, since digital technology cannot be separated from the cultural context of society (GÓMEZ 2020).

The study of RAGNEDDA, RUIU and ADDEO (2020), which conceptualises and operationalises digital capital and then constructs a so-called digital capital index, aims to provide a basis for a comparative empirical study of digital capital. It is based on two pillars, digital access and digital competence, which are built on several dimensions. The dimension of digital access, which is part of the index, covers almost the same areas as the DiMaggio – Hargittai model of digital inequality, with one or two differences. The Digital Capital Index can provide a starting point for identifying and intervening to reduce digital inequalities.

3. RESEARCH QUESTIONS

Empirical research based on the conceptual framework of digital capital has started to appear in the last few years. Most of the empirical work on ICT use and its social impact to date lacks this kind of theoretical embeddedness. In this paper, by presenting a case study we apply the concept of digital capital in the context of cultural re-production, thus to the relationship between digital inequalities and school performance. We seek to answer how different dimensions of digital inequalities affect school performance. Which ICT usage patterns can be considered as digital capital that can be converted into school performance? In this way, we can gain an insight into whether ICT use as digital capital can be considered a resource which, alongside economic and cultural capital, has an influential power on school performance and the status in the system of educational inequalities.

4. METHODOLOGY

To examine the correlations, we used data from PISA 2015 in Hungary, which simultaneously provide information on students' ICT use and their performance at school. School performance is measured by test scores in three fields – mathematics, reading literacy and science – in the PISA surveys². In our analysis, these test scores³ were the dependent variables. Descriptive statistics for the dependent variables are presented in the table below (Table 1).

*1. Table 1: Descriptive statistics for the dependent variables. Source: PISA 2015.
Edited by the author.*

	N	Minimum	Maximum	Mean	Variance
Mathematics performance	5658	185,9	782,7	476,6	93,7
Reading performance	5658	163,5	754,6	468,9	97,5
Science performance	5658	156,8	763,8	477,0	95,9

The linear regression models include as independent variables different dimensions of ICT use, which we have classified as DiMAGGIO – HARGITAI (2001) dimensions of digital inequality. These are (1) technical equipment, (2) autonomy of use, (3) skills and knowledge, (4) social support and (5) purpose of use. For each dimension we adapted related variables from the PISA database. The dimension of technical equipment is examined through

² For more on the PISA methodology, see OECD 2017

³ Students' school performance is given in test scores in the PISA database. It should be noted, however, that these scores are not concrete test scores, but so-called plausible values. This is because, in order to maximise the accuracy of the measurement and to limit the time frame, students taking the PISA assessment do not complete the same test booklets. Therefore, plausible values for each student's performance are entered in the PISA database and calculated using modern Item Response Theory (IRT), including the Rasch model (for more details see OECD 2017. 141).

the availability and use of ICT devices at home. Autonomy of use is captured through the duration of Internet use. After all, the amount of time a student spends online outside school each day is to some extent a reflection of the degree of freedom or restriction of access to and use of the Internet. There are two ways of approaching students' ICT skills, based on the PISA questions. A distinction can be made between general knowledge and knowledge that enables autonomous use. Subjective ICT knowledge and competence is summarised in two indices in the PISA database. One index (COMPICT) represents a general user knowledge, the other index (AUTICT) refers to a more in-depth, autonomous user ability. Social support for ICT use was assessed using the index available in the PISA database (SOIAICT), which captures the extent to which ICT use is embedded in students' peer interactions and communication. Finally, we mapped the purpose of Internet use and the ways of using the Internet among Hungarian 15-year-old students. On the one hand, we analysed general Internet use activities at home and the ways of using the Internet to support learning, schoolwork and progress with studies. To investigate the association of Internet use patterns with school performance, we used principal components⁴. By applying principal components for general ICT use, we were able to distinguish three types of use, namely (1) use for communication and entertainment, (2) use for gaming, and (3) use for orientation and information retrieval. In the case of Internet use for learning and study, we were able to distinguish two main components. The first principal component („Principal_Comp_Learning”) includes activities that more closely relate to the use of ICT tools for learning, such as using the Internet to gather information for schoolwork or to understand course material, and communicating with fellow students about schoolwork on the social networking site⁵. The second principal component („Principal_Comp_SCHOOL_ELSE”) includes all the other activities from this set of variables, from downloading apps to help learning, to using ICT to do homework or checking the school's website. These ICT uses have been grouped together as other school-related activities that support the pursuit of studies, i.e. not closely related to learning. A detailed description of the independent variables is summarised in the table below (Table 2).

Table 2: Presentation of independent variables along the digital inequality dimensions.

Edited by the author.

The digital inequality dimension	Adapted ICT use dimension	Original variables
1. Technical equipment	Availability and use of ICT tools in the home	<p>Are any of these devices available for you to use at home? <i>(Yes, and I use it, Yes, but I don't use it, No)</i></p> <ul style="list-style-type: none"> – Internet connection – Desktop computer – Portable laptop or notebook – Tablet computer – Mobile phone with internet access

⁴ For more on the methodological background and the construction of the principal components, see VINCZE (2021).

⁵ This activity, which is quite common among young people, may be more closely linked to learning because social media channels are used to discuss schoolwork, and to help each other understand tasks or material. In fact, it can be likened to a kind of study group, which directly supports learning and processing of the curriculum

2. Autonomy of use	Time of Internet usage	<p>During a typical weekday/ weekend day, for how long do you use the Internet at home?</p> <ul style="list-style-type: none"> – No time – 1-30 minutes per day – 31-60 minutes per day – 1-2 hours per day – 2-4 hours per day – 4-6 hours per day – More than 6 hours a day
3. Skills, knowledge	Subjective ICT skills: General (COMPICT)	<p>Thinking about your experience with digital media and digital devices: to what extent do you disagree or agree with the following statements? (<i>Strongly Disagree, Disagree, Agree, Strongly Agree</i>)</p> <ul style="list-style-type: none"> – I'm also good with digital tools that I'm less familiar with – If a friend or relative wants to buy a new digital device or app, I can advise them. – I'm good with digital devices at home. – When I have a problem with a digital device, I think I can solve it. – If a friend or relative has a problem with a digital device, I can help them.
	Subjective ICT skills: autonomous use (AUTICT)	<p>Thinking about your experience with digital media and digital devices: to what extent do you disagree or agree with the following statements? (<i>I strongly disagree, I disagree, I agree, I totally agree</i>)</p> <ul style="list-style-type: none"> – If I need a new computer program, I install it myself. – I read about digital tools to be independent. – I use digital tools the way I want. – When I have a problem with a digital device, I try to solve it myself first. – When I need a new app, I choose it myself.
4. Social support	Embedding ICT use in social interactions and communication (SOIAICT)	<p>Thinking about your experience with digital media and digital devices: to what extent do you disagree or agree with the following statements? (<i>I strongly disagree, I disagree, I agree, I totally agree</i>)</p> <ul style="list-style-type: none"> – To learn about digital devices, I like to talk about them with my friends. – I like to exchange experiences with others on the internet about problems with digital devices – I like to share information about digital devices with my friends. – I like to meet my friends and play computer games and video games with them – I learn a lot about digital media from talking to my friends and relatives

5. Purpose of use	General use	<p>How often do you use digital devices for the following activities outside of school? <i>Never or almost never, Once or twice a month, Once or twice a week, Almost every day, Every day)</i></p> <ul style="list-style-type: none"> – Using e-mail – Playing collaborative online games. – Playing one-player games – Chatting online (e.g. MSN) – Participating in social networks (e.g. Facebook, MySpace, etc.) – Playing online games via on social networks – Browsing the internet for fun (such as watching videos on YouTube) – Reading news on the internet (e.g. current affairs). – Obtaining practical information from the internet. – Download music, films, games or software from the internet. – Upload your own created contents for sharing. – Download new apps on a mobile device.
	Use for learning purposes	<p>How often do you use digital devices outside school for the following activities? <i>Never or almost never, Once or twice a month, Once or twice a week, Almost every day, Every day)</i></p> <ul style="list-style-type: none"> – Browsing the internet for schoolwork – Use e-mail to communicate with other students about school work. – Use e-mail to communicate with teachers, to hand in homework or other school assignments. – Use social networking sites to communicate with other students about school work. – Use social networking sites to communicate with teachers about school work. – Download, upload or browse data (e.g. timetables or lesson materials) on your school's website. – Reading notices on the school website, e.g. about teacher absences. – Doing homework on the computer. – Doing homework with a mobile device. – Download learning apps for your mobile device. – Download knowledge learning apps for your mobile device.

As control variables, the socio-economic-cultural background variable, the ESCS index⁶ and the student gender variable were included in the analysis. In Hungary, the mean of the ESCS index is -0.177, i.e. lower than the OECD average, with a standard deviation of 0.94, which is very close to the standard deviation of OECD countries (Table 3).

⁶ This index is composed of three components: (1) the highest educational attainment of parents, (2) the employment status of parents, and (3) the cultural goods (number of books) and other educational resources available at home. The ESCS index is a standardised index designed to have a mean of 0 and a standard deviation of 1 for OECD countries (OECD 2017. 339–341).

Table 3: Descriptive statistics of the ESCS index in the Hungarian subsample. Source: Pisa 2015. Edited by the author.

	N	Minimum	Maximum	Mean	Variance
ESCS index	5570	-6,79	3,01	-0,177	0,94

Previous research by VINCZE (2021) comparing the digital inequality dimensions described above separately in linear regression models with school performance for all three literacy categories, controlling for social background and gender, has shown that they mostly positively affect school performance. In this case study, we show how ICT use across the digital inequality dimensions jointly affect mathematics, reading literacy and science outcomes. Which dimensions are more important in determining performance and which are less important? This will give us an idea of which ICT uses act as resources and which can be considered as digital capital.

To answer these questions, the variables used to examine digital inequalities are included in a joint regression model. Our dependent variables remain the (estimated) test scores in mathematics, reading and science. The explanatory variables are the variables representing the digital inequality dimensions, gender and the ESCS index. The models were constructed separately for mathematics, reading and science performance using the stepwise method to include the variables.

5. ANALYSIS

In the joint linear regression model for mathematical performance (Table 4), two variables were not included as their regression coefficients were not significant, namely PC device usage and use for gaming⁷. The explanatory variables are not subject to multicollinearity, as values of variance inflation factor (VIF) of the variables included in the model are generally below 2⁸. The variables included in the model together explain 31.6% of the mathematics performance⁹. The regression model is significant¹⁰. Based on the beta coefficients, we can infer which explanatory variables have the largest effect on the dependent variable. Unsurprisingly, the ESCS index of social background is the most significant determinant of performance, in a positive way (beta=0.386). Students with a more favourable social background therefore score higher on the test. Among all the ICT variables included, 'other school-related use' was found to be the most significant factor (beta=-0.209), but the correlation was negative. Thus, those who frequently use the Internet for school-related purposes perform worse on the test. There is therefore a negative relationship between school-related internet use and academic performance. Based on the absolute value of the beta coefficient, the next most important determinant is the embeddedness of ICT in social communication (SOIAICT). This variable also has a negative effect on mathematics performance (beta=-0.155). Among ICT variables with a positive effect, the time factor, the time spent using ICT between 1 and 4 hours per week, is the most important (beta=0.119). In the joint model, the use for getting information follows with a beta value (0.099)

⁷ Use of PC devices t=0.716 p=0.474. Principal Comp_Game t=0.509 p=0.611.

⁸ A VIF index above 5 indicates strong multicollinearity (Kovács 2008: 48).

⁹ The adjusted R² for the regression model without gender and ESCS variables, i.e. with only variables adapted to the digital inequality dimensions, is 0.172.

¹⁰ Based on ANOVA test F=67,718 p=0,000.

as the ICT factor with a positive influence, ahead of the skill variables, the type of device used and other use modes. Learning mode of use, mobile device use and general subjective ICT skills are the least influential factors on mathematics performance.

*Table 4: The joint effect of digital inequality dimensions¹¹ on mathematics performance.
Source: PISA 2015, edited by the author.*

	Unstandardised coefficients		Standardised coefficients			Collinearity statistics	
	B	Std. error of the estimate	Beta	t	Sig.	Tolerance	VIF
Constant	456,715	7,89		57,887	0		
ESCS	37,022	1,328	0,386	27,872	0	0,927	1,078
Principal_Comp_SCHOOL_ELSE	-18,912	1,31	-0,209	-14,434	0	0,844	1,185
Moderate Internet usage time (1-4 hours) ^a	21,253	2,413	0,119	8,809	0	0,978	1,023
AUTICT	8,826	1,764	0,095	5,005	0	0,488	2,048
SOIAICT	-13,59	1,483	-0,155	-9,165	0	0,625	1,6
Principal_Comp_Gathering information	8,799	1,307	0,099	6,731	0	0,823	1,215
GENDER ^a	19,024	2,693	0,106	7,063	0	0,785	1,274
Principal_Comp_Communication_Entertainment	7,879	1,398	0,085	5,635	0	0,777	1,287
Internet usage ^a	37,05	7,555	0,07	4,904	0	0,88	1,137
Use of mobile devices ^a	-16,92	4,822	-0,05	-3,509	0	0,885	1,13
COMPICT	3,452	1,638	0,037	2,107	0,035	0,561	1,782
Principal_Comp_LEARNING	-2,778	1,325	-0,031	-2,097	0,036	0,807	1,239

*Dependent variable: mathematics score
Note: adjusted R² = 0.316.^a dummy variable*

¹¹ AUTICT= Perceived autonomy related to ICT use, SOIAICT= ICT as a topic in social interaction, COMPICT= perceived general ICT competence

In the evolution of reading literacy test scores, variables representing the digital inequality dimensions and socio-demographic variables together explain 36.1% (Table 5), almost 5 percentage points more than the variables from mathematics performance¹². Three variables were excluded from this model due to the non-significance of the regression coefficients, namely PC device use, mobile device use and use for gaming¹³. The final regression model is significant¹⁴. The reading literacy score is also most positively determined by the social background index (beta=0.372). The standardised regression coefficients for the ICT variables show similar relationships as for mathematics achievement. The value of the beta coefficient is also highest for school-related use and the direction is similarly negative (beta= -0.279). The variable adapted to the social support dimension also has a negative effect on reading literacy scores. Positive and relatively more significant effects are found for „use for getting information” (beta=0.114) and moderate Internet usages time (beta=0.104). The least significant factors are use for learning (beta=-0.056), internet usage (beta=0.058) and communication-entertainment usage (beta=0.067).

*Table 5: The joint effect of digital inequality dimensions on reading performance.
Source: PISA 2015, own ed.*

	Unstandardised coefficients		Standardised coefficients			Collinearity statistics	
	B	Std. error of the est.	Beta	t	Sig.	Tolerance	VIF
Constant	460,747	7,382		62,418	0		
ESCS	36,82	1,322	0,372	27,848	0	0,928	1,078
Principal_Comp_SCHOOL_ELSE	-25,913	1,303	-0,279	-19,885	0	0,846	1,182
GENDER ^a	-20,199	2,68	-0,11	-7,537	0	0,786	1,273
Moderate Internet usage time (1-4 hours) ^a	19,102	2,402	0,104	7,954	0	0,978	1,022
Principal_Comp_Gathering information	10,465	1,301	0,114	8,046	0	0,824	1,213
COMPICT	7,208	1,628	0,076	4,426	0	0,563	1,776
SOIAICT	-13,945	1,476	-0,154	-9,445	0	0,625	1,6

¹² Including only ICT variables in the model results in an explained variance of 23%.

¹³ PC type device use t=0.595 p=0.552. Mobile device use t=-0.504 p=0.615. MAIN_COMP_GAME t=-1.121 p=0.262.

¹⁴ Based on ANOVA test F=105.609 p=0.000.

AUTICT	8,189	1,755	0,086	4,665	0	0,488	2,047
Internet usage ^a	31,932	7,284	0,058	4,384	0	0,938	1,066
Principal_Comp_ Communication_En- ertainment	6,347	1,382	0,067	4,592	0	0,788	1,269
Principal_Comp_ LEARNING	-5,188	1,318	-0,056	-3,935	0	0,808	1,238

Dependent variable: reading literacy score

Note: Adjusted R² = 0.361.^a dummy variable

The joint effect of ICT variables adapted to the digital inequality dimensions shows a similar pattern for science performance (Table 6). The explained variance of the model is 32.3%¹⁵. The variables omitted from the model are again PC device use and use for gaming¹⁶. The resulting model is significant¹⁷. There is one difference in the order of the beta coefficients for the strength of the effects compared to the other two competency areas. Among the ICT variables with a positive effect, the index of skills for autonomous use (AUTICT) proves to be the most significant (beta = 0.118), ahead of the variables representing the mode of use to obtain information and the time of use. Presumably, the ability to use ICT autonomously embodies a competence that is better exploited in the field of science.

Table 6: The joint impact of digital inequality dimensions on science performance.

Source: PISA 2015, own ed.

	Unstandardised coefficients		Standardised coefficients			Collinearity statistics	
	B	Std. error of the est.	Beta	t	Sig.	Tolerance	VIF
Constant	462,187	7,951		58,128	0		
ESCS	36,006	1,339	0,371	26,897	0	0,927	1,078
Principal_Comp_ SCHOOL_ELSE	-24,221	1,32	-0,265	-18,343	0	0,844	1,185
AUTICT	11,003	1,777	0,118	6,191	0	0,488	2,048

¹⁵ Including only ICT variables in the model results in an explained variance of 19.5%

¹⁶ Use of PC devices t=0.6 p=0.548. Principal_Comp_use for gaming t=-1.784 p=0.074.

¹⁷ Based on ANOVA test F=153,816 p=0,000.

SOIAICT	-13,947	1,494	-0,157	-9,333	0	0,625	1,6
Moderate Internet usage time (1-4 hours) ^a	17,273	2,431	0,095	7,104	0	0,978	1,023
Principal_Comp_Gathering information	8,674	1,317	0,096	6,584	0	0,823	1,215
Internet usage ^a	34,263	7,614	0,064	4,5	0	0,88	1,137
Principal_comp_Communication_Entertainment	6,803	1,409	0,073	4,827	0	0,777	1,287
Principal_comp_LEARNING	-5,103	1,335	-0,056	-3,823	0	0,807	1,239
GENDER ^a	9,843	2,714	0,054	3,626	0	0,785	1,274
COMPICCT	4,8	1,651	0,051	2,908	0,004	0,561	1,782

Dependent variable: science score

Note: Adjusted R² = 0.323.^a dummy variable

The joint linear regression models suggest that ICT use characteristics by digital inequality dimensions have a determinant effect on school performance. Models including only ICT variables, before including socio-demographic explanatory variables, explain almost 20% of the variance in scores - 23% for reading performance. The magnitude of the effects of the variables in relation to each other revealed that, apart from social background, the most important determinant of performance in all three competency areas, apart from school-related frequent internet use, is the use of the internet. However, this effect is negative, i.e. the more often a student uses the internet related to schoolwork, the lower the score on the tests. Similarly, internet use more closely related to learning has a negative impact on school performance, albeit to a lesser extent. This relationship has already been observed in the individual analysis of the digital inequality dimensions (VINCZE 2021). However, the joint model also shows that the dimension 'other school-related use' has a larger effect on maths, reading literacy and science scores than subjective ICT skills and other uses.

What might be behind this correlation? On the one hand, we can assume that there is a reverse causality, i.e. that lower-achieving students turn to the internet more often to supplement their learning and studies. Moreover, frequent use of school-related activities does not necessarily imply their effectiveness, e.g. frequent downloading of mobile applications for learning. At the same time, it can be speculated that there are other factors behind the frequency of these activities, such as the integration of the use of ICT into the teaching methods. In this case, the negative relationship may be due to an over-emphasis by teachers on the use of ICT devices, for example for homework, and thus the emphasis on 'form' over 'content'. This may be suggested by the PISA report on the correlation between computer use, which draws attention to the negative impact of

too frequent use of ICT in schools and in classrooms on school performance (OECD 2015. 153). This possible correlation requires further exploration and investigation, which is beyond the scope of this paper, but may be an interesting avenue for further research.

Also, the correlation that frequent communication with friends about ICT devices (SOIAICT) has a relatively significant negative effect on performance in all three competency areas in the multivariate regression models needs to be explained. It is hypothesized that the frequent topic of ICT devices in social communication and interaction may represent a latent factor of the importance and centrality of ICT devices to the individual. In this way, there may also be an emphasis on 'form' over 'content' in the individual's life, i.e. ICT devices as objects of use, as opposed to their effective use. This assumption also needs further research.

School performance is positively influenced to a relatively greater extent by information use mode, moderate Internet usage time and higher levels of skills for autonomous use in multivariate regression models. Thus, these dimensions seem to be the most important contributors to resource-increasing use, and are involved in increasing digital capital.

6. SUMMARY

The aim of our study was twofold: on the one hand, we tried to present the possibilities of applying Bourdieu's concepts and their manifestations in the international literature in the context of the information society. Bourdieu's notion of the *field* is well applicable to the digital space, where the defining inequalities are *digital inequalities* and where the stakes are the acquisition or enhancement of *digital capital*. On the other hand, following Bourdieu, we have sought to interpret the role of digital capital as a factor influencing school performance alongside traditional capital. To illustrate this, we have used a case study to show the impact of ICT usage patterns, which we have mapped to the digital inequality dimensions, on school performance. The results of the analysis showed that some ICT use modes – information use mode, moderate Internet usage time and higher levels of subjective skills for autonomous use – contribute to increasing school performance, while others – 'other school-related use mode', learning use mode and the embeddedness of ICT use in peer communication and interaction – tend to decrease it. The former thus contribute to increasing digital capital, while the latter contribute to reducing it.

The role of digital capital in cultural reproduction is beyond the scope of this study, but it could be an important avenue for further research. VINCZE'S (2021) previous research suggests that family background is a key determinant of ICT use patterns and dimensions of digital inequality. Thus, it can be assumed that digital capital also plays a role in the process of cultural reproduction. In other words, it is not enough to acquire the appropriate cultural capital in the family to achieve cultural reproduction, but it is also necessary to acquire the appropriate level of digital capital, which is also strongly influenced by family background. Of course, this hypothesis requires further investigation, extending the analysis in space and time, but it could be an interesting starting point for applying Bourdieu's concepts and notions in a new context.

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Professional networking in the field of social sciences¹



ABSTRACT

Professional networking is of paramount importance for academic researchers in terms of their professional development and career advancement. In the national and international literature, research on network building typically takes a quantitative approach, while research using qualitative methods on network building is less common among researchers. Furthermore, gender differences in the field of networking tend to be more typically studied in male-dominated STEM fields (science, technology, mathematics and engineering). In our research, we conducted twenty-five semi-structured interviews with researchers who obtained a doctoral degree in the social sciences in Hungary, asking them about the importance of network building in their profession and career development, whether they have been trained for networking, and how consciously they build their professional networks. Moreover, we asked our respondents to subjectively evaluate the quality of their own networking skills. The results show that researchers are clearly aware of the crucial role of networking in their research careers; they also encounter the positive aspects of networking as well as its downsides; and although they have not been formally taught the importance and methods of networking, the older generation in senior positions may already be keen to share their experiences with younger researchers. The modes and self-assessment of networking varied by gender, with women's disadvantage in the social sciences also confirmed. Another novel finding of the

¹ The research was funded by the grant NKFIH 116102 entitled "Career models and career advancement in research and development. Different patterns and inequalities in labour market opportunities, personal network building and work-life balance".

research is that social scientists perceive countryside residence as a disadvantage for networking in Hungary.

KEYWORDS

network, professional networking, gender inequalities, doctorates, social sciences

DOI 10.14232/belv.2024.1.3

<https://doi.org/10.14232/belv.2024.1.3>

Cikkre való hivatkozás / How to cite this article:

Paksi, Veronika – Tardos, Katalin (2024): Professional networking in the field of social sciences. *Belvedere Meridionale* vol. 36. no. 1. pp 43–54.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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INTRODUCTION

Network building, or “networking”, is of paramount importance for the professional development and career advancement of researchers and academics. Network building implies and presupposes mutual help, which is a mutually beneficial activity (TRAVERS – PEMBERTON 2000), as the network creates social capital, status (BURT 1998) and community (PUTNAM 2000). Researchers also develop informal relationships, as they do not cease to be human outside the organisations. Informal networks can be created accidentally – because their existence provides a sense of security for individuals, reduces tension and stress, and enhances self-esteem – and consciously, when someone tries to gain information or power within an organisation by bypassing formal relationships. Meanwhile, formal and informal networks of relationships are so intertwined that it is difficult to separate them (MINTZBERG 1983).

Networks are key elements in the development of science: the dissemination of scientific knowledge, the visibility and recognition of scientific achievements, and the exchange of information and results all take place through networks (HAEUSSLER 2011). Researchers acquire new knowledge and skills through formal and informal networks, which enable them to embed themselves in the scientific community (RAWLINGS – MCFARLAND 2011; PATARIA et al. 2015). In the world of science, the role of networks has been most studied in relation to authorships (publications) (ABRAMO – D’ANGELO – DI COSTA 2009), research collaborations (JONES – WUCHTY – UZZI 2008; ADAMS et al. 2005), mentoring (FEENEY – BERNAL 2010) and leadership (EBADI – SCHIFFAUEROVA 2015). Not without reason, as these are perhaps the most important areas and

indicators of knowledge flows and career progression. For example, the assessment of researcher performance is increasingly based on objective measures such as the number of publications and citations (MUSSELIN 2008), which in turn is based on researcher collaborations.

Professional progress naturally is influenced by many factors other than the network, such as the organisational culture or the ranking and network position of the institution (GIBSON - HARDY – BUCKLEY 2014; VAN BALEN et al. 2012). One of the main characteristics of networking is that it differs according to gender, i.e. women and men network differently and build different types of networks (IBARRA 1993), and this is also the case in academia (FOX 2005; FORRET – DOUGHERTY 2004; MCGUIRE 2000). For example, having children can make it more difficult to (re)build a network of relationships and thus negatively affect performance, especially for women (MOSS-RACUSIN et al. 2012; HUNTER – LEAHEY 2010).

Gender differences in the development of professional relationships have been studied mainly in the male-dominated STEM fields (Science, Technology, Engineering and Mathematics), where women are a significant minority (ABRAMO – D'ANGELO – MURGIA 2013). These studies have highlighted the fact that women are less aware of the importance of the network (BURKE – ROTHSTEIN – BRISTOR 1995). An international study of 26,000 people in 19 countries found that women are less likely to participate in international collaborations, and that men without children (whose partners are researchers) are the most likely to have international relationships, while women (whose partners are not researchers) are the least likely (UHLY – VISSER – ZIPPEL 2015). Moreover, research on the type of professional collaboration has shown that women tend to be more involved in mentor-based collaborations, while men are more involved in networks linked to work-related tasks (BOZEMAN – GAUGHAN 2011). Nevertheless, there have also been studies whose results show no gender-based differences in researcher collaborations (BOZEMAN – GAUGHAN 2011; MELKERS – KIOPA 2010), and instead see differences in geographical location and academic status (KEGEN 2013).

Our study is based on empirical research on the individual professional network building of doctoral social science researchers and academics in Hungary. During the semi-structured individual interviews, we explored the main characteristics of the doctoral holders' network building, and also the main network arenas of academic life: publication, research collaboration, conference participation, and for differences in these network arenas by gender, geographical location and age. Domestic research has not yet examined the networking of doctoral holders in such depth, and although there have been studies on the disadvantaged position of women in STEM fields (LANNERT – NAGY 2019; PAKSI – NAGY – KIRÁLY 2016) and a literature review on some characteristics of workplace networks, including gender differences (KÜRTÖSI 2004), there is little qualitative information on professional networks in research and innovation (R&D). Therefore, in this paper we present the main characteristics of networking of doctoral holders participated in our qualitative research. Based on their subjective perceptions, first, we examine the extent to which the researchers are aware of the importance of network building, then we show whether they have learned about professional network building during their careers, and how consciously they have built and are building their professional relationships, finally we describe how they evaluated their own network building.

METHODOLOGY

The population of our study consisted of PhD holders in social sciences living in Hungary. Twenty-five semi-structured interviews were conducted with researchers and academics with PhDs in the social sciences. The sample available for this research was selected by non-random purposive sampling. We sought to represent a diverse sample of PhD holders: women and men, younger and older professionals from countryside towns (Debrecen, Szeged) and the capital (Budapest), public and business sectors in R&D and from different disciplines. The basic distribution of the twenty-five people with scientific degrees is as follows: 14 men and 11 women; 15 interviewees from Budapest, 6 from Debrecen and 4 from Szeged. Approximately half of the interviewees were under 40 years of age, the other half were over 40 years of age, and all but three researchers worked in the public sector. The interviews were mainly conducted face-to-face, with only a few cases via Skype between 2017 and 2018, and lasted on average one and a half hours. The interviews were coded and analysed using NVIVO qualitative software.

RESULTS

The importance and role of relationship building

The social science doctorate holders we interviewed considered personal network building of high importance, regardless of gender. In their opinion, research projects, conferences and publications are clearly the most important arenas for building professional relationships. Research projects were rated as the most important by both men and women, while conferences and publications were cited as a priority networking tool by men in the interviews. Many felt that although a wide network of contacts is not necessarily important for teaching, what counts more is “whose person you are”, namely, the extent to which you are embedded in the institution. In several cases, interviewees working in universities in Szeged or Debrecen pointed out that a student who graduates from a countryside university has a very low chance of being accepted to a doctoral school in another university, especially not in Budapest, which is an irrecoverable disadvantage in their career.

“The academic network you come from makes a big difference. Staying at university (permanently employed) is still by invitation only. (...) Szeged, Debrecen, Pécs, I don’t feel disadvantaged there, because they are planets revolving around themselves; I could describe them as having their own little epicentre around which they orbit. I think there is practically no chance outside of these universities in the countryside. If you’re studying at the University of Sopron and you’re not doing your PhD in Budapest or in one of the countryside centres, I think it’s a career dead end.” (Interviewee #12, Szeged, male, over 40).

The role of participation in professional committees or organisations in network building came up several times during the interviews. A female researcher emphasised the positive side of science administration, saying that those who put in the time and effort to build good contacts, and those who manage to get involved in the work of a scientific committee, where they initially act as a science administrator, can build good contacts. However, one male researcher rather highlighted the downside of science administration when he criticised the fact that colleagues with few scientific

achievements can also succeed if they are actively involved in science administration thanks to their good contacts. *“He has publications etc., but the content is not really what he writes, what he researches, but who he knows and what he organises. The problems start where they start giving out science titles for science administration.”* (Interviewee #01, Budapest, male, under 40). In his case, the criticism is more about the judgement of scientific performance, which also evaluates the work of science administration. The problems of measuring scientific performance were also criticised by several researchers.

Finally, the social scientists interviewed highlighted the negative role of network building in other cases. Typically, women researchers from countryside universities indicated that networking had given undeserved advantages to several of their colleagues who had gained senior positions through intensive networking without the appropriate knowledge and expertise. *“Of course, it’s an objective matter of how to get ahead in the academy ranks, but a lot of that is overridden by who has what networking capital.”* (Interviewee #06, Debrecen, female, under 40).

Building the network

Social scientists have described their own networks in comparison with STEM fields, but we also asked them to do so. The consensus was that the social scientists’ network is slightly more extensive than that of their colleagues in the natural sciences and technical fields. They believe that the specificity of the discipline means that social scientists work in a more open scientific community. Some argue that this open community is also due to the inherently more open personality of social scientists and that they have somewhat better communication and other networking skills than scientists in STEM fields. Accordingly, the role of skills in networking was seen as a priority in the social sciences, where the presence of skills is an advantage and their absence a disadvantage in the field. They agreed that good communication and networking skills help career progression and that a well-constructed network can compensate for minor professional shortcomings, as one of our interviewees in the capital put it. *“I have seen unsuccessful doctor of the Hungarian Academy of Sciences applications from scientists I consider to be very good. He’s not a doctor of the Hungarian Academy of Sciences and he never will be, because (...) he doesn’t communicate well and he’s made a lot of enemies.”* (Interviewee #01, Budapest, male, under 40). However, interviewees argued that communication and networking skills are highly personality-dependent, not everyone has them, but added that these skills can be developed, i.e. networking can be learned. Several scientists would see it as useful to teach and learn networking, even in a formalised way, as this female researcher emphasised:

“Increasingly I think it’s more important to have these personality traits and these skills, how I approach others, how I try to say something. So I think people should learn psychology to put themselves in the other person’s shoes. (...) Because it’s one thing what I want, but the other thing is how can I get him to behave the same way or how can he cooperate with me.” (Interviewee #25, Budapest, female, under 40).

Interviewees also expressed that the openness of their discipline has led social scientists to be more open to other disciplines, initiating more research collaborations, which has resulted in an increase in interdisciplinary publications. Interdisciplinary network of a young sociologist, for

example, has been built up in an unusual way by acting as an intermediary between the life sciences and the natural sciences.

“In fact, it was so decisive that it became part of my professional identification (...) working on a project with epidemiologists, mathematicians and me as a sociologist. Roles spontaneously developed, which they later couldn’t talk about because they didn’t understand each other’s profession. They used words differently [...] and I developed a mediating role there, which later became formalised.” (Interviewee #15, Budapest, male, under 40).

At the same time, several social scientists noted that networking opportunities may vary from discipline to discipline depending on the type of work organisation. Where teamwork is less common, such as in law and history, it is more difficult to build a broad network of contacts due to their relative isolation. Finally, it was pointed out that, unlike in the natural sciences, particularly in engineering, their broad network of contacts is unfortunately less likely to be translated into economic capital.

Awareness

The research also explored whether the interviewees were aware of the importance of networking at the beginning of their careers; whether they had ever learned how to build a good professional network; and how consciously they built their networks. Few of the twenty-five interviewees had attended any communication or knowledge management courses or training, and few had been taught or encouraged to network informally. They typically mentioned that there had been a course at university in the fields of sociology and economics, where the importance of networking was discussed, mainly in relation to the importance of references and publications. Meanwhile, they were not significant, and were a long time ago, and their memories faded. In these disciplines, however, they do see their colleagues occasionally teaching network building, but mostly only those whose research area is about networks explicitly.

Young women social scientists repeatedly missed that not only had they not been taught about the importance of relationship building, but that they were not supported to date, especially in practice. On the one hand, their supervisors or senior colleagues are not likely to share their contacts, or they are not so likely to be introduced to the world of academic communities. On the other hand, even if they manage to attend a conference, they are not able to take advantage of the networking benefits due to a lack of confidence, as this young economist from Budapest has well described: *“There is no one to hold my hand at a conference to take me there, to introduce me, they don’t even teach it or do it at home. I don’t know whether they do it abroad or what the situation is there, but it would be very, very good if they did it at home.”* (Interviewee #22, Budapest, female, under 40).

On the other hand, a senior female sociologist from Debrecen said that young female colleagues do not dare to address more experienced colleagues even if they have the opportunity to do so, due to a lack of confidence. Moreover, if the person is male, it makes them even more discouraged. However, she stressed that these young women colleagues are good professionals, as their publications show. *“What I see with my colleagues, the young beginners, the young girls in particular, is that they start to have this girlish behaviour; that they get embarrassed when they*

talk to a person in a higher position or when they talk to a man (...) and they can't really show themselves. They don't have the confidence to represent their professional credibility, which, if they close the door on themselves and put their knowledge down on paper, is a fantastic thing." (Interviewee #22, Debrecen, female, over 40).

Very few of the interviewees we interviewed thought they were consciously building their professional relationships. Women repeatedly emphasised the role of luck rather than awareness in helping them in their careers, and the importance of building professional trust that can bring the expected results in the long run. A disadvantage for women was that the time lost as a result of having children can significantly reduce the time available for relationship building. Men took much longer than women to think about consciously building up their network of professional contacts. They see the lack of conscious network building in R&D more as a systemic problem. A social scientist in the capital, who has a deep insight into the way doctoral schools operate, cited, among other things, the still prevalent traditional teaching methods as not allowing the development of professional links between younger and older generations of scientists: *"This Prussian training does not in all its elements promote (the building of professional networks) such a master-student situation. It is also a kind of mass production (...), while, well, it should not be a frontal education system."* (Interviewee #03, Budapest, male, over 40 years old). The same interviewee also mentioned the peculiarities of the research funding system as a problem. In his view, it is the pressure to apply due to the underfunding of research creates interdisciplinary networks rather than professional interest – which is not particularly conducive to the development of science.

Taking this idea further, a senior countryside researcher raised the problem of the Matthew effect, whereby only those who already have a network of some kind will have a wider network. From this point of view, he tries to raise his students' awareness of the importance of network building and to help them take the first steps as mentors: *"If you have a strong supporter when you are young, you will have a professional-scientific career very quickly, so you will be embedded in the professional-scientific community very quickly. That's what I teach young people to learn."* (Interviewee #05, Debrecen, male, over 40). Finally, in several cases, male researchers from countryside areas outlined that if they had any conscious professional networking, it tended to be collective at their university, because despite their best efforts, mainly due to distance, they were unable to get involved in professional communities in the capital. For this reason, they have consciously started to develop a strong common, local network of contacts in their field.

Self-assessment

The doctoral participants in our research were asked to assess their own individual professional networking to find out how satisfied they are with themselves, how they rate themselves and whether they would like to change. The following analyses are thus based on self-assessment and subjective perceptions of how skilled, practised and "skillful" the PhD holders are in building professional networks. As before, we have focused on gender and place of location differences, and we have also related the networks both to national and international contacts.

Most of the social scientists rated their own network building as either good or poor, with relatively fewer rating it as medium. Almost half of the 25 interviewees (12) rated their own networking as

“good” or “partly good”, while slightly more than half of the interviewees (13), rated their own networking negatively. A strong pattern emerged in terms of capital versus countryside region: among those who considered themselves good network builders, all but two were from the capital. There was also a significant gender difference in self-assessment: two thirds of men (9 out of 14) and only a quarter of women (3 out of 11) perceived their own network building as “good”. The proportion of networkers with a “poor” self-assessment is clearly higher in countryside locations (8 out of 13).

Men who perceived themselves as poor networkers cited laziness and small-mindedness, and several countryside doctoral holders cited distance as a barrier, as we have seen above. Some also argued that they are aloof, “lone wolves”, like to go their own way and need trust to connect, which is difficult to develop at work. This is in line with the experience described above that networking also requires an open personality, according to the interviewees. *“Because I have this reluctance to approach someone or to seek a relationship with somebody. For me, one meeting is not enough, you have to have some kind of trust in the other person, without which it doesn’t work for me.”* (Interviewee #16, Debrecen, male, above 40). For women, a lack of confidence and self-assurance was clearly a deterrent, and they often cited networking – in their words, “smooching, fraternising” – as not fitting their personality. *“Obviously, it could have been easier if I had a different personality, because that’s the kind of person you really need in the academy and for networking.”* (Interviewee #24, Budapest, female, under 40).

At the same time, both genders clearly acknowledged their own responsibility for their poor networking skills, which they felt needed to change. Doctoral holders in the countryside and capital universities who considered themselves to be moderate networkers (a mix of women and men) typically had been able to build a relatively wide network over their professional careers. However, their self-assessment is more negative, as they either consider the role of the network less important in their career progression or would consider a more extensive network to be more fortunate. *“So I’d rather devote my energy to reading and writing than to building relationships. I know that’s a bit of an old-fashioned attitude in this day and age, by the way, so I could hype myself up even more, but for some reason I just don’t have the stomach for it. But maybe I will.”* (Interviewee #01, Budapest, male, under 40). We also found examples of people who had little interdisciplinary links and use of social media, or whose own discipline was less emphasised at university than at universities in other regions.

DISCUSSION AND CONCLUSIONS

In our research, we asked twenty-five researchers and academics with PhDs in the social sciences about the importance they attach to network building in their own profession and career development. We explored whether they have been trained for networking, and how consciously they build their professional networks. Moreover, we asked our respondents to subjectively evaluate the quality of their own network building. The modes and perceptions of networking were found to differ by gender. As a new finding, our research has highlighted that countryside residence is perceived as a disadvantage in networking by researchers working in the social sciences.

Results show that researchers are clearly aware of the crucial role of networking in their research careers. Respondents, regardless of gender and place of residence, considered the building of

a personal networks to be of paramount importance and crucial to career progression. The narratives of those with a PhD degree also reflected an awareness of the importance of a personal network as social capital, an investment into the future and an essential factor for professional success (BURT 1998; PUTNAM 2000). However, in addition to the positive evaluation of the effects of networking, there was also a strong emphasis on the view that effective networking can have a negative impact on the supposedly objective evaluation of academic performance (MUSSELIN 2008). Some interviewees argued that, in contrast to the meritocratic principles that characterise the world of science, a high level of network capital and effective science management introduce subjective elements into the evaluation of scientific performance and may even replace real knowledge and performance or, on the contrary, prevent the validation of existing knowledge. The ambivalent - both positive and negative - assessment of the role of the personal networks is therefore a dominant phenomenon among people with a scientific degree.

Research projects, conferences and publications were identified by researchers as the most important arenas for building relationships, in line with trends described in the literature (ABRAMO – D'ANGELO - DI COSTA 2009; JONES – WUCHTY – UZZI 2008; ADAMS et al. 2005). The initial choice of a research topic, the continuation of the research area of the PhD supervisor, the adoption and extension of their network, on the one hand, indicate a positive, reciprocal relationship, which can greatly facilitate the integration of young researchers into the profession (TARDOS – PAKSI 2020). On the other hand, the opposite may be expected: for example, in the evaluation of EU ERC proposals, the criterion for research performance includes explicitly that the applicant should have an independent research topic from their PhD supervisor, and above all, that they should not co-author papers with their former supervisor.

Social scientists involved in our research have also typically sought to build interdisciplinary links. The openness of social scientists stems not only from the specificity of the profession, but also increasingly from their explicit search for collaboration with STEM disciplines. Indeed, performance-oriented science is increasingly forcing researchers to publish in high-prestige Q1 or Q2 journals. This goal can be more easily achieved if social scientists publish their research results with STEM colleagues in STEM journals (MUSSELIN 2008). However, it is not enough to seek and find relationships, but the acquisition of a 'common language' and meaningful communication between disciplines also need to be developed for efficiency and sustainability. This may also reduce the experience that professional social science contacts are poorly translated into economic capital.

The social scientists we interviewed had hardly ever encountered courses teaching relationship building, and had not participated in them during their careers. The interviews show that the younger generation already explicitly misses practical help and support in professional networking, but it is also evident that senior researchers are already making a conscious effort to teach the younger generation, albeit in a more informal way. They repeatedly stressed the importance of being able to learn and teach in a formalised way how to build professional relationships, in order to build their network of professional contacts more consciously in the future. Respondents also highlighted structural problems, such as the way teaching is carried out in universities, their organisational culture and the way they fund research being less conducive to the proper professional embedding of young people. All these practices and insights are encouraging for the future, but in no way make up for the gap highlighted by the social scientists interviewed: academic institutions should provide more support at individual and organisational level to build a positive, supportive environment, which would increase

professional collaboration by building up networks of contacts and thus improve the performance and career development of researchers.

During the interviews, we came across several phenomena that were a disadvantage for the women researchers, confirming the findings of previous international research. Lack of self-confidence and childbearing may also make it difficult for the female researchers in this study to build a network of relationships (MOSS-RACUSIN ET AL. 2012; HUNTER – LEAHEY 2010). Furthermore, the difference between women's and men's self-assessment of their networking skills was also noticeable. Women tended to underestimate their own networking skills compared to men, a phenomenon that has been typically found in STEM fields in the literature (FOX 2005; FORRET – DOUGHERTY 2004; MCGUIRE 2000).

Similarly, to international research findings, place of residence and geographical location were also decisive in the researchers' self-assessment of their networking skills (KEGEN 2013). The majority of those who considered themselves good networkers were from the capital, while those with poorer networking skills were over-represented among researchers working in the countryside towns. The overwhelming majority of social scientists reporting a positive self-assessment of networking skills were Budapest residents, while the majority of those with a negative self-assessment were countryside residents. In terms of countryside-capital competition, the question also arises as to what extent the difficulty of navigating between institutions in the country and in the capital can be attributed to the weakness of individual network positions or to differences in network positions between institutions.

Future research on professional networking should compare early and later career stages, the role of childbearing, the system of reciprocity, different types of relationships, formal and informal networks, the impact of the PhD degree and managerial position on professional networking. Furthermore, it would be worthwhile to examine whether there are gender differences in the way relationships and networks are built - or not - with PhD supervisors, and the impact on researchers' careers of having to break previously established relationships due to external professional demands.

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The narrative organization of social representations in life stories



ABSTRACT

Introduction: This paper explores the evolving landscape of narratives, distinguishing it from the traditional approaches of classical cognitive psychology and social psychology. While cognitive psychology strictly models interpretations based on causal relations, narrative psychology perceives memory, thought, and perception as story construction processes, asserting that individuals contextualize experiences within narrative structures.

Aim: The primary objective is to identify the factors shaping narratives, specifically within the context of referentiality, temporal structurality, and their implications for subjective well-being interpreted through social representations.

Methodology: The research framework adopts a sociology-influenced lens to interpret narratives, emphasizing the determinacy of social situations and specific time periods. The narrative schemata is dissected, viewing it as an organizational tool for past events. To bring depth to the exploration, various life stories such as „*the never tired worker*” and „*the photojournalist*” serve as illustrative examples.

Discussion: Exploring the role of referentiality and time within narratives, the essentiality of temporal structurality is emphasized. By juxtaposing distinct life stories, the nuances in social representations and their confluence in shaping narratives is underscored - reflecting to sources of subjective well-being.

Conclusion: Personal narratives offer a fresh perspective in the field of sociology, opening doors to understanding how individuals create meaning through stories influenced by their social surroundings and temporal contexts. This framework promises insightful avenues for analyzing subjective well-being through the unique lens of social representations.

KEYWORDS

personal narrative, social representation, narrative organization

DOI 10.14232/belv.2024.1.4
<https://doi.org/10.14232/belv.2024.1.4>

Cikkre való hivatkozás / How to cite this article:

Tóth, Dalma (2024): The narrative organization of social representations in life stories. *Belvedere Meridionale* vol. 36. no. 1. pp 55–66.

ISSN 1419-0222 (print)
ISSN 2064-5929 (online, pdf)

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INTRODUCTION

In recent decades, not only the positive psychology movement has emerged as a new approach in the field of psychology. Undoubtedly, its influence is not only felt within psychology, but also in other disciplines and borderlines (sociology, social psychology and anthropology). The new paradigm of narrative psychology can be contrasted with the approach of classical cognitive psychology, which, as a corollary of the affective revolution, opened doors in the field of research that, although with the historical background of previous attempts, represented a new direction. Sabrin detects a contrast between the two trends by drawing an analogy between the modeling and interpretation of phenomena¹. Whereas cognitive psychology models the interpretation of the environment and the processes of meaning-making in a non-constructive way, subject to strict causal relations, narrative psychology approaches the processes of remembering, thinking and perception through processes of story construction. It assumes that individuals weave their experiences into narrative structures. Events that are connected in time and space can be detected along plots in narrative, in which the context of events is determined by intentions, decisions and emotions. Accordingly, the interpretive framework of actions encompasses the meaning and significance of events.

In this paper I will attempt to identify factors that influence the narrative within the framework of the narrative orientation mentioned above. In discussing the role of referentiality, I will highlight the determinacy of social situations and time periods, while also describing temporal structurality as an essential feature of narrative. I interpret narrative schemata as the organisation of events of the past. The aim of this work is to establish a framework for the applicability of a narrative psychology approach to the analysis of subjective well-being through social representations.

¹ SABRIN 2001. 59–76.

THE FRAMEWORK FOR INTERPRETING NARRATIVES

Narratives have always been present in human daily life, since the linguistic, visual and auditory formations of our individual and social actions are as old as humanity itself. Our narrative stories can be communicated in myriad ways, but for the social researcher a different perspective is required. Narratives reveal a broader and deeper understanding of the world, showing not only what an individual or group is interested in and the subject of its interest, but also the context in which it is interpreted, the interactions along which it is interacted with, and the actions it is linked to. One's narrative manifestations bring to the surface one's subjective experiences of the world, of society, which, when presented through experience, can be latent – that is, unconscious. Accordingly, one of the salient aspects in interpreting narratives is the separation of cognitive and affective content².

Bruner describes two basic forms of thinking when he argues for a narrative orientation³. These are the pragmatic and narrative modes, neither of which can be traced back to the other. With regard to the pragmatic mode, he described how it is possible to infer generally valid causal relations when observing events. The abstract conceptual tools can be used to map causal relations in order to understand the objective picture of reality in the analysis. The narrative mode is specific in that its tools are of a different nature. In this mode, events can be used to formulate an interpretable historical framework rather than an objective reality. The intentions and actions of people are then brought to the fore, which can contribute to an understanding of psychological reality.

As the distinction between affective and cognitive content suggests, „narrative knowledge” is a set of intersubjective experiences, since whether it is an individual or a group interpretation of reality, a differentiated approach serves to deepen the understanding of content. Thomas and Znaniecki identified the interpretation of the thought and emotional content objectified in the communicated meaning as an objective component of social life, since the members of an individual or (social) group have subjective characteristics that they share - a pillar of the construction of their common reality can be found in this. Two perspectives can help the researcher in exploring this phenomenon: the complementary theoretical and the ‚eidetic’ perspectives. Complementary theoretical perspectives refer to the contextual interpretation of the subjective perspective, while the ‚eidetic’ perspective refers to the imagined base of social knowledge (which complements the concrete, real and perceived reality)⁴.

In the following, I will present interpretative frameworks that can provide a basis for exploring narrative contexts. One such approach is narrative schemas, which show the ways in which individuals and groups operate by functionally simplifying reality. The other context highlights the role of time, which is prominent in narrative analysis. By incorporating these two perspectives, I will explore the interpretation of social representations.

² HARDY 1968. 5–14.

³ BRUNER 2001. 27-57.

⁴ PÁSZKA 2009.

WAYS OF ANALYZING NARRATIVE SCHEMAS

The concept of schema has a long history in cognitive psychology. It is intended to bridge the epistemological gap between the changing nature of reality and the system of human experience. Schema is the active organization of reactions and experiences in the past. The narrative nodes used to recall the past play a restructuring role in defining the interpretive framework of events by shaping the experience of the present. During active organization, changes in constructs can occur through processes of abstraction and incorporation⁵.

In the process of remembering events, contextual information can be modified for interpretability. The purpose of interpretation in biographical memoir is to reconcile past and present in order to maintain interpretive coherence⁶. In this reading, stories act as a memory organizing force that gives the narrative its schematic character. This view is consistent with the narrative principle, which understands the construction of narratives within the framework of the individual.

The elements of the schema were described by János LÁSZLÓ (2008), in which he emphasized that historicity and causality make sense in temporality. The individual's personal cognition in role integration with his reference group and the ideologies that affect the individual determine the individual's self-interpretation both in the present and in the process of remembering the past⁷. According to Hardy⁸, narratives provide opportunities for the expression of a range of cognitions and emotions. Among others, he cites dreams, hopes, beliefs and remembering as examples. A pattern is characterised by a beginning, a climax, a nadir and an end. In relation to the aforementioned temporality, other researchers have also argued that narratives cannot always be considered linear, because in most cases they are characterised by cyclicity. Schemata can be spoken of as phenomena in a system of social relations as summations of shared knowledge. Within the narrative schema theories, Bluck and Habermas⁹ have developed a theory of theoretical schema. According to them, autobiographical memories are not always life story memories, as life story memories can be associated with memories that have an emotional charge and either influence the development of the individual or explain the motivations for development. These are not simply significant life events in themselves, but are organised in a structure where the context carries a meaning that extends to the life story as a whole. The authors call this a life-history schema. On this basis, we can say that the elements of mental representations of life stories can be associated with cognitive, affective and motivational components. The organizing power of coherence can be described along the lines of temporality, thematicity, cultural and causal relations.

⁵ SZOKOLSZKY 1998. 209–235.

⁶ KOLOSAI 2012.

⁷ ERIKSON 1991. 455–472.

⁸ HARDY 1968. 5–14.

⁹ BLUCK – HABERMAS 2000. 121–147.

THE ROLE OF REFERENTIALITY AND TIME IN NARRATIVE

Both the role of referentiality and the role of time are key to the approach to narrative. In an earlier work, Bruner¹⁰ argued that the narrative can construct its own reality. He describes the existence of social situations that can predetermine the structure of content. Such as the appearance of corruption stories in the narratives of individuals. However, there are cases that are conditional on narrative truth. In these cases, stories with positive outcomes may help individuals to activate coping modes¹¹.

At the intersection of time and referentiality may be the narrative of history, since in narratives about history not only the condition of narrative truth may be fulfilled, but also fictional realities may appear. White¹² distinguishes three forms of historiography, which are annales, chronicles and historical texts. In annales and chronicles, there is no connection between events, apart from chronological order. The chronicle differs from the annales in that it has a central concept around which the content is woven. In contrast, the historical text also reveals the context. According to László¹³, the intentional states of narratives, whatever form they take, do not contain causal relations, since they cannot appear in descriptions of the past as the cause of events because of their temporality. In this sense, if we want to define the hermeneutic composition of narratives, we cannot speak of clarity, only of contradictions or consistency of the constituent elements. In hermeneutic analysis, the main question may therefore be what is the reason why the narrator mentions the story in question.

The temporal structure of narratives is shaped by events, and therefore narrative time is relative in this sense¹⁴. The devices of condensation and omission are at the expense of the intelligibility of calendar time, but at the same time, according to Labov and Waletzky¹⁵, it is through narrative nodes that narrative can become clear. This is also possible because the relationship between past and present is not unidirectional. Events of the past influence the narrative of the individual or group, while the present content is reinterpreted. Connerton¹⁶ has articulated that our knowledge of the past is a shaping factor in our perception of the present, but at the same time, interpreting the past can provide answers to ways of interpreting events in the present. Representations of historical events thus reveal subjective readings of group narratives that appear objective¹⁷. Through functional selection, the social construction of the past reflects the emotional and cognitive needs of the present¹⁸, which allows the past to be rewritten. The construction of new constructs may be true not only for the perspective of time, if we think of generations¹⁹, but also for social groups that, due to their segregation from the majority society, do not adapt their own interpretations to the social realities of the majority society due to a lack of interaction.

¹⁰ BRUNER 1996. 93–105.

¹¹ LÁSZLÓ 1999.

¹² WHITE 1997.

¹³ LÁSZLÓ 1999.

¹⁴ RICOEUR 1884.

¹⁵ LABOV – WALETZKY 1967. 12–44.

¹⁶ CONNERTON 1989.

¹⁷ LIU – HILTON 2005. 537–556.

¹⁸ LÁSZLÓ 2003. 180–192.

¹⁹ RIMÉ et al. 2015. 515–532.

The social representation of history cannot be understood as a group-level process only, as the identification of individuals with the group is a prerequisite for the construction of social reality²⁰. Volpato and Licata²¹ identify pride as a means of identification for the reception of group constructs. Emotions with negative content, on the other hand, form the opposite relation²². If we look at the process from the group's point of view rather than the individual's, we can say that identification can lead to group identity and the adaptation of social reality when positive emotions are expressed. Negatively charged emotions, on the other hand, often preserve the narrative representation of events^{23 24 25}.

USING THE NARRATIVE APPROACH IN SR RESEARCH

Narrative thinking and methodology can also be found in the tradition of social representations. Halbwachs²⁶ has written about the important role of narratives in translating social experiences into language - stories are constructed and shared, which can provide a sense of community and identity.

If we return to the roots of social representation theory, we can also discover claims for a reading of narrative in Lévi-Strauss's theorisation of myth. The normative content of myths as narratives can determine the constructs that preoccupy society. They can also be understood as a classification scheme because they can provide an understanding of the social world. They provide integrity and continuity at the level of society²⁷.

Bahtyin²⁸ describes the discursive character of narratives. He sees their intersubjectivity in the fact that, in addition to their storytelling capacities, narratives function as public bearers of experience. According to another author, the social character of narratives is revealed in the fact that they carry elements of social knowledge rather than individual experience. The intra- and inter-group exchanges of narratives reflect the conclusions of theories on the epidemiology of representations. The nature of representations is reflected in the exchange processes. Back and forth shaping characterizes the process between individuals and groups.

In social psychology, the concept of attitude is highlighted by László²⁹. Thomas and Znaniecki³⁰ argued for a position against Durkheimian foundations in their factual approach, rejecting objectivist foundations by conceiving of attitude as a controlling factor in cognitive processes and behavior. This perspective shares a common intersection with social

²⁰ LIU – HILTON 2005. 540–550.

²¹ VOLPATO–LICATA 2010. 4–10.

²² KURTIŞ – ADAMS – YELLOW-BIRD 2010. 208–224.

²³ BAUMEISTER–HASTINGS 1997. 277–293.

²⁴ KURTIŞ – ADAMS – YELLOW-BIRD 2010. 208–224.

²⁵ ROCCAS – KLAR – LIVIATAN 2006. 698–711.

²⁶ HALBWACHS 2021.

²⁷ LÁSZLÓ 1999.

²⁸ BAKHTYIN 1981.

²⁹ LÁSZLÓ 1999.

³⁰ THOMAS – ZNANIECKI 1918.

representation theory. Nowadays, narratives are mainly used in ethnographic studies using interviews³¹. Interviews are also commonly identified as pseudo-narratives. The methodological orthodoxy stems from the fact that the interviewer also has an influence on the formulation of the narrative. This is not a uniform position among researchers on social representations, with some trends recognizing the narrative genre of the interview and others advocating a positivist approach.

Social representation theory assumes that the use of stereotypes about thinking in terms of categories, the assignment of value to constructs, and possible stereotypes is a given. Social representations also represent an understanding of reality on another plane, since they are at the same time knowledge domains³².

SOCIAL REPRESENTATIONS IN LIFE STORIES

After presenting the theoretical background related to social representations in narrative stories, I will outline the units of analysis identified in the literature using two life stories. The two life stories share a number of similarities, the potential of which I will make visible in the domains of knowledge and emotion.

The audio material was recorded in the summer of 2023. The monologues were 2-2.5 hours in length. In terms of method, it is a life history interview, which I explored by asking the individuals a single question: please tell me about your life! Both interviewees live in a village in Szabolcs-Szatmár-Bereg county. In my research, the aspect of place of residence is important because I wanted to understand the past of individuals belonging to a (socially and geographically pejoratively) segregated social group. I have identified work as the main dimension of the analysis, which I examine along two sub-dimensions: first job and job change. These life events can be interpreted as rites of passage that become visible through social acts and interactions. The analytical toolkit is provided by McAdams' life history model of identity³³, according to which I analyze the interviews in terms of ideological background, imagos, nuclear episodes and generatively scenarios.

The never tired worker

The first interviewee (Z.) is a 61-year-old man who has spent a good part of his life in the municipality in question. He linked the success of his first job to his profession, which also reveals the ideological background of the time. Before the change of regime, the role of skilled work as a social status marker took on a different meaning than it does today. The description of his first work reflects the presentation of his knowledge along cognitive processes, which is a linguistic formulation of social representation³⁴. The positive label of skilled work could be associated

³¹ JODELET 1989.

³² MOSCOVICI 1984. 3–70.

³³ MCADAMS 2001. 100–122.

³⁴ HALBWACHS 1925.

with positive emotions, but looking at the text we see nothing but a listing of events in a strict chronological order. These nuclear episodes are functional selections of the recollection of the past³⁵. In the text, we can notice a McAdamsian imago in the rural-capital contrast pair in the context of the periodic change of the place of work. It can also be interpreted as a scenario in which the individual tries to perceive through the enumeration that he has been entrusted with more and more tasks, involved in more and more work processes, which can be interpreted as a latent attribute of pride³⁶.

„I’m a qualified machinist. I worked as a machine setter at MOM in Mátészalka. The machine operator was about being a machine operator on a press, but I also worked on a press, so we were casting aluminum. From there I was sent to MOM in Budapest for further training. From MOM I was up in Pest for a year. I came home as a hot press operator. I went back to work. The gay press was brought home from Pest, and I became a gay press. After the gay press I was a galvanizer.”

Z.’s memories of changing jobs were varied and made up a large part of his recollections. In mentioning the change of job, she first of all draws attention to the fact that she had to make changes to improve her life situation, which suggests negative emotions and thus presents a process of distancing³⁷. Mobility also appears in this narrative passage in organisational and geographical terms, which also appears as an imago according to McAdams’ categories.

„I worked in Galván. And my last job, so at MOM... Oh, sorry. Even outside of MOM, we were short on wages. We went to a foundry in Kocsord. I was there in Kocsord for a year, 9 months. Because the conditions there were very bad, and I came back to MOM, they called me back. That’s when I became a heat handler.”

Geographical mobility is also reflected in the context of positive emotions, including a sense of pride, in other parts of the life story. While geographic mobility for employment has positive connotations, the risk factor of disease becomes more pronounced with age. Thus, an intra-individual image emerges, with health and disease at the center of the contrast and the positive contextual link between geographical mobility and employment. However, a coping strategy to resolve the internal conflict appeared, which was evident through leisure activities: folk dance. Folk dancing was one of the most prominent positive factors in the interviewee’s life, through which he subsequently met friends, partners and had traveled.

„I spent two months at the Király György Technical College studying to be an airplane technician. After that I went to Kecskemét. I did my military service there. Then I got sick in 2000. A lot of steam and fumes, working in a hot factory, and all the irrigation. And so now I’ve got asthma... I’ve got asthma and allergies. I’ve got 3 or 4 allergy crosses. I’m allergic to everything. I’m allergic to dust. I left out that when I came home from Pest in the ,80s, in the ,80s, I wanted to study English. Well, you need something to keep you busy. I was so bored in Pest, so to say. We took English classes. I studied it for a month. We went for a month, but we had no books, we had nothing. So I saw them dancing in the big hall. It was folk dancing. So I said I’ll try that.”

Self-evaluation through work is described by the word creativity in the case of the interviewee. Whereas in the first stage of his life he considered quantitative factors through his ability to perform a wide range of activities. Nowadays creative work is a source of personal pride. At the same

³⁵ LÁSZLÓ 2003. 180–192.

³⁶ VOLPATO – LICATA 2010. 4–10.

³⁷ KURTIS – ADAMS – YELLOW-BIRD 2010. 208–224.

time, the sources of pride in this case include childhood memories of his father. This memory, by breaking the chronological order, highlights the importance of the parent's attitude in shaping value dimensions and thus the range of emotions.

„I'm ten... After eight years of primary school, I've been working since... Oh, ,89! Since ,79. Since ,79, I've been working ever since. I still have a job, because I make philagorias. So in my spare time I go to someone else's. I went to work there today. Well, I do little jobs like that. But I prefer wood. My profession is a metalworker, a mechanic, but when I was little, my father used to take me to work on the roof. So I still had this sense of carpentry (...) Well, I am the most proud that I found out how I can solve it? I'm proud of all of them, except that somewhere above my head is a dwelling, and let's say we made the roof. We made the roof. So it's my handwork. My poor father-in-law. I just remembered. My poor father-in-law and I put a coke roof up. You know what that is? So it's gabled, and the gable has this connecting piece. We put that on. It must have been 35 degrees outside. That's when we installed it.”

The photojournalist

The second interviewee (Cs.) is a 66-year-old man who has lived in the settlement for many years, but has spent most of his life in the capital. He recalled his first job, like Z., as a result of completing his studies. The coherence was thus fulfilled in the temporality, to which causality was attached. We will see later that the presence of these structures paints a more complex and integrated picture in terms of narrative complexity, reflecting the individual frame of reference³⁸.

The recollection of the payment has several functions in interpreting the context of the story. On the one hand, by providing accurate information, the narrator provides himself with clues that are valid on a cognitive and affective level. As the initial salary was placed in a positive context by the interviewer, its quantitative visualization allowed placing it on the cognitive level in relation to today's salaries and in the system of the time. On the other hand, the affective domain is also presented as positive, as the ability to earn is shown behind the lines. The latent image of relating to others allows the individual to stand out especially in the community of the past.

In this life story, the need for a second job also appears which testifies to the ideological background. Within it one can find normative values of work and livelihood. The interviewee described, in a summarizing way, the lengths he had gone to in order to create a better life for himself, which paints a generatively scenario that suggests the coping mechanisms of the time. What makes the actions and the way in which they are carried out specific to the age is the way in which the process, i.e. the aim, was achieved. A sense of individual responsibility and the willingness to take action also appear in this narrative as a driving factor.

„The point is that after two years, at the age of 20, I got my certificate as a photographer. But in the meantime I was already working for the county paper: Kelet Magyarország. I remember they paid 79 Forints for a published picture. That was the price of about ten pints of beer if we convert the rate now. Now that would be about 4500 Forints, or 4900. Let's leave the finances for now. The fact is that the editor-in-chief, János Kolka, asked me to come in and he hired me as a journalist intern at the age of 20. I started working from 1 August 1977... I started working more or less

³⁸ LOEVINGER 1976. 265–297.

correctly in Kelet Magyarország. We travelled all over the county, I made a lot of friends. In the meantime I was a guest drummer because my brother needed a drummer for his band. Well, I got a B category at the OSZK. And we played at the Hotel Szabolcs for about two years. Before that, at Domino's. Then the Krúdy Hotel. And then we figured out that it's better to play gigs, because it pays better and you don't have to work Saturday and Sunday and in the bar until 4 in the morning. A wedding was profitable, or a ball, or whatever. And then we'd have a gig almost every weekend. And then what does God give? Well, I got married."

The change of occupation, as a transition rite, was caused by a reason outside the individual's control, brought about by the „lapse of his skills". The emotionally intense memories of the previous quotation, which were related to playing music („part-time job"), are contrasted in the following interview with the armed security guard job. This imago can be linked to the emotional basis of one's fulfilment, which assigns the enjoyment of work to having fun and entertaining others. The hidden financial necessity behind the passages has created a narrative intersection³⁹ that draws attention to the relative nature of time. The negative connotation of short-lived necessity serves as a means of alienation. It demonstrates that the existence of troughs and peaks in life is functional to both the domains of knowledge and emotion.

"When photography was no longer so popular, because every household had a camera, and photographic equipment, or whatever you want to call it. The point is, I was enrolled in Group Securita. This was after the change of regime, in '91. Because I was a soldier and I had a license to carry a gun. So Group Securita was a Dutch-Hungarian company. Then I was hired as a group leader there. We protected the rubber factory. It had 3500 employees at that time. And we protected various objects like that. It was a very well-paid job, because I earned more than my father and mother, including pension. And 12-hour duty, and the responsibility. We protected billions and millions of dollars. And it was not a popular one, because we replaced the police. The policemen were dismissed from the factories and plants, and then this company, Group 4, protected the assets and people and everything. And I worked there for two or three years, and then I got my, well, freelance, but I had to get an industrial license as a photojournalist, advertising and broadcasting. That was my... And my license number and my address and so on. And then I did that for about six or seven years."

SUMMARY

In this study I have attempted to demonstrate the narrative organization of social representations through the work-related life events of two personal narratives. The basic aim of narrative psychology can be formulated as the exploration of the narrative nature of thought and action in order to reveal the narrative systems that transform lived experiences into memories.

Three conclusions have emerged from the personal narratives along the variables of the McAdams identity life history model, which are consistent with the theoretical hypotheses listed in the original work. The first is that those with high levels of intimacy motivation among the McAdams' primary factors, i.e., their social relationships play a prominent role in the formulation of their positive life events, demonstrate an identity imago. Along with the life events of the first interviewee,

³⁹ LABOV – WALETZKY 1967. 12–44.

it was evident that folk dance provided the basis for positive emotions and thus identification, as well as the opportunity to live a social life. Pride in the profession was reflected in an appreciation of creativity, which was shown in the light of hopes linked to geographical mobility.

The other hypothesis of McAdams refers to the imago of power-motivated individuals, which operates with a center of efficiency and emphasizes its self-validating character. This form of self-actualization requires a different type of mechanism, more characteristic of the strategy of a freelance photojournalist than of a factory worker's strategy for labor market prosperity. The differences in narrative complexity were also apparent in this sense, as self-expression is well delineated through the examples of the two individuals. The domains of knowledge and emotion became visible in the narrative through awareness and pride. The cognitive field showed the value of the knowledge domain as the existence of 'something' (good job, decent working conditions, high salary) or the lack of it. The affective field drew out positive and negative emotions, i.e. pride and need, which described the emotion domains.

In conclusion, White's⁴⁰ category of story modes, historical text, was well observed in both individuals' narratives, as they presented, through their employment, the values, motivations and social interactions that interpreted both the pre- and post-change of regime from the perspective of the present.

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⁴⁰ WHITE 1997.

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The development of the ‚generation rent’ phenomenon in Hungary



ABSTRACT

„Generation rent” is a relatively new phenomenon in terms of sociological interest. The expression first came to relevance in the United Kingdom in the 2010s, and it refers to the fact that the younger generation lives in rented accommodation to a much greater extent and for much longer than members of the previous generations. In this study I present the origin and the short history of the the scientific term „generation rent”. In addition, I will attempt to review and provide an interpretation of how and why „generation rent” as a phenomenon originally appeared in the United Kingdom, where it first became the focus of academic interest, and how does it relate to Hungary, where a very similar phenomenon started to appear in the recent years. In this paper I’m attempting to show the main mechanisms that can lead to the formation of ‚generation rent’ and how they differed from the United Kingdom in Hungary while still led to a very simmlar outcome.

KEYWORDS

generation rent, housing, housing problems, youth, home ownership private rental sector

DOI 10.14232/belv.2024.1.5

<https://doi.org/10.14232/belv.2024.1.5>

Cikkre való hivatkozás / How to cite this article:

Varga, Áron (2024): The development of the ‚generation rent’ phenomenon in Hungary. *Belvedere Meridionale* vol. 36. no. 1. pp 67–80.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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1. INTRODUCTION

In this study, I attempt to present how the phenomenon called ‚generation rent’ developed in Hungary. First I briefly present the history of the appearance of ‚generation rent’ in the scientific discourse, pointing out the uncertainties and questions related to the use of the term. Next, I will present the situation in the United Kingdom by outlining the short history of the appearance of the ‚generation rent’ phenomenon, and then I will compare it to the history of the housing situation in Hungary after the regime change, in addition to examining the antecedents of the emergence of ‚generation rent’ in Hungary.

In the second half of the study, within the framework of a short international comparison, I will point out the most important mechanisms for the development of the ‚generation rent’ phenomenon. After that, I will try to show how a very similar situation could develop in Hungary to the situation in the United Kingdom, where the investigation of the topic originates. Although the housing situation and the history of housing differ to a large extent in the two countries, I argue that the conditions necessary for the formation of ‚generation rent’ were also present in our country by the end of the 2010s, despite the fact that the change was much more sudden and rapid.

2. APPEARANCE OF THE TERM ‚GENERATION RENT’

Before we begin to examine a phenomenon more thoroughly, it is always worth to briefly review when, and in what way the phenomenon first appeared in scientific discourse, and where the term itself – that we use to describe the phenomenon – comes from. The term ‚generation rent’ first appeared in May 2011, in a report detailing a survey, commissioned by the Halifax Building Society. The survey was conducted by the UK’s National Center for Social Research with 8,000 people between the age of 20 to 45. The results showed that more than three-quarters of respondents had not yet owned their own property. Almost two-thirds of respondents who did not own a home thought they would never own one, and only five percent of respondents, who did not own a home were trying to save for a future property purchase (MAXWELL 2011).

The term quickly became popular in the UK and was adopted into the mainstream media. Maybe because of its relative novelty and popularity outside the scientific discourse, the way the term is used is still somewhat ambiguous, and its definition is not entirely clear. What is consistent in the use of the term, is that it refers to the fact that a large part of the young generation lives in rental apartments, but to what exactly this proportion is and to what exactly it should be compared to (e.g.: ratios of previous years, overall social ratios, or the older generation living today), there are no uniform and clear definitions (CSIZMADY – KŐSZEGHY 2022).

The term ‚generation rent’ tries to capture a complex phenomenon with a simple, easy-to-remember term, but for this reason, it is important to review what researchers and professionals mean by it more precisely. It is questionable whether it is worth investigating ‚generation rent’ as a static or as a dynamic phenomenon? Some of the research focuses on the current actual housing situation of young people (KEMP 2015), while others look at the problem as a dynamic phenomenon and examines the housing trajectories of young people (BLACKWELL – PARK 2011;

MCKEE 2015; MCKEE – HOOLACHAN, 2015). The dynamic approach treats 'generation rent' as a group of people who are currently young, and who will enter later phases of their lives without home ownership, thereby experiencing life situations that were previously generally thought to be typical, to experience in one's own house, like raising children. (CSIZMADY – KŐSZEGHY 2022).

It is also questionable who can be considered young. Which group is worth investigating? In the sociology of youth, the 15-29-year-old age group is traditionally considered to be young people, however, in the case of the 'generation rent', it is better to examine the 18-35-year-old age group (MCKEE – HOOLACHAN 2015). The boundaries of youth are expanding more and more these days. This seems to be particularly evident in this specific topic: during the first researches related to it, the researchers pushed the typical age of the examined group up to 45 years.

3. GENERATION RENT IN THE UK

The reasons for the emergence of 'generation rent' in Great Britain goes back to the 1980s. During this period, half of the households, where the head of the household was of retirement age had their own property. While those households whose head of household was under 35 years old, 60 percent owned their own real estate.

By comparison, in 2019, 80 percent of households with a head of household over the age of 55 owned a property, while just under 30 percent of households with a head of household under the age of 35 owned their own home in the UK. The reason for this can be explained most simply by the fact that the generation, of which became property owners in the 1980s, still holds the majority of real estate assets. This is also proven by the fact, that the proportion of people with mortgages shows a continuous downward trend, as those who became owners in the '80s have already paid off their mortgages, and the number of new entrants is decreasing (RONALD 2018). The decrease in the number of mortgage loans may also be due to the fact that members of the younger generation are either afraid or unable to take out such loans, as financial institutions offer much less favorable loans to those who are buying their first property (BLACKWELL – PARK 2011).

Another observable trend is the increase in the proportion of people with multiple housing properties. These people also typically belong to the older generation (RONALD 2018). Another reason why the older generation began to accumulate real estate, was the neoliberal turn that occurred in the '70s, as people could count on less and less public assistance, so they began to invest their money into real estate, which later they could rent out to tenants, when they could no longer engage in income-generating activities (MCKEE 2012).

Another factor that helped this generation to accumulate real estate was, that the deregulation of the real estate market began in the 90s, as a result of which those who already owned a property began to receive more favorable mortgage loans from the banks than new entrants to the housing market. This meant that the generation that was born in the '50s and '60s, and became property owners at a young age in the '80s had already paid off the loan on their first property, so they could easily take out loans due to deregulation, for another property, which they felt they needed, because of the weakening of the state social sphere.

The results of this process were already visible in the 2000s: property prices began to rise sharply, due to apartments purchased for investment purposes, and the proportion of first-time owners began to decrease. The fact that buying a home became increasingly unaffordable also led to the rapid saturation of the narrow social rental sector, and as a result of these factors, demand for the private rental sector began to increase (FORREST – YIP 2012; KENNETT – FORREST – Marsh 2013). Although the private rental sector has been present in the UK for a long time, it really became dominant during this period. Between 1998 and 2015, both the number of principal tenants with multiple properties and the number of tenants using the private rental sector doubled – based on government data –, the members of principal tenants were predominantly born in the 1950s and 1960s, while the tenants are typically young people, under the age of 35 (RONALD 2018). The growth of the private rental sector became even stronger as a result of the 2008 economic crisis (KEMP 2015), which probably explains why research on the 'generation rent' began in the 2010s. In the United Kingdom, the topic has been on the agenda ever since, both in social sciences, in the media and in public discourse.

4. HOUSING SITUATION IN HUNGARY, ANTECEDENTS OF THE EMERGENCE OF THE 'GENERATION RENT'

Unlike the United Kingdom, Hungary is not a Western European country, evidently the formation of the 'generation rent' took place in a different way. In our country, as in other Eastern European countries, until the regime change, a completely different housing system was typical, compared to the Western world. In these housing systems, three basic housing spheres could be distinguished: the state sphere (state and municipal rental flats), the self-build sphere (typically in smaller settlements, the construction of owned flats, often built with the help of friends and family) and the market sphere (from the 1980s, entrepreneurs built city, family and apartment houses for sale). In addition to the much more significant presence of the state sphere, this housing system was also distinguished from Western systems by the fact that in socialist countries, housing forms outside the state sphere were also under political control (HEGEDÜS – TOSICS 1994). Among other things, this meant that the acquisition of privately owned real estate was also financed by state owned financial institutions.

The regime change and privatization that took place in the 1990s brought significant changes to the operation of the Hungarian housing system. Basically, two main changes took place: on the one hand, the number of privately owned properties increased as a result of the beginning of housing privatization; the proportion of properties owned by municipalities began to rapidly decrease, which continues to this day. In addition, the small stock of apartments still in municipal hands were and still are in a terrible condition (contributed to the fact that in the years to come, municipalities often tried to get rid of their poor-quality apartments, since they did not have the resources to renovate them, so they were often down-priced and sold to investors). On the other hand, the financing of housing loans through state owned financial institutions ceased, and their place was taken over by market based financial institutions from the beginning of the 2000s (CSIZMADY – HEGEDÜS – VONNÁK 2019).

Similarly to other ex-socialist countries, the housing privatization took place for a fraction of the real market value in our country. The legal conditions of the rental housing market also began to change: the previous legal framework was gradually expanded, giving the opportunity for the private rental sector to develop (HEGEDÜS 2018). The collapse of the previous housing financing system in Hungary and also in most post-socialist countries resulted in the development of a distorted housing regime, where private ownership clearly had the dominant role. In Hungary, the need for correction of this model was formulated in the 2000s, one part of which was the development of the market housing financing system, and the other part was the expansion of the social housing sector. Unfortunately political and economic interests were only really interested in building a financing system for private ownership, and the expansion of the social housing sector was generally pushed into the background and left behind (CSIZMADY – HEGEDÜS – VONNÁK 2019).

The current state government at this time saw the solution to the development of the housing financing system in the purchase of housing, financed with market loans. With this they tried to expand private ownership and believed that this could also be the solution to the problems of the lower social classes. During this period, low-interest, but high-risk foreign currency loans became common, and they stimulated the growth of private property. This trend was broken by the 2008 economic crisis, as a result of which foreign currency loans became unprofitable. In the post-crisis period, the same strategy for stabilization efforts as before began to be followed again: the encouragement of market-financed private property (HEGEDÜS – SOMOGYI – TELLER 2018).

In the period, following the 2008 crisis, until approximately 2013, the number of approved housing loans and the number of new and used homes sold, were far below the previous period. While nearly 150,000 home loans were approved in 2008, this figure hovered around 50,000 on average between 2010 and 2013.¹ The number of apartments sold also showed a similar trend: the number of apartment transactions between private individuals was 154,097 in 2008, but between 2009 and 2013 this number hovered around 90,000 on average². Thanks to European Union subsidies and the use of economic reserves (private pension fund, centralization of public service companies and investment delays), the economy began to stabilize again after 2013. The state economy (in no small part as a result of European Union subsidies) was consolidated by 2015: unemployment fell, incomes rose, and housing investments moved off their lows, also the number of loans issued at relatively low housing prices and low interest rates began to increase again.

The fact that serious changes took place in the housing policy, family policy and the system of housing subsidies also contributed to the trend (Szikra 2018): the home building allowance for families (CSOK) and the National Home Building Community (NOK) program were introduced in 2015 (CZIRFUSZ – JELENIK 2021), in addition, the housing savings fund scheme was extended. However, these social policy measures only started to make their impact felt in 2016-2017, when construction and housing loans started to rise again. Raising the CSOK started to encourage upper- and middle-class families with (many) children to

¹ Source: Hungarian National Bank (MNB) Housing Market Report 2018 May. <https://www.mnb.hu/letoltes/lakaspi-aci-jelentes-2018-majus-hu.pdf>

² Source: https://www.ksh.hu/stadat_files/lak/hu/lak0015.html

invest their savings in housing (HEGEDÜS – SOMOGYI – TELLER 2018). All of this resulted in the real estate market becoming one of the important areas for securing the capital surplus, and house prices began to rise sharply (PÓSFAL 2020).

Between 2015 and 2020, both new and used housing prices almost doubled, the rate of increase being the most drastic in the county seats and especially in the capital. In 2015, the average price of second-hand apartments was 11.6 million HUF nationally, and this figure had risen to 18 million HUF by 2020. The difference is even greater in the county seats: from 10.4 million HUF to 20.1 million HUF. In Budapest, the average price of used apartments increased from 17.4 million HUF to 35 million HUF (between the last quarter of 2017 and the last quarter of 2018, real estate prices in Budapest increased at the highest rate in the world)³. The price changes of newly built apartments also have a similar ratio: nationally it increased from 18.3 million to 31.5 million HUF; in the county seats, the price of newly built apartments increased from 15.1 million to 26.4 million HUF, and in Budapest from 21.1 million to 41.4 million HUF in 5 years.⁴

Perhaps the most striking figure is that since 2016, housing prices in Hungary have grown at the fastest rate in the entire European Union⁵. The nuances of the picture outlined here include the fact that during this period the average salary also rose significantly: in 2015, the average salary of full-time employees was 162.391 HUF, while in 2020 it was 260.144 HUF.⁶ However, this increase does not sufficiently compensate for the large increase in housing prices, especially in the county seats and Budapest. In addition, the comparison must be treated with reservations, as the methodology for calculating the real salary has changed since 2019, which limits the comparability with previous data. Furthermore, it is worth highlighting that these data do not reveal how much the average salary of people under 35 have changed.

5. HOUSING SITUATION - INTERNATIONAL COMPARISON, MECHANISMS OF THE FORMATION OF THE 'GENERATION RENT'

As I mentioned before, the housing problems of young people and the issue of the 'generation rent' are basically a function of the affordability of housing. Young people become renters primarily because it's not affordable to buy housing property due to high real estate prices, especially when entering as a first-time buyer. In the United Kingdom, where the examination of the 'generation rent' phenomenon goes back more than ten years, the roots of affordability problems can be traced back much further. Housing prices began to rise very quickly in the 2000s, but average wages, instead of the previous, very high rise, only rose at a much slower pace. It is illustrative that between 1983 and 1993 the price of an average

³ Source: Global Residential Cities Index 2018: <https://content.knightfrank.com/research/1026/documents/en/global-residential-cities-index-q4-2018-6289.pdf>

⁴ Source: Central Bureau for Statistics (KSH): Table 18.1.2.8. The Average Price of an Apartment by Region and Settlement Type [million forints] https://www.ksh.hu/stadat_files/lak/hu/lak0024.html

⁵ Source : <https://ec.europa.eu/eurostat/databrowser/view/tipsho40/default/table?lang=en>

⁶ Source: Central Bureau for Statistics (KSH): Table 20.1.1.63.: Real Income (1992-2022) https://www.ksh.hu/stadat_files/mun/hu/mun0191.html

house rose from £26,000 to £56,000 (115%); in the same period, the average (annual) wage also increased very significantly, from £8,528 to £17,784 (108%), but while the average house price rose to £12,500 (123%) by 2003, the average wage was only £21,124 (19 %)⁷.

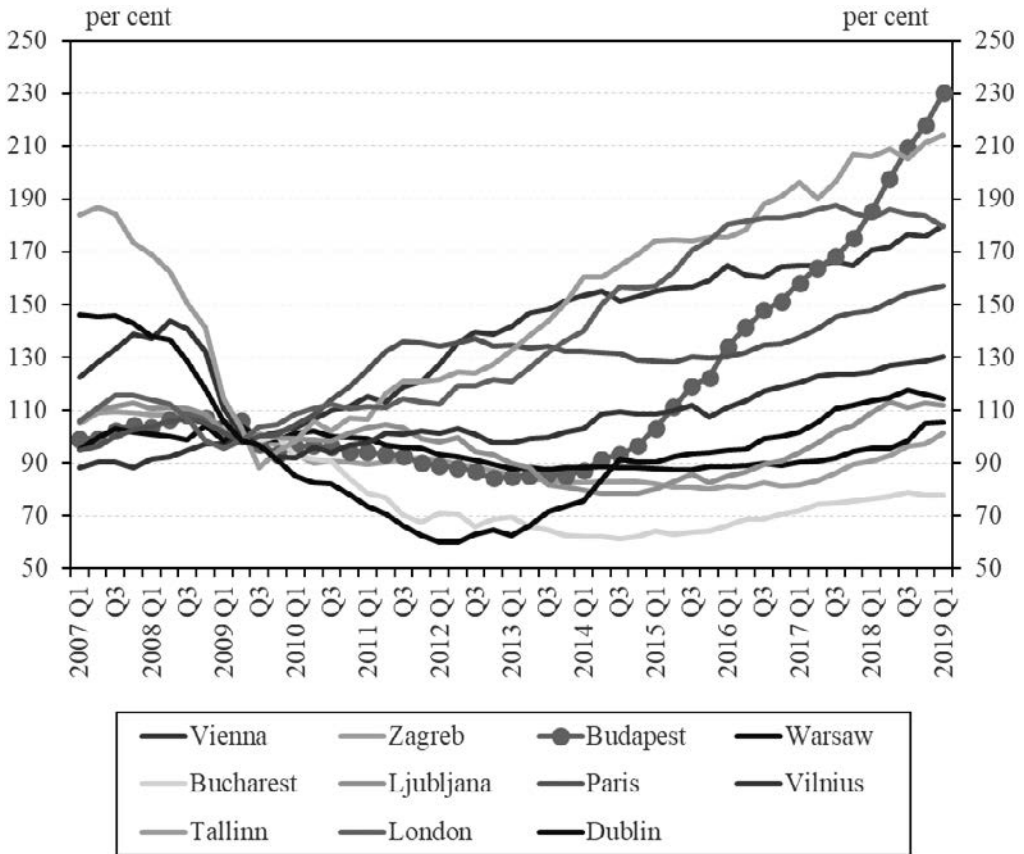
Since the tipping point in the 2000s – with the exception of a short period following the economic crisis in 2008 –, the average price of properties in the UK has been steadily rising. Although the rate of increase has decreased somewhat, compared to average wages, the increase in real estate prices is consistently higher. Discovering this trend is key to understanding the emergence of the 'generation rent', since the key to the problem lies in the problem of affordability, and when real estate prices rise significantly, without average wages being able to follow, a kind of 'affordability gap' develops, which prevents the expansion of the range of real estate owners. First-time buyers thus naturally find themselves in a problematic situation, due to which many of them have to look for other alternatives (BYRNE 2019; DEWILDE 2018).

In Hungary and the surrounding Central and Eastern European countries, 'generation rent' is a topic that has hardly been researched so far, and although it is a phenomenon that has only been researched for a little more than ten years in the United Kingdom, its history in these countries is much shorter than that. However, this is probably not primarily the result of lagging behind in scientific discourse, but rather the possible emergence of the phenomenon itself is much more recent. Therefore, I consider it important to present the evolution of housing affordability in Hungary in the period following the 2008 economic crisis, pointing out the critical points when the 'affordability gap' (BYRNE 2019) emerged. I consider it important to review all of this in a larger, European context (focusing on housing affordability in European capital cities), thus better understanding and illustrating the domestic changes, and showing to what extent they can be said to be unique or specific. To this end, in this section, based on the data contained in the Hungarian National Bank's *Housing Market Report* published in November, 2019. I will prepare a short European-level overview of the affordability of housing in Hungary and its changes.

Looking at the changes in nominal housing prices in European capitals, it can be seen that the growth of prices in Hungary can be considered outstanding. On the one hand, the average price of housing increased the most in the decade between 2009 and 2019 in Budapest (230%); on the other hand, in the period after 2014, the rate of increase became much steeper than in any other European capital (*Figure 1*). In this respect, Budapest differs from the capital of other countries geographically and economically close to our country; the increase in prices in Zagreb or Warsaw does not even come close to those in Budapest. It is worth pointing out that the prices in Budapest rose more than the prices in London (190%) in this decade. After Budapest, the second largest increase was in Tallinn, but this case cannot be compared to the situation in Budapest either. Since the price change took place quite differently, after a particularly high and sudden drop in prices, a less steep rise over a much longer period can be observed: the prices typical of the period before the economic crisis were exceeded by house prices only after 2016, and in 2019, compared to the prices in 2007, the increase is only about 27 percent.

⁷ Source: <https://www.avtrinity.com/news/house-prices-vs-income-how-affordable-are-uk-homes>

1. Figure⁸: Development of Nominal Housing Prices in European Capitals
(Average of 2009 = 100%)



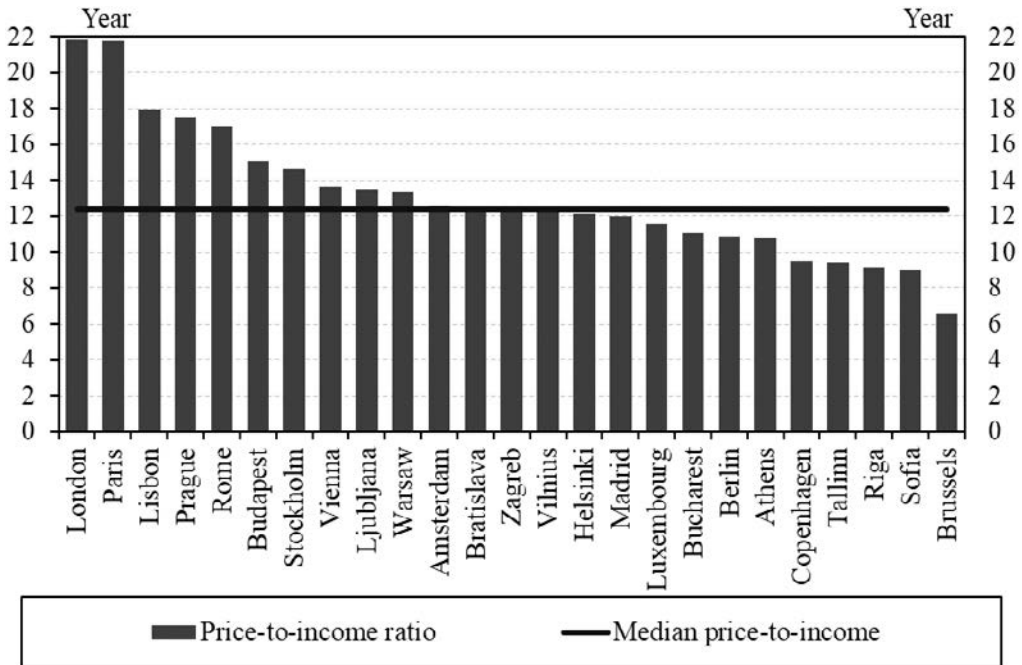
After the relative movements of house prices, it is worth examining the ratio of real estate prices to wages, since the affordability of housing can really be compared on an international level based on these kinds of statistics. It should be noted that it is impossible to make a perfect comparison even at the international level, since the various compared statistics are not calculated in a completely uniform way everywhere. The house price/income index refers to how many years of income, an average household can use to buy a property with a median price (Hungarian National Bank 2019)⁹. In Budapest, this was 15.1 years in 2019, making Budapest one of the European capitals with greater affordability problems, from the point of view of purchasing real estate (Figure 2). Compared to the Visegrád countries, it can be seen that the situation is the worst in Prague, where an average household needs 17.5 years of income to be able to buy a median-priced apartment. The affordability of real estate is better in Warsaw (13.4 years) and Bratislava (12.5 years) than in Budapest. The ratio of property prices to household income is the

⁸ Source: Hungarian National Bank (MNB). Housing Market Report 2019. November – Set of Figures. <https://www.mnb.hu/letoltes/laka-spiaci-jelente-s-2019-november-hu.pdf>

⁹ The ratio of income to real estate prices is the quotient of median real estate prices and one and a half times the average salary

worst in London (21.9 years) and Paris (21.8 years), however, in the majority of Western European capitals (including Vienna [13.7 years], which is worth highlighting due to its geographical proximity) the affordability of real estate is better than in Budapest.

2. Figure¹⁰: Housing Price/Income Index in European Capitals



6. THE MAIN MECHANISMS OF THE FORMATION OF 'GENERATION RENT'

An alternative to privately owned real estate is renting an apartment, so another important aspect of housing affordability in European cities is the examination of rental fees (DEWILDE 2018). The reason for the formation of the 'generation rent' is primarily related to the increase in real estate prices, however, from the point of view of the topic, the affordability of rental fees is equally important, since it is primarily related to the extent to which the phenomenon is problematic in the given society. Budapest apartment prices are also among the more expensive European capitals in terms of net income: in 2019, the rent for an average one-room apartment in Budapest was 46 percent of the average Hungarian income, and the rent for an average three-room apartment was 79 percent of the average salary (*Table 1*). Among the capitals of the Visegrád countries, housing affordability in relation to the average net income is slightly worse in Warsaw, and slightly better in Prague and Bratislava than in Budapest.

¹⁰ Source: Hungarian National Bank (MNB). Housing Market Report 2019. November – Set of Figures. <https://www.mnb.hu/letoltes/laka-spiaci-jelente-s-2019-november-hu.pdf>

In addition to all of this, there is another telling indicator that measures how much money is left over from the average salary after paying the rent for an average three-room apartment. This data shows that the situation in Budapest is worse than in the capitals of the Visegrád countries. After paying the rent for a three-room apartment in Budapest, €290 remained from the average wage in 2019, the same figure was €351 in Warsaw, €406 in Bratislava, and €452 in Prague. The worst situation is in the Portuguese capital, this possibility may be related to tourism and short-term apartments rented out to foreigners.

When examining the topic of the 'generation rent', it is illuminating that London is one of the least affordable capital cities in terms of buying and renting an apartment. Unlike other Western European countries, prices are not only increasing and getting higher, but are also considered high compared to wages. Paris is the other Western European city where the situation seems to be similar, but in terms of the amount of money left after paying the rent, the situation in London is apparently worse: instead of €299, after paying the sublet in Paris, €403 remain from the average wage. In addition, an important difference is that in France, like in Germany, the state applies regulation in the private rental sector, which maximizes rents in certain areas, including Paris, based on the regional median rent (KHOLODILIN et.al.2022).

These figures seem to be a convincing explanation for why the topic of the 'generation rent' first appeared in the sociological discourse in the United Kingdom. Looking at the Hungarian data, especially the Budapest data, it can be seen that in a European comparison, the country is also among the countries with the worst affordability, both in terms of buying a home and renting a home, although in both cases the affordability of housing in Budapest is slightly better than in London. If we examine the remaining amount after paying the rent for the average three-room apartment, in terms of purchasing power parity, the amount in Budapest is closest to the amount in London. In Budapest and London, respectively, €290 and €299 of disposable income remains after paying the rent (Hungarian National Bank 2019). So, in this respect, in 2019, Budapest's affordability problems in the private rental sector were already comparable to the situation in London.

1. Table¹¹: Rent/Income Ratio in European Capitals

	Rent-to-income (1 bedroom)	Rent-to-income (3 bedrooms)	Salary remaining after renting a 3 bedroom apartment (right-hand scale)
Lisbon	65,81	117,18	-186
London	51,57	86,52	299
Rome	47,84	82,91	243
Paris	37,65	80,41	403

¹¹ : Edited by the Author, based on: Hungarian National Bank (MNB). Housing Market Report 2019. November – Set of Figures. <https://www.mnb.hu/letoltes/laka-spiaci-jelente-s-2019-november-hu.pdf>

Warsaw	49,30	80,08	351
Budapest	46,03	78,72	290
Athens	42,00	76,10	228
Prague	47,63	74,92	452
Amsterdam	47,57	74,21	553
Bratislava	46,23	73,44	406
Bucharest	41,61	68,77	420
Sofia	38,79	68,46	469
Ljubljana	36,41	66,65	448
Madrid	41,13	65,96	606
Luxembourg	36,19	63,34	858
Vilnius	37,54	59,98	561
Vienna	33,13	59,88	664
Zagreb	37,24	58,76	573
Riga	34,27	58,18	482
Copenhagen	32,13	57,48	865
Helsinki	31,66	53,26	898
Berlin	28,90	52,65	1 009
Tallinn	30,71	51,82	730
Brussels	31,12	51,19	960
Stockholm	33,52	51,03	949

In conclusion, it can be said that domestic housing prices have risen at a uniquely high rate since the start of growth in 2014, making the situation exceptional even among the Visegrád countries. The 230% increase that can be measured in the decade between 2009 and 2019, can be said to be quite unique. Such a sudden and steep rise in house prices cannot usually be compensated by the rise in wages, so the affordability of buying a house deteriorates. In addition to the rise in prices, it is also important to emphasize how quickly the change took place, as the general forms of housing can not change in such a short time. The dominant form of housing in our country is still living in privately owned property, the majority of the population lives in their own apartments, the problem primarily affects only new entrants: first-time home buyers. In such countries, the rental sector is usually narrow, unregulated and difficult to afford, these are also typical of the Hungarian rental sector (CSIZMADY – KŐSZEGHY 2022). These problems primarily affect young people, since they are in a situation where they have to somehow solve their own housing, leaving their parents' house (KOC SIS 2023) and becoming either first-time buyers or renters.

The key to the emergence of the UK 'generation rent' was that wages could not keep up with the rise in property prices, so first-time buyers were pushed out of the home buying circle (Byrne 2019) and became renters. After that, the situation became problematic due to affordability problems in the private rental sector. It can be seen that the changes that have taken place in our country in the last short decade have created a very similar situation, with the difference that the change started much later and is taking place at a much faster pace. In addition to the poor affordability of home buying and the rental sector, there is another very important factor that is necessary for the creation of 'generation rent', and this is that the given country is characterized by a 'property owner society', which means that the dominant form of housing is living in privately owned real estate (RONALD 2007). This is important because, on the one hand, the private rental sector in such countries usually suffers from affordability problems, and on the other hand, because 'generation rent' can appear as a generation in a unique situation, a group separated from the previous generations. In countries where large groups of people live in rented property for a long time, the deterioration of housing affordability does not cause generational separation, the problem becomes more general and affects larger in this sense, more heterogeneous groups of the population than in countries where it is typical to live in one's own property.

SUMMARY

In the study, I tried to present the history of the development of the Hungarian 'generation rent' phenomenon. When examining the 'generation rent' phenomenon, it is essential to review the history of the phenomenon in the United Kingdom and the main moments necessary for its development. In this study, I argue that a situation similar to the one observed in the United Kingdom has recently developed in our country. The investigation of the 'generation rent' phenomenon is relatively new, even in the United Kingdom it appeared only about a decade ago, and in Hungary it has a much shorter history. However, this is not because the Hungarian scientific discourse is lagging behind in terms of the topic, rather it is related to the fact that the 'generation rent' phenomenon itself appeared much later. Despite the time difference, the phenomenon of 'generation rent' in Hungary developed much faster and the most important conditions were still able to develop similarly.

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The framework of large group identification: religion and nation¹



ABSTRACT

It is often the case that religious and national forms of self-definition are mutually reinforcing and intertwined (e.g. SMITH 1991, 2004; DANIEL – DURHAM 1997; FRIEDLAND 2001; HOPPENBROUWERS 2002; ANDERSON 2006, etc.). This process can occur in a variety of ways and contexts all over the world. In addition to attempts at defining religious and national identities, the following paper focuses primarily on three approaches: (1) how religious and national identification can be understood, (2) what is the relationship between religion and nationalist worldviews, what is the reason for this linkage, and (3) what is the mechanism and significance of the connection.

KEYWORDS

nationalism and religion, collective identity, sacred nation

DOI 10.14232/belv.2024.1.6

<https://doi.org/10.14232/belv.2024.1.6>

Cikkre való hivatkozás / How to cite this article:

Szilárdi Réka (2024): The framework of large group identification: religion and nation. *Belve-dere Meridionale* vol. 36. no. 1. pp 81–90.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

¹ This article was supported by the HUN-REN 'Convivence' Religious Pluralism Researchgroup

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It is often the case that religious and national forms of self-definition are mutually reinforcing and intertwined (e.g. SMITH 1991, 2004; DANIEL – DURHAM 1997; FRIEDLAND 2001; HOPPENBROUWERS 2002; ANDERSON 2006, etc.). This process can occur in a variety of ways and contexts. For example, the politically instrumentalised alliance between modern nationalism and orthodox Christianity, which historically builds on the Byzantine Empire's idea of *symphonia*, and which is extended by the power apparatus to an inalienable link to territorially expressed nationality, is well known (LEUSTEAN 2008; PUSZTAI 2009).

Another typical cross-sectional example is the resurgent nationalism of the non-Orthodox Central-Eastern European states after the fall of the Iron Curtain, in which not only Christian but also other religious elements are present (SZILÁRDI 2014, 2017).

Or, perhaps less thematised in Hungary, but another relevant example is the Indian nationalism linked to Hinduism, which emerged in the 19th century and codifies religious and national affiliation as the same, and which gained new emphasis with the rise of right-wing political actors in the wake of economic liberalisation in the 1990s (SZIVÁK 2017).

Both in a historical perspective and in a contemporary context, we can thus find several instances in which this alliance is established. The question of the role played by the parallel construction of national and religious identities can be answered in different ways by theories of religious and national self-definition and by the framework of historical considerations of religion and nationalism. Therefore, the paper focuses primarily on these three approaches: (1) how religious and national identification can be understood, (2) what is the relationship between religion and nationalist worldviews, what is the reason for this linkage, and (3) what is the mechanism and significance of the linkage.

RELIGIOUS IDENTIFICATION

Issues of the process of self-definition are most closely related to modernity, because in a social structure rooted in tradition, where the individual's psychic capacities and desires are largely congruent with his social potential, the question of identity seems to be uncontroversial. Prior to the emergence of modern societies, the predetermined 'identity programme' (PATAKI 1997) was regarded by most people as a necessary fact of life, and to deviate from it in premodern societies was to turn against the whole environment. In other words, where the number of models of identification and the quantity of limited roles were few, identity formation did not encounter substantial obstacles.

In contrast, in more complex and rapidly changing societies, there are an almost infinite number of behavioural and normative models, so the search for identity becomes a mass problem with the the modern age, when individual existence loses its basis in tradition and finds itself in a contradictory set of alternatives. As a consequence, in post-industrial societies, individuals and groups have to construct and defend their identities in increasingly complex ways,

as they have less and less opportunity to influence public life and as the institutions of public life are less and less concerned with providing a system of meaning. The search for identity and, moreover, its preservation, is becoming increasingly challenging, especially because of the constant tension between environmental expectations and personal preferences.

The process in which the structures of the tradition were shaken, the relative harmony between autointerpretation and heterointerpretation was disrupted, and the uncertainty that was palpable at the beginning of the century became a universal experience by the middle of the century (MÁTÉ-TÓTH 2012). In religious identification, these issues have been/are multiplied, and the fragmentation of identity elements, individualisation and religious pluralisation have led to a fundamental change in the types of religiosity in the last few decades (e.g. GLOCK, STARK 1965; BERGER, LUCKMANN 1975; SMART 1968 etc.)

In particular, it should be stressed that in this study the concept of religious identity is interpreted as a social construct, and not in any way as a given in the sense of known religious traditions or conceptions of religiosity. In this sense, and in simple terms, religious identity is defined when an individual defines him/herself in a spiritual dimension (beyond the physical world, vertical). This spiritual axis is the point of reference against which he measures his life, his actions, his ethics and his outlook on the world, and thus has an essential 'organising' power at both personal and group level. In the case of clear religious self-definition, the elements of the horizontal dimension are clearly subordinated to the vertical aspects, i.e. the different parts of identity are defined in relation to this. It means that there is a hierarchical organisation in which religious self-definition unifies the parts of self-identification.

However, as a consequence of postmodernity and the effects of secularisation, this property of dependency is not always the case, i.e. religious, occupational, political, etc. sub-identities are often juxtaposed and often lack solid structures. This plasticity is most noticeable in the case of private religiosity, since at the community level the characteristics of collective self-definition – constructed by the group – prevail, i.e. the „self-conception” resulting from the interaction of the individual and the community may be more resistant to change.

NATIONAL CONSCIOUSNESS

No less complex is the definition of national consciousness, the most obvious example of conscious social belonging, which owes its strength, among other things, to its own past events. The concept of nation is a relatively recent one; it was not spoken of before the 18th century, and as a phenomenon it is typically European, having become widespread throughout the world in the 19th and 20th centuries. Initially used to denote blood relationship (the original Latin word *nasco/nasci* means 'to be born'), by the 18th century the term was used to refer to the total population of a state. The meaning of the word gradually became intertwined with the concept of people or state, and this intermingling and interchangeability of meanings led to a confusion of meanings and terminology that can still be found in many places today (NAGY 1998).

The definition of the concept of nation is therefore as problematic as the approach to the general concept of religion. While Ernest Renan, for example, identifies a sense of common past and heritage and a desire for common unity as two factors of national community, Giddens

identifies the criterion of the nation in a unitary administrative system over the population of a given territory (HUTCHINSON – SMITH 1994). While Max Weber emphasises the aspiration to found a state as the main concept, Hobsbawm stresses the common past and the need for self-determination (WEBER 1967; HOBBSAWM 1992) These few examples only illustrate the complexity of the issue, but the common intersection of common culture, language and traditions, and the establishment and defence of a sovereign state, can be highlighted in the theoretical writings on nationhood.

There have been countless theoretical considerations of the emergence of the nation in the modern sense; the various approaches can be divided into three broad categories according to the ideas they consider about the birth of the nation.

The first set of theories consists of those that hold that the formation of the nation is the result of an organic, historical process and, as such, has a concrete (cultural entity) history over the past millennium(s).

In contrast, the modernist position sees the nation as a modern social construct, created by the dramatic changes in society that occurred with the advent of industrial society. The change can be captured in the way that the personal, kinship and informal relations of agrarian society are replaced by the multiplicity of impersonal relations characteristic of industrial society and the formal system of norms that regulates them. Theories stress that the qualities that define nations (such as tradition or religion) are the product of human thought. One of the main theorists of the concept, Ernst Gellner, argues that the elite plays the main role in the creation of the modern nation, with an interest in sharing culture with the strata over which it wishes to exercise power. In this sense, the concept of the nation has no antecedents in history.

On the whole, modernist theories claim that the emergence of the modern concept of the nation precedes the emergence of nations themselves, so nations cannot exist without nationalism. From this perspective, nations are the product of the emergence of nationalism and the nation-state. Such a notion is emphasised, for example, by Eric Hobsbawm, who accepts Gellner's assertion that the idea that the nation is a natural, God-given means of classifying humanity, with an innate political destiny, is nothing more than a myth. It is not the nation that creates nationalism, but the other way round. (GELLNER, quoted in HOBBSAWM 1992) Anderson, also in his modernist work *Imagined Communities* (2006), places 'print capitalism' (45) and the creation of literary language at a key position in the process of nation-building.

The literature shows dilemmas along these fractures, not only in terms of nation-building, but also in terms of national identity. Premodern theorists place the existence of national identity further back in time, and seek its formation in the loyalty of the individual. This loyalty links the individual, even unconsciously, primarily to groups that share similar cultural (linguistic, traditional, religious) characteristics (this presupposes the idea that common cultural characteristics already exist). This kind of identification, which is essentially unconscious and based on cultural elements, is the basis of ethnic identity. By contrast, national identity is already conscious of belonging to a group and seeks and finds means to exploit the cohesive force that this provides.

The modernist view, however, derives national identity from the emergence of nation-states, and while emphasising the common vision of the group, it does not consider the importance and continuity of traditions, rituals and symbols to be indispensable. It is precisely this problematic that has given rise to the ethnosymbolist school of theory, which in fact represents a compromise between premodern and modern theories.

The ethnosymbolist conception accepts that the difference between agrarian and industrial society is so radical that it has led to a radical change in the concept of the nation, but it also emphasises that the nation has antecedents. Anthony D. Smith identifies the formation, development and change of historical nations as unique, complex and heterogeneous processes, and identifies the antecedents of the nation in a chain of myths, symbols, memories and values passed down through generations. He calls this system of symbols the 'ethnic core', which includes the common name of the ethnic group, shared myths about its descent and origins, shared historical memories and common territory, elements of common culture, and a sense of solidarity (SMITH 2004).

In the context of the process of becoming a nation and the reference points of national identity, it is also worth devoting a few paragraphs to the concept of invented tradition (1983), as introduced by Eric Hobsbawm. Hobsbawm applies the notion of invented/constructed tradition to a set of formalised practices which, because of their ritual-symbolic nature, inculcate norms of behaviour through repetition, or which seek continuity with the past. Continuity in this interpretation is often illusory; rather, these traditions are adaptive responses to new situations that take the form of references to old situations (HOBBSAWM 1983).

Invented traditions reinforce (or create) group cohesion and in all cases use history as a means of legitimation. Their success always depends on the receptiveness of society. There can be different starting points as regards their origin: there are traditions invented by a single person (e.g. scouting), or introduced by an organisation/agency (e.g. Nazi symbolism), or there are cases where the tradition is only partly invented and in other cases spontaneously produced by social groups.

Hobsbawm traces the origin of the invention of traditions to rapid social change, where previous social patterns are destroyed, rendering old traditions inapplicable to the new system. The function of constructed traditions in a changing society is clearly to ensure social cohesion and self-identity (or separation from others) and to structure social relations. From a practical point of view, two forms of tradition-making are distinguished: the political form represents the variety of political and social movements organised within the state, while the social form is the product of informally organised groups.

Since, in Hobsbawm's argument, the emergence of modern nation-states was without precedent, much of the tradition is necessarily fictional. Such constructed traditions include, for example, celebrations or spectacular ceremonies organised from above, national anthems, national flags, but also the creation of semi-fictional or entirely fictional national mythologies. In this period, therefore, as the old forms of power disappeared, the new means of securing loyalty were new traditions, the construction of which was largely linked to state institutions and can therefore be seen as the result of a conscious process.

The question of invented tradition can ultimately be related to the theoretical contextualization of religion and nation in several ways, since in the intertwining, the topos of tradition-making in political form (in the form of the aforementioned elements such as the anthem, the national flag, national holidays or (quasi-)mythologies) are often emphasized, the national being imbued with the category of the *sacred*.

RELIGION AND NATIONALISM

In addition to the fact that national and religious identity is a typical example of large group identification, a brief discussion of the reflections on the multifaceted relationship between the two horizons thus deserves a special mention in several respects. The separate discussion is not only induced by the topic of the intertwining of national and religious identity per se, but also by the large number of references in the literature to the structural and substantive comparison of the two concepts.

Benedikt Anderson points out that the experience of belonging in the imagined community of the nation replaced the universal sense of a vanished religious brotherhood in the 18th century. In the process of the philosophical revival, religious thought was increasingly displaced from the interpretative framework of the new scientific-rationalist approach, and the concept of the explanatory principle of redemption faded. This inevitably produced new, more secular forms of continuity (ANDERSON 2006), but because of the profound structural similarity with religion, national identification was able to provide a sense of brotherhood, even in a community of people who did not know each other. In terms of the national-religious analogy, Smith outlines the basic religious topics on which national identity is built. In narratives that draw on essentially biblical patterns, images of the ‚chosen people‘, the ‚holy land‘, the ‚golden age‘ and the ‚sacrifice of the hero‘ provide the structural durability of national belonging, and although the biblical narrative does not provide a universal basis for nationalist patterns of organisation, it is the reason why the idea of nationalism can be derived from the European cultural context (HATOS 2005).

In terms of interconnectedness, Roger Friedland argues that religion shares in the order of the nation-state, and thus that contemporary nationalism is religious in character (FRIEDLAND 2001). HOPPENBROUWERS *Religious nationalism in a Transformation context* (2002) states that religion has become perhaps one of the most important markers of national identity. On the relationship between religion and nationalism, the author divides the different theories into two types: on the one hand, maximalist explanations of the relationship assume that there is a causal link between the two, as they conceive of religion as inherently striving for social monopoly. On the other hand, and in contrast, the minimalist explanation denies that this relationship is substantial. While the conclusion of the former school of thought is that churches use nationalism as a necessary means to achieve their ends, the latter view is that the link is entirely contingent, accidental, and that the interconnection is almost exclusively the result of some kind of nationalist manipulation.²

Perhaps more importantly, the paper argues that there are some striking similarities between religion and nationalism, not only in structure and function, but also in content. First of all (from this point onwards the author is speaking specifically about Christianity), from the beginning to the present day, Christianity has viewed nature and culture as sinful forms with a certain suspicion, and it is precisely at this point that the path of Christianity crosses that of nationalism. Nationalist ideology focuses on language, customs, culture, contrasts the survival or strength of the nation with other nations, or sanctions certain practices, customs and objects for the individual, and sets up criteria of national loyalty and creed that the individual is expected to adhere to. In

² Hoppenbrouwers clearly argues for a close link between religion and nationalism, and finds the explanatory principle of the minimalist movement weak, as it focuses only on describing a phenomenon and not on analysing it.

a similar way, the church is concerned about the path the believer chooses in order to reach the eternal beyond in safety, and also needs profane forms that make it ‚attractive‘, so that it takes on a somewhat mundane form and begins to emphasise elements such as indigenous culture, language and local customs or objects.

Moreover, nationalism and religion share several characteristics: in terms of social homogenisation (peace, order, unity), both claim to follow the example of their predecessors (saints, national heroes, possibly both). For both, social order is accessible through rites and mysticism. A further important similarity is that, because believers or members of the nation are considered equal, both religious and nationalist organisations advocate an egalitarian society, but at the same time their original conception of the world is paternalistic and hierarchical.

Both the churches and the nationalist movements mediate knowledge to the common man, while presenting themselves as the explicator, the holder and guardian of ultimate truth. This knowledge includes a religious or political variation of redemption/salvation and has a purely messianic or prophetic dimension.³

Hoppenbreuwers argues that faith and nation are structurally similar, both presupposing that they are determined by an internal force that is in opposition to some external force. The internal force needs an authentic, tradition-oriented interpretation from the revelation of the Church Fathers or indigenous culture. Both religion and nationalism thus provide a social and psychological guide and ideological motivation, thus uniting will, emotion and intellect in a holistic worldview and thus eliminating historical contingency.

It is not only the manner in which the interconnection is made, but also its intention that is of great importance. One of the advantages of linking nationalist ideology to religion is that it gives a certain transcendence to the origin and purpose of the nation and a divine origin to its representation. The most obvious way of doing this is the attempt to sacralise the nation, i.e. when the nationalist thought process endows transcendent qualities to places, times, persons and objects of honour closely associated with the nation. This same linkage on the part of religious organisations can be pragmatic (to gain support among the faithful or the powerful) or principled (the nation as a missionary vocation), or both.

Levente NAGY's study (1998), which argues that the ideology of nationalism can be treated as a secular or modern religion, provides further interesting insights into the similarities between religion and nationalism. The reasons for this are severalfold: first, nationalism as an ideology working for an ultimate goal has taken on a transcendent character, and second, the process of secularisation has created a vacuum in terms of the role of religion, and as a result this vacuum has been filled by the ‚masses‘ with nationalist ideas. Nagy characterises the people's turn to nationalism as religious in nature, and the role reversal has made it one of the main tasks of nationalist ideology to convince its adherents that its ideals will ensure a brighter national future, a more meaningful and happier life. While the focus of religion is transcendence, the focus of nationalism is self; in its homage to the nation, it invokes national traditions, historical events and persons rather than religious symbols, and treats them with religious reverence. Religious dogmas are replaced by nationalist dogmas, in which the drawing of the geographical and ethnic boundaries of a community, the belief and conviction in the naturalness of borders, the embrace

³ raises an interesting point in the author's study: he applies the metaphor of the Christian life journey to the discourse of national history in the dynamics of suffering, evil forces, liberation/liberation

of the past and the treatment of history as a political instrument, and the unconditional belief that the state is the natural and rightful property of a single nation, are paramount, and that only in this way can the nation achieve prosperity.

THE MECHANISM OF THE LINK BETWEEN RELIGION AND NATION – THE VIEWPOINT OF SOCIAL PSYCHOLOGY

The interconnection can be approached not only from a structural or substantive point of view, but also from a perspective of social psychology. On the one hand, man is a social being who lives in political orders, communities and groups, and group formation is a fundamental psychological endowment and an elementary behaviour, a fact that has been repeatedly demonstrated in psychology.

Issues of collective self-identity have been discussed in depth in social psychology, from how groups are formed through the minimal group paradigm (e.g. TAJFEL 1980), to nuanced approaches to intergroup relations (e.g. Within this, the importance of identification along the lines of the large group is also well known in the social science discourse, both in the social psychological context and in the sociological, anthropological and political science context (cf. SZILÁRDI 2017).

The thematisation of this is also very important because there are no other two verticals among the large group identification types that could involve such a large number of people who are unknown to each other in such a profound way. Moreover, precisely because of its social character, it needs this form of self-placement, not only along narrower micro-groups such as the family, but also along larger sets such as age, gender or even religious or national communities.

Overall, in contemporary academic discourse, the concept of social identity is understood as a multidimensional construct, saturated not only with cognitive but also with emotional content, rooted in the dual determinacy of identification along group values and of defining something against something. In other words, identification has to be understood not only as a turning towards values but also as a turning away from other values, in this sense it easily becomes a dichotomy (and this implies research on intergroup emotions).

Several theories on the mechanism of action of the merger can provide clues. It may be one of the starting points of a set of responses to secularisation, as FUCHS and CASE (1997) argue, whereby anti-modernist ideologies formulated in response to modernity and secularisation seek to justify the elimination of the possibility of the world by the salience and monochromaticity of the group itself, and to achieve this they need a strong control of group members and organisational symbols.

The socio-psychological significance of the interconnection between religious and national (ethnic) identity is that the stability of collective identification is particularly enhanced by the fact that religious „truths” can be underpinned from the national side and national belonging from the religious side, especially when the religious and national dimensions are intertwined with other subsystems (political, cultural, linguistic, etc.) in a complex and diffuse way. In other words, in this process, the various hybrid identity elements can be unified and the individual (and at the same time a large group of people) can remain homogeneous and congruent. This phenomenon can also be interpreted as a case of adaptation to the symptoms of a pluralistic society.

Overall, the why and how of the interconnection of religious and national self-definition is a rather complex issue. There are similarities not only in the content but also in the structure of the two systems of ideas, and historically, as religion begins to fade, identification with the nation grows, a kind of change of function takes place.

As secularisation and then (post)modern pluralism become more prevalent, individuals and groups are faced with increasingly complex challenges of self-definition and collective identification, and the two identifications may become intertwined. This coupling can be bidirectional and not without instrumentalisation of power. That is to say, the religious/church space may seek common ground in order to expand its own market, while on the other hand, political power may instrumentalise the religious power space in order to expand its own constituencies and legitimise its power.

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The impact of demographic changes on HR processes

A highlight on workplace learning, upskill and reskill in the context
of the future or work



ABSTRACT

Demography plays a fundamental role in shaping the landscape of human resources. The interdependent relationship between these two fields is observable in the workforce composition, labor market trends, talent management strategies and also on learning. Changes perceived in demographic changes are shaping and transforming human resources management. In an era marked by demographic shifts, technological advancements, and evolving work preferences, organizations are facing the need to understand and adapt to the changing demographics to effectively manage their human resources. This article explores how demography influences HR and offers insights into how organizations can navigate this dynamic landscape with a highlight on learning related processes. The aim is to contribute to human resources specialists as practitioners and academic experts to be able to observe the impact of demographic changes on human resources management. Observations are obtained in a global perspective.

KEYWORDS

demography, workforce, labormarket, workplacelearning, upskill, reskill

DOI 10.14232/belv.2024.1.7

<https://doi.org/10.14232/belv.2024.1.7>

Cikkre való hivatkozás / How to cite this article:

Dobre, Eleonora Casandra (2024): The impact of demographic changes on HR processes. A highlight on workplace learning, upskill and reskill in the context of the future or work. *Belve-dere Meridionale* vol. 36. no. 1. pp 91–101.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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1. METHODOLOGY

In the present paper, a semi-systematic approach was used, as fit for topics that have been conceptualized differently and studied by various groups of researchers within diverse disciplines. The analysis process aimed to obtain relevant information from a selected field that has progressed over time also observing how the topic has developed across research. As a method of analysis, a qualitative one was used, and however this type of review is usually followed by a qualitative analysis, in this case it was not applicable. The potential contribution of the paper is the ability to map a field of research, synthesize the state of knowledge, and create an agenda for further research.

Related to conducting it, the plan of selecting the articles was based on the principle to find both, academical and business – workplace related contents as well. Related to the business content category, the aim was to assess business reviews and publications, and those but academic papers too, to filter through the personal professional expertise, as a practitioner. Among the articles found, it was a finding itself that reports, and analysis do exist especially on behalf of consultancy companies. Aiming to highlight learning topics in both types of contents is abundant, but tackling the shift proposed in the hypothesis that L&D (learning and development) is going through a change of positioning, was more found in business articles. The selection of the articles was based on their core relevancy on the topic and moreover, on their potential contribution of bringing better, modern and actual practices on what means learning in the workplace these days. The structuring and writing of the paper aimed to offer a basis to analyze whether the idea that the transformation of learning at the workplace is at least a real one.

2. INTRODUCTION

Many companies do not realize that the demographic changes in the workforce require new Human Resource Management strategies. The obviously rising average age of employees may not seem to be worrisome, as long as there is no effect on day-to-day business. Still, the employees and their knowledge will leave the firms; on the other hand, the recruitment of a qualified workforce in the external labour market might be hampered by skill shortages in some regions (VERWORN – SCHWARZ – HERSTATT 2009). One of the most significant demographic shifts occurring in many parts of the world is the aging population. As people live longer and healthier lives, organizations are faced with a workforce that spans multiple generations. The traditional model of a predominantly young workforce is evolving into a multi-generational one, with Baby

Boomers, Generation X, Millennials, and Generation Z working side by side. Each generation brings its unique set of skills, values, and expectations to the table, making it crucial for HR professionals to tailor their strategies accordingly. Mobility also plays a significant role in shaping HR processes. The digital age has brought in a new era of work characterized by unprecedented flexibility and mobility. Digital nomads, individuals who work remotely while traveling and often rely on technology to connect with their employers, have emerged as a prominent symbol of this transformation. As the ranks of digital nomads grow, their impact on human resources is becoming increasingly significant.

3. THE DEMOGRAPHIC SHIFTS

„Demographic shifts are fundamentally altering the composition of the labor force, requiring human resource professionals to develop strategies that attract, engage, and retain a diverse and multi-generational workforce.” (CASCIO – BOUDREAU 2008.). These changes are experienced by companies in various ways. These shifts are driven by factors such as aging populations, changes in birth rates, increasing life expectancy, and the entry of new generations into the workforce. Some of the main areas where companies are being affected by these demographic changes are various.

Demographic shifts are driving a greater focus on diversity and inclusion in the workplace. Companies are recognizing the benefits of a diverse workforce, including improved creativity, decision-making, and innovation. HR departments are implementing policies and initiatives to foster diversity and create inclusive environments. Also demographic changes are not limited to one region or country. Globalization has made it easier for companies to tap into international talent pools. This requires HR to navigate the complexities of hiring and managing a global workforce, including understanding cultural differences and legal requirements in different countries.

As the workforce composition changes, so do employee benefit needs. Older employees may prioritize retirement benefits and healthcare, while younger workers may value student loan assistance and professional development opportunities. Companies must adjust their benefits packages to meet the diverse needs of their employees. With younger generations entering the workforce, there is a natural inclination toward technology adoption. Companies are leveraging this trend by integrating technology into their operations and HR processes, including recruitment, onboarding, and employee engagement.

Demographics significantly impact talent acquisition and retention strategies. For instance, in regions experiencing a labor shortage due to declining birth rates, competition for talent can be fierce. HR departments need to develop creative recruitment methods, tap into non-traditional labor pools, and establish enticing employee value propositions to attract the best talent. Furthermore, understanding generational differences is essential when crafting retention strategies. Baby Boomers may prioritize job security and retirement benefits, while Millennials may value work-life balance and professional development opportunities. A nuanced approach to employee engagement and benefits can help organizations retain a diverse workforce.

3.1. Managing multiple generations

Companies are now managing a workforce that spans multiple generations, including Baby Boomers, Generation X, Millennials, and Generation Z. „In today’s workplace, the multi-generational workforce is not merely a diversity concern but a strategic imperative. The interplay of Baby Boomers, Generation X, Millennials, and Generation Z brings a wealth of skills, experiences, and perspectives to organizations, offering a unique opportunity for innovation and collaboration.” (LAMB 2019. 7–24). Each generation brings its own set of values, work preferences, and expectations to the workplace. HR departments must adapt their strategies to accommodate these differences, ensuring that the work environment is inclusive and conducive to collaboration among generations. There is a need „to create a harmonious multigenerational workplace, organizations must implement flexible policies, provide continuous learning opportunities, and foster a culture of mentorship and knowledge sharing.” (PWC 2011).

3.2. The ageing workforce

Many regions are witnessing the aging of their workforce as Baby Boomers reach retirement age. This has implications for succession planning and knowledge transfer. Companies need to identify and develop younger talent to fill leadership roles and ensure that valuable institutional knowledge is not lost with the departure of experienced employees. The share of people aged 55 years or more in the total number of persons employed in the EU-27 increased from 12 % to 20 % between 2004 and 2019. In 2019, 48 % of all working men aged 65 years or more in the EU-27 were employed on a part-time basis compared with 60 % of women aged 65 years or more. Agriculture, forestry and fishing was the largest employer of people aged 65 years or more in the EU-27, employing 14.9 % of the workforce for this age group in 2019. Some older people face a balancing act between their work and family commitments, while financial considerations and health status often play a role when older people consider the optimal date for their retirement. Many of the EU Member States are increasing their state pension age, with the goal of keeping older people in the workforce for longer and thereby moderating the growth in the overall financial burden of state pensions. The success of such attempts depends, to some degree, on having an appropriate supply of jobs. This may partly help offset the impact of population ageing, while improving the financial well-being of some older people who might not otherwise have an adequate income for their retirement. (EUROSTAT 2020).

It seems that developed societies enter an unexpected slow-down in their economic dynamism that is, at least partly, related to ageing. They tend to become less dynamic and innovative, and more conservative and routine-prone than younger societies with youthful and expanding labour forces. That poses a number of problems, especially in the context of competitive globalization.

Finally, one should mention the sociocultural changes that accompany ageing. While it is fashionable to stress the advantages and benefits of ageing—declining criminality and violence, peaceful conservatism, etc.—the problems associated with those very tendencies should also be kept in mind. Ageing societies turn more conservative and more crime/violence fearing. This may reduce aggressive behavior, but also increases the irrational fear of crime—and makes pressures

for (inevitably expensive and often socially divisive) security measures, such as gated communities, harder to resist. Conservatism of age typically aids conservative parties, and spawns conservative policies that cement the status quo and reduce the pressures for early, costly, but necessary reforms. Yet such reforms are essential for effective social and political adjustment. (PAKULSKI 2016).

3.3. Remote and flexible work

Demography and remote/flexible work are interconnected in several ways, as demographic factors can influence the adoption and impact of remote and flexible work arrangements. As more women and older workers remain in or re-enter the workforce, there is a growing demand for flexible work arrangements. Companies are increasingly offering options such as remote work, part-time roles, and flexible hours to attract and retain these workers and also they may recognize the value of retaining experienced talent by offering such arrangements. Also different generations within the workforce have varying preferences regarding work arrangements. Millennials and Generation Z, for instance, often prioritize work-life balance and may seek remote or flexible work options. Understanding these generational preferences is crucial for organizations looking to attract and retain talent across age groups.

Demographic shifts related to urbanization and population density can impact commuting patterns too. High traffic congestion and long commutes in densely populated areas may motivate both employees and employers to explore remote work options as a means of reducing commuting-related stress and improving productivity.

Also due to demographic changes, such as declining birth rates in some regions, which can lead to labor shortages, companies may turn to remote work to tap into a broader talent pool, including individuals in other geographic areas or those who prefer remote employment. More than this, younger workers enter the workforce, they may drive the demand for technology-enabled flexible work options. Family and caregiving responsibilities can also impact, such employees with caregiving responsibilities may benefit from flexible schedules or remote work to better balance their work and personal lives. Some older workers may prefer to age in place, staying in their homes and communities as they get older. Remote work can support this preference, allowing older employees to continue working while avoiding the need for a lengthy commute or relocation.

Demography and remote/flexible work are closely linked because demographic factors, such as age, generation, family structure, and technology adoption, influence both the supply and demand for these work arrangements. Organizations that recognize and adapt to these demographic shifts can better tailor their remote and flexible work policies to meet the needs and preferences of their diverse workforce.

3.4. The shortage of skills

Some industries and regions are experiencing skill shortages due to demographic changes. For example, in fields like healthcare and technology, there may be a shortage of skilled workers,

leading to increased competition for talent. Companies are *forced* to invest in training and development programs to bridge these skill gaps and remain competitive. This is producing a growing recognition of the need for continuous learning and upskilling in today's fast-paced, knowledge-based economy. As a result, many companies are shifting from traditional, one-time training events to ongoing learning and development initiatives. This evolution often entails a more consistent allocation of resources to training throughout the year. Companies are placing a greater emphasis also on skills that are relevant to the future of work, such as digital literacy, data analytics, and soft skills like adaptability and creativity. Training budgets are being reallocated to prioritize these skills in response to evolving industry demands.

Not only in corporate strategies, but also at governmental level, for example at EU level, the Council in February 2021 outlined the following five strategic priorities for the period 2021-2030: improving quality, equity, inclusion and success for all in education and training; making lifelong learning and mobility a reality for all; enhancing competences and motivation in the education profession; reinforcing European higher education; and supporting the green and digital transitions in and through education and training. (EUROSTAT 2023). All these, both sided efforts are leading to a new systemic approach when it comes to learning in companies, as processes led by HR.

Learning at work can be a motivational factor for employees. However, the main direct factors of motivation are more linked to leadership and management style, organizational climate, way of work and the reward system, learning is gaining a new positioning amongst the top ones. Learning at work is more than a benefit, impacting many motivator factors and it is also one of the keys for many challenges in management of human resources (HR), including strategically planned upskill and reskill actions. In this review, the major focus was to search relevant literature on the topic of learning in business environments.. The filtering and choosing of articles were screened by two perspectives: the scientific perspective and second the practitioner's perspective of having experience in learning activities within the business environment and considering existing research content on it. I've chosen to assess articles from a scientific perspective implying a critical and analytical approach to understanding the content of the article, such, evaluating the quality and reliability of the research methods and data presented in the article, assessing the validity of the author's arguments, and considering the broader context and implications of the findings. The aim of approaching this exercise from a scientific perspective, was to develop a deeper understanding of the research and its implications, and to be able to make better decisions about how to apply the findings in work or practice. The conclusions obtained as per this endeavor was that offering learning in companies is not a benefit anymore, but a core business need and a basic need of employees.

L&D professionals have the opportunity but also need to handle the business request of creating cultures of permanent learning, due to more than motivational reasons, such as equitability but also for innovation driven reasons. (BENSON 2022). Analyzing the learning topic based on major HR processes, the relevance and need of it, offering learning seems not to be a perk anymore, but more a necessity expected by employees, future, or existing ones. As the entire process related to human resources within a company, starting with recruitment, it all starts with skills. Finding, growing, adding, enriching skills become the red line of the employee's life cycle within the company. The core relevance of learning is emphasized also from the leadership

and management perspective, as it is a core need to build skill of the teams, so as to inspire and co-create a continuous learning culture. (RUSSO 2020).

Balancing challenges of talent pool, considering global context, solving skill gaps in house, within the company by up- and reskilling programs is sometimes a necessity, or at least, it is triggered by real business needs. Same process, in a customized way can be applicable to grow seniority or even to handle internship programs. On the job training, such as an apprenticeship, will enable an employee to develop the key attributes needed to succeed in their place of work, putting what they learn straight into practice. Establishing a culture of learning within a company is essential to upskilling teams and giving the tools and skills to boost productivity and innovation within their roles. Companies that give their staff the latitude to learn job-specific skills—and the time to test and expand those learnings—see benefits like revenue growth, better talent acquisition and retention rates, and increased productivity. A recent global survey revealed that 77% of workers want to upskill, and they're hungry for a workplace culture that will support their learning journey. (PWC 2021a).

3.5. The impact of upskill and reskill

„Though upskilling and reskilling take employee learning and development into two different directions, both are great for helping talent grow.” Jason Wiggins, Business Advisor. Reskilling allows employees to gain new skills in a different direction from their current career path, exploring different areas of interest and broadening their skillsets. This might include lateral skills training across various departments or trying out a new job role that better fits the company. (PWC 2021b). Upskilling is more linear. It focuses on developing an employee's existing skills to progress in their current role. Upskilling means improving employees' existing skills to bridge the gaps in your business. Upskilling encompasses both hard skills and soft skills. Hard skills are job-specific skills (including technical skills) typically learned through training or education. Whereas soft skills refer to interpersonal traits and competencies such as problem-solving, teamwork, and communication. (KAIKHOSROSHVILI 2020).

Upskilling seems to be an important dimension of the strong cultures, and 72% of global business leaders believe that culture helps successful change initiatives happen. That includes upskilling. With more than a third of jobseekers willing to sacrifice salary for the chance to learn new skills, employers should focus their efforts on retaining their workers. Investing in solid upskilling programs that show that the business is betting on their people's future success—as well as their own—is a good place to start. Creating a skilled workforce that's well-rounded and cross-trained can help increase an organization's overall effectiveness. Fostering a culture of learning means adopting the attitude—from the top—that failures are learning opportunities that lead to breakthroughs and can increase your speed to insight and lead to innovation. Failing forward is about understanding that learning is a process and skills application isn't usually perfect out of the gate. Accepting mistakes as a cost of innovation also breeds transparency, trust and collaboration. (*Hopes and fears* 2021).

It is a collateral effect of the pandemic which has accelerated the pace of change in the way work gets done and the need for new skills to use evolving technology to work more efficiently.

Collaboration tools for remote work, and automation and artificial intelligence models that can perform manual tasks and process data quickly, are driving the need for personalized, in-depth training. And businesses are realizing it's easier—and more cost effective—to build their own bench of talent than it is to build a team through hiring. These upskilling efforts should meet employees where they are in terms of role, industry and knowledge base. (PWC 2021c).

Workers want to reskill:

- 40% of workers successfully improved their digital skills during the pandemic.
- 77% are ready to learn new skills or completely retrain.
- 74% see training as a matter of personal responsibility.
- 80% are confident they can adapt to new technologies entering their workplace, with a large majority of people in India (69%) and in South Africa (66%) saying they are very confident, but only 5% in Japan say they are very confident.
- 46% of people with postgraduate degrees say their employer gives them opportunities to improve their digital skills, but just 28% of people with school-leaver qualifications say the same. Industries like retail or transport, which are most at risk of disruption, score just 25% and 20% respectively; banking scores 42%. Younger people are twice as likely as older people to get opportunities to improve skills, and people in cities are 1.5 times as likely as people in towns. (PWC 2021a).

Before creating an upskilling strategy, a diagnostic phase is recommended to see what skills will be needed from the employee base down the road. The goal is to be proactive and stay ahead of industry's future demands to get an edge on your competitors. Would be desirable to make training and development opportunities readily available and affordable for everyone. Of course, there might be employees, the ones with high productivity and great morale, you'll want to focus on more. Second, would be needed to accommodate different learning styles. Third action is to empower employees to choose their path. A fourth one is to reward employees for their upskilling efforts. And finally, engaging employees in upskilling can be valuable. (ITA Group 2020).

Another approach in implementing upskilling and reskilling is considered by Sammi Pun. She presents the following actions: give admins more time back: in times like these, where it is needed that workforce to quickly onboard and enroll into new roles internally, take out as much of the admin work as possible. Automate your enrollment process for learners so they can hop in courses that will quickly get them suited up for their new job without a hassle. Second: share ideas. Collaborative learning is more important than ever now that we have fewer people. Sharing best practices are essential during times of layoffs, freezes, and furloughs because you only want to replicate success. Collaborative learning environments enable upskilling and reskilling that's seamless and intuitive to learners by allowing peers to educate each other. Third: embrace mobile learning: Remote learning isn't just for our kids right now. Mobile learning is a way to guarantee that the workforce remains engaged and armored with the tools they need, whether on the go or from home, to help your company continue to succeed (SAMMI 2021)

Having in mind a supposed gap of understanding of the positioning of learning topics in companies, many offering it only or mostly as a benefit, the research on literature offered insights on the contrary, in a slightly unexpected way. The articles preponderantly sustain the

more expanded value of it, beyond the business need, as a predictable and normal expectation on behalf of the candidate, employees. From the candidate's point of view, learning is seen as a differentiator, so a company having a learning map actually is part of the reputation and employer branding of the company. Also, the way of offering learning in companies is seen as a core engagement, satisfaction and retention criteria. The mapped literature searched on the topics of re- and upskill is large, complex and with direct utility in business cases within companies.

The focus many companies place on seeking young talent, which for a long time was believed to lead to greater innovation, agility, flexibility in the workplace and, to a greater extent, performance, is increasingly subject to question. Many companies have since shifted their focus. The focus on young employees has been replaced by the acknowledgment that a company is better positioned if it has a "healthy" balance between younger and older employees. As a consequence, companies will need to create an environment that provides the same opportunities to older as to younger employees.

Companies will now need to consider what changes they must introduce as the result of having a more diversified workforce, in terms of age or in terms of employment relationship. This requires a higher awareness of the needs of the different stakeholder groups and the competence to resolve potential conflicts through innovative solutions. In addition, companies need to consider the requirements imposed by nontraditional employment relationships. Nontraditional employment relationships are those that deviate from common practice (e.g., careers with fluctuating part-time schedules, lateral careers, employees joining the company later in their careers, phased-in retirement concepts, and contracts with interim project managers). As a first step, companies should review their HR strategies in light of the changed framework in terms of demographics, longer life expectancies, new working-time rules. Companies that see their opportunities in diversifying their workforce will offer an extended career in accordance with the new retirement ages. This will enable them to better cope with a high demand for qualified personnel, which may not be satisfied in the future solely by relying on the domestic labor market. Often the employment relationship during the two additional years prior to retirement will be structured differently from the rest of the earlier career. It is quite likely that employees may wish to begin with a phased-in retirement, such as part-time or project-based employment. For other companies (e.g., production, but also certain field service activities), an extended career may not be an option for either the company or the employee. Solutions should be explored that allow the employees to retire, from a financial perspective, at the current retirement age despite the decrease in pensions as a result of the "early" retirement. Employers also need to keep in mind that such employees will no longer be able to reap the benefits of being statutory senior part-time employees. Special attention should be given to the retirement age as defined in the company pension plan. The retirement age determines not only the date as of which a pension is paid, but also the amount of the pension, meaning company pensions can be used as a strategic HR tool to influence an employee's retirement behavior. Of course, age is an important element that can significantly impact pension costs and risks. As a consequence, many company pension plans exclude certain employee groups based on age-related criteria. This may now conflict with the new HR strategy that is designed for a more diversified workforce, including more senior employees. (DAY 2007).

4. RESULTS AND CONCLUSIONS

Demography and human resources are intertwined in a complex relationship that shapes the workforce of today and tomorrow. Organizations that understand and adapt to demographic shifts will be better equipped to attract, retain, and develop a diverse and talented workforce. By staying attuned to population trends and tailoring HR strategies accordingly, businesses can navigate the ever-changing landscape of human resources successfully. Demography isn't just about numbers; it's about the people who make up the workforce, and understanding them is the key to HR excellence in the modern era.

The results of the review revealed that the relevancy and actuality of the hypothesis, such that L&D's positioning is changing, not being only a benefit, but transforming into a motivational factor, one important in attracting talent, retention of it, being an element of engagement is sustained by analyzed articles.

Technology continues to rapidly change the way most organizations operate. In response, companies and their employees must consistently add to their technical knowledge and skill sets. As job requirements change and new skills are required, companies are forced to either find new talent or fill the gap through upskilling. Through upskilling, companies can save money by increasing the abilities of their current employees, instead of spending time and budget on hiring new workers. In addition, the current workforce is expecting more from their job than guaranteed pay and a comfortable workplace environment. Employees now anticipate perks such as paid holidays, affordable healthcare and professional training. By providing employees with upskill training opportunities, organizations can make workers feel that they are valued and have a dedicated future within the company. Additionally, companies that choose to upskill rather than fill skill gaps with outside talent save money and time by reducing the need for hiring, onboarding and training processes. (MORITZ 2022).

While businesses cannot protect every job, they have a responsibility to help their people remain employable. Businesses need to articulate and communicate the business case for upskilling (win-win scenarios) and make upskilling part of their firm's purpose. A way of making the "upskilling purpose" a new normal is the development of measurement systems where companies disclose upskilling performance along with profits, financial metrics and other corporate social responsibility metrics. The most pertinent type of upskilling will vary from business to business, but firms can adopt core upskilling principles and strategies. (PWC 2021c)

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**Subsidiarity and proportionality in
Public Works' administration:
from local, regional, and national
to inter-regional, cross-border/
transnational, Trans-European
Networks (TENTs) in Transylvania
belonging to Hungary (until 1918/20)
and to Romania (since 1918/1920)**



ABSTRACT

This study intends to identify those levels of public sphere at which the public choice seems to be optimal, according to the principles of subsidiarity and proportionality, and depending on the scale of public works investments and the historical period, legal context. 20th century Transylvania – with an area that could comprise in it twice the Belgium's and one whole Netherlands – being part consecutively of Austria-Hungary, Romania, Hungary (its Northern part) and again Romania (since 1947 People's Republic of Romania) is a good terrain to analyze in the long term the specificities of public administration, public-private investments and the efficiency of public works in different time periods on local, regional and country level, continuing with the comparison of cross-border, trans- and international level public works based on public procurement. The durability and warrant of final product as public goods are also an actual topic, mainly because most of these public goods and historic public buildings approach their lifetime limits and need urgent restoration, nowadays their renovation frequently being financed by the local and state authorities with funds from the European Union's Cohesion or Regional Development Funds. According

to a classic Romanian public law and accountability law principle (local-regional) cooperatives had certain facilities in being involved in implementing public works on (local-regional) level without breach in the general law of competition. Based on the local roots of any cooperative and their ideal functioning according to universal principles (democratic structure, delegation of votes, autonomy inside a network or a hierarchical structure with their own supervising and coordinating non-lucrative offices, together with proper financial centers), it was a general rule and many parts in the world it still works as such, except for the neo capitalist oriented former East-Central Europe, where all the preexisting cooperative structures were dismantled and there are no countervailing powers or checks and balances on this market of public works. The historical examples (in a comparative Romanian-Hungarian or Transylvanian Saxon) will surely help in understanding the logic of public procurement policies and investments, works and the efficiency of realizing/creating public goods.

KEYWORDS

public works, public administration, development programs, urbanization, rural development, public procurement, functionalism, infrastructure, railways, road and transport networks, airports, ports, international organizations, economic and financial crisis, rural and regional development, urbanization, International Labor Organization, League of Nations, European Union, East Central Europe, European integration, diplomacy, East-Central-Europe, customs union, federation, mutuality, cooperative movement, Green International, economic and financial crisis, resilience, cross-border infrastructure.

DOI 10.14232/belv.2024.1.8

<https://doi.org/10.14232/belv.2024.1.8>

Cikkre való hivatkozás / How to cite this article:

Hunyadi, Attila Gábor (2024): Subsidiarity and proportionality in Public Works' administration: from local, regional, and national to inter-regional, cross-border/transnational, Trans-European Networks (TENTs) in Transylvania belonging to Hungary (until 1918/20) and to Romania (since 1918/1920). *Belvedere Meridionale* vol. 36. no. 1. pp 102–130.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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Romania became member state of the European Union on January 1st, 2007. She benefited before the adhesion from the SAPARD and ISPA programs, while after accession she benefits already from the third 7 years long cycle of European public funding for different priorities included in the National Development Plan structured in structural chapters and axis. Most of the programs

are destined to the renovation of formerly built public goods, public buildings. Nevertheless, Romania still shows a low level of absorption, probably due to the over-bureaucratization and saturation of administration.¹ In the following I will present several ‘good’ examples of public investments that took place in earlier periods.

SPIRU HARET AND KUNO KLEBELSBERG, TWO MINISTERS OF THEIR NATIONS IN PARALLEL

Spiru Haret developed a whole network of schools in the Old Kingdom of Romania while he fervently promoted the integration of peasantry by institutors into the cooperative movement comprising of hundreds of people’s banks in the rural area. In this regard, he followed the French model of cooperative movement where the agricultural-rural credit was partially supported by the state in order to raise the resilience of peasantry against natural catastrophes or calamities such as the Peronospora or Phylloxera that destroyed the wine-producing sector in whole Europe, but a part of the producers survived through the cooperatives by adopting other opportunities, mainly dairy production processed and then sold collectively by their common venture, the cooperative. France was a paradigm for Romania in other parts of public and state life, too, including public works and everything relying on this topic.

The dense network of rural schools built on the basis of typical blueprints in Romania had its parallel in the capital of Hungary. Here, mayor István Bárczy coordinated a wide program of school-building having extremely good results in this economically-financially fast growing, territorially widening and demographically booming capital city. Almost in the same time, in several regions, not only towns, but also rural communes, the cooperative movement went hand in hand with the building of state or ecclesiastical (elementary or high) schools, sometimes the praying and teaching open space being connected in the so called “School-Churches”.² In other places different types of cooperatives were located together with the farmers’ circle, even the youth or women association or their library in a commonly built so called Népház (People’s House). Famous architects participated in planning these works of art. Among them Ede Wigand, Károly Kós, Dénes Györgyi. The strong interrelatedness between the educational institution and the cooperatives are based on the lifelong learning program rooted in the universal cooperative principles and the dual identity of cooperative and farmers’ circle membership: they were in the same time parents of schoolchildren, the accountant chief of the local cooperative in general it happened to be the institutor, while the pastor as a moral authority used to be the president. Thus, the people finally had a proper institution, not being subordinated by

¹ In this situation, multinational companies usually gain public procurements, and a series of little companies execute the works. Yet, this phenomenon generates on a side lack of local workforce, a push towards import of workforce, while on the other side millions of citizens work outside the borders of their native country, in the meantime Romania not being able to absorb many billions of European Funds, her administration being saturated or the cities being stuffed with public works and traffic jams caused by the simultaneous works in progress seemingly uncoordinated, public works resulting in city centers and boulevards being paved cyclically each 5-10 years, bicycle routes leading from nowhere to nowhere in the plain field, while remote areas still remain without any basic infrastructure, century old buildings (schools, hospitals, bridges, etc.) failing to arrive in time to be renewed before imploding catastrophically.

² KESERÜ (2018): 135.

any other higher political authority. In general, thus, the collectivity's chariot had its fourth wheel besides the church, the school and the mayor office, an open public space that functioned spontaneously on local level, but connected to a wider network called cooperative movement, adopting-adapting the universally accepted and practiced principles. These principles include democracy in decision-making, voting rights long before peasants were awarded this political right, the right to vote and to be voted and delegated in cooperative congresses at higher fora. Concern for community, LLL or education of members, building of school, buying parceling plots for the benefit of the members were also "best practice examples" frequently adopted by cooperatives in East-Central-European context, too, inspired by the Rochdale Cooperative statutes. Their functional cooperative practice proved to be more paradigmatic than the utopian cooperative projects of Robert Owen, as William King noticed incredibly early. We can observe thus a healthy drive of cooperators towards self-government, but in strong connection with other cells of their kins. Cultural, confessional, or national identification may have had a reinforcing power in this process of networking. As a result, coalitions were concluded amongst the cells belonging to the same community of 'ethical' or 'ethnic' (ideological) values.

After the collapse of Hungary at the end of WWI, extremely narrowed by the Trianon treaty frontiers, Kuno Klebelsberg, a former secretary of state, now as a Ministry for Culture implemented a whole program of rural and urban modernization, including the building of hundreds of schools in the middle of the Hungarian Plane (*puszta*) in the benefit of the peasant populace scattered in distant homesteads.

What the cooperative or the agrarian circle meant for the peasantry, originally and formerly the guild was for the urban craftsmanship: they usually built and defended, maintained a bastion of their medieval town. Later, in the second half of the 19th century, being transformed into craftsmen's unions, they succeeded collectively in building a proper headquarters or even a pension, a canteen for the elderly or widowed kins without any state-support (see the example of Kolozsvár, where they built both), had their own choir, casino and library to their own entertainment. For the second and third fast growing strata of the urban agglomeration, the workers and the clerks (blue- and white collars) a growing need of housing raised the question of town administration involvement in this.³ Vienna was a pioneer in this respect. Budapest followed this model by proposing a greener alternative to the Viennese model: the Wekerle-estate for workers and clerks was based on an architectural program inspired by the garden cities model.⁴ The main concept of the estate was enshrined in a law conceived by the later name-giving person, prime-minister Wekerle, who supported this idea of comfortable human-scale estates for clerks and workers as well, not separated or clustered according to classes, but living together in a garden city where each family should dispose of an own little garden.⁵ This model was extended in the whole country, where so-called clerk-estates raised from the ground already before WWI,

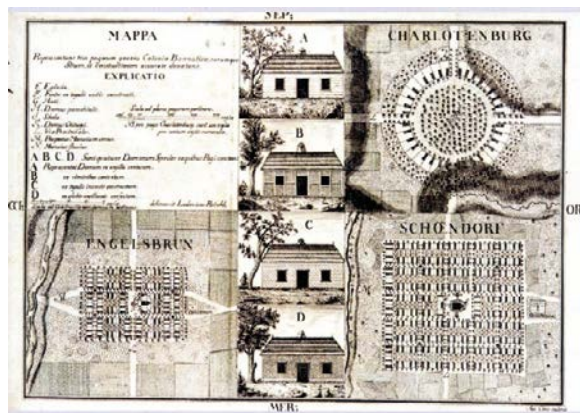
³ TAMÁSKA – KOCSIS 2018.

⁴ GALL 2002. 248–259.

⁵ In the ministerial justification of the law XXIX of 1908, Sándor Wekerle explained that the government's economic measures aimed to promote the universal interests of the nation and increase the well-being of the people. During the construction of the workers' and officials' colony, Sándor Wekerle implemented a new urban planning concept. His financial and urban development plan was based on the post-compromise recovery. The development of large-scale industry was revived, factories were established, and legal, educational, church, health, transport, public welfare, cultural, economic, financial and military institutions serving civil development began to operate.

but unfortunately their development halted due to the human losses of WWI. In the interwar period, huge companies, like the Renner/Dermata in Kolozsvár or the IRIS Porcelain Factory also ordered and constructed nice workers estates for their own employees.⁶ During WWII, family estates were built by the ONCSA (Fund for the Protection of People and Family) in the whole country, including Northern-Transylvania, each estate receiving a proper nursery or/and elementary school.⁷

In conclusion, I consider that these urban estates were rooted in the centuries old tradition of the Habsburg Empire including Hungary and Transylvania, as well as Bucovine since 1775, according to which formerly depopulated areas were repopulated by state authorities (e.g.) subsidized colonization, mainly in the Hungarian Bug Plane and the Banat. Here, geometrically almost perfect shapes (of circles, spider web or square grid) clustered the family house parcels among streets running in circle or radius or straightly or right angles, in the middle of the newly colonized village being built the church (1875/6), the school (1896) and the mayor office optionally with other community-oriented spot (a well, a common fountain, watering trough eventually).⁸



If we compare these Donauschwaben colonies' maps to the 20th century Wekerle and ONCSA estates, we observed that the same symmetrical forms shape the modern blue- and white-collar class' estate. The main concept was conceived by Károly Kós, a very young architect who was inspired as he avowed by the Grosser Ring (Greater Market Square) of Hermannstadt/Nagyszeben/Sibiu and the main square of Klausenburg/Kolozsvár/Cluj. Since all these public goods

⁶ GALL 2002. 308–310. The successor states, too, tried to follow this trend by colonizing workers and settling peasants in order to raise the proportion of the kin-nationals in those regions where the community belonging to the state's ethnic majority happened to be in numeric minority in cities or rural area traditionally populated by the former state's nationals (Hungarians, Germans in case of Transylvania or Banat).

⁷ GALL 2002. 419–420.

⁸ The most perfect example is Charlottenburg and Schöndorf. In this singular circle-shaped village colonized in 1771, the center was decorated with mulberry trees, the leaves being used for the raise of silkworms, the raw material being collected from peasants to be processed in the manufactures run by the Treasury in Temeswar or Arad. The self-sufficient village later became connected to the commuting railway-network densely surrounding Temeswar (the Radna-Temeswar wing deserving this village by the neighboring Beregszó station. All these are paradigmatic for the Wekerle-estate and other worker estates, too, together with the Ring- and Gürtel model developed in Vienna and adapted mainly by the Saxon towns in Transylvania and in Temeswar around the turn-of-the-centuries period.

were partially built by public administration as results of whether public works (in bigger, urban dwellings) or built in a public-private partnership, we may ask at what scale the public works are optimally organized? We can answer this with help of those notions that formerly belonged to the cooperative movement such as self-help help-to self-help as adverse/or collateral to state-help, equity and equality, solidarity, *subsidiarity* and *proportionality*, delegated powers together with the autonomy of the main grass-root-cells, their self-government, and their partnership with higher authorities. The cooperative approach to public goods realized that realized by different means: cooperatively or by public works and this takes us back to the creation of the ILO in 1919 and its programs.

SUBSIDIARITY AND PROPORTIONALITY

According to article 5 of the TEC and the TEU *subsidiarity* and *proportionality* are essential principles of the EU.⁹ My article intends to present those historical antecedents that were used and applied by the founding parents (not only fathers, but mothers, too) of the European Community as main principles and good practices leading to an “ever-closer union”, to the understanding and practicing of functional cooperation among member-states and candidate states, including their provinces and regions (whose representatives received place in the Committee of Regions founded according to the Maastricht Treaty in 1994). I observed that several principles and ethical values born and practiced inside the universal cooperative movement since 1844 were borrowed a century later by the statesmen and economists during the creation of the Council of Europe and the European Economic Community. Unfortunately, this process of borrowing was not as explicit as the borrowing of the main symbols of the Europeanness (flag, anthem, slogan, all three being borrowed by the CoE to the EEC), thus, as a consequence the new generation of politicians seem to be confused about the intrinsic core values and principles that should constitute the basis of grass root interactive democratic structure and functioning of the European institutions. Because of this lack of knowledge about the core principles such as *subsidiarity* and proportionality overwhelmed by other political panacea (national security and majority voting), the centralization of European Union goes together with the raise of euro-skepticism and as a defensive reaction against the Brussels bureaucratic super-power, the renaissance of narrow “state-sovereignism” and “economic nationalism”. A narrow-minded competition instead of functional cooperation among states and nations leads us all back to the interwar period mainstream international politics of “one for one, and all against all” style, which led the world to a rearmament, remilitarization course instead of disarmament and peace.

Returning to the evolution of European integration lasting for 75 years since the foundation of the CoE in 1949, we must acknowledge that the first 50 years seem to us more coherent than the remaining late 25 years. While the Maastricht TEU realized a three-pillar beautiful ancient Greek temple-like construction, the failure of the European Constitution resulted in substitute acts such as the Lisbon treaty. The latter is a juridical ‘ratatouille of articles’ crowding with

⁹ EUR-LEX. SUBSIDIARITY. The principle of **subsidiarity** is defined in Article 5(3) of the Treaty on European Union.

self-repetition, a treaty that even in its denomination, Consolidated Version of the Treaty on EU compared to the original Maastricht Treaty (TEU) not only seems an epigon, but besides confusing everybody by the doubled renumbering of main articles, it is crowded by un-understandable, unintelligible (unfinished) sentences or clone-, doubled sentences.¹⁰ The ratatouille style excelled in articles¹¹ that make reference to subsequent articles and to doubled numbers¹² or re-renumbered articles of the TEU¹³ and the TEC alternately, making even more confusing the whole ‘legal document’.¹⁴ Nevertheless, we emphasize that *subsidiarity* and *proportionality*, as well as *equity*, *mutuality* and *solidarity* together with *self-government* and *autonomy* were and still remain core principles and main values of the universal cooperative movement, too, but in the last 20-25 years these cooperative principles seem to be subdued by power politics and centralized decision-making monopolized by the decision-making triangle of the EU, especially the Commission, while the consultation of people and the role of peripheric organisms such as the Committee of Regions or the Economic and Social Committee as *consultative bodies* is being reduced to almost having no weight at all in decision-making.¹⁵ What is interesting is that even inside the cooperative movement, similar degradation of representative democracy is observed: the management and NCOs of huge cooperatives lead the cooperative enterprises without involving the members of the cooperative.¹⁶ Moreover, in East-Central Europe the Western Cooperative Companies behave just like any other multinational corporation having no incentive to include the producers or the consumers into the core membership despite the Mission Statements and Declaration of Principles that lasted more than 100 years (1895-1995) in the documents of the International Co-operative Alliance since its foundation. Therefore, the treaties are filled with plenty of oxymorons, paradoxes regarding the role of state and the interests of nations: “The Union shall respect the *equality of Member States* before the Treaties as well as *their national identities*, inherent in their fundamental structures, political and constitutional, inclusive of regional and local self-government. It *shall respect their essential State functions*, including ensuring the *territorial integrity of the State*, maintaining *law and order*, and *safeguarding national security*. National security remains the sole responsibility of each Member State. (Article 4)”. We see thus that national security overwhelmed the process of decentralization, including the self-governance of regions or regional ethnic communities having a long history of traditions and autonomous self-government. While the process of devolution started in the UK since 1997 encouraged the reappraisal of regions and regional stateless nations, the sabotage of Scottish referendum in 2014 and the violent repression against the Catalan referendum in 2017 by the Spanish government discouraged the self-determination

¹⁰ See for doubled sentences in Article 5 (former article 5 TEC *sic!*): Article 5 (ex Article 5 TEC) OJ EU C 115/18. 9.5.2008.

¹¹ OJ EU C 115/18. 9.5.2008. Article 4. 1.

¹² OJ EU C 115/18. 9.5.2008. Article 2 followed by Article 3 (ex Article 2 TEU). Ibidem.

¹³ OJ EU C 115/18. 9.5.2008. Article 3 (ex Article 2 TEU) compared to Article 5 (ex Article 5 TEC) that seems a vitiated reference to TEC instead of TEU. Ibidem.

¹⁴ As the first footnote of the CVTEU emphasized, the renumbering was made in a kind of random style, inconsequently to the table and to the juridical rigor: “These references are merely indicative. For more ample information, please refer to the tables of equivalences between the old and the new numbering of the Treaties.” OJ EU C 115/18. 9.5.2008. Ibidem.

¹⁵ Two protocols annexed to the Treaty of Lisbon (2007).

¹⁶ US SDA.

movements. Again, a midway remained open for Catalans, Basques, Scottish nation: fulfilling their large autonomous status with optimal strength, exercising self-government inside a larger state without heading for secession. The lack of general European national minority protection legislation (nevertheless the main core values contain the protection of minorities in general, not only the national or ethnic minorities) resulted in a civic legislative proposal-action led by the FUEN, but refused by the Commission, to enforce a Commission proposal towards the decision-making organisms: the Council of Ministers and the Parliament in this regard; finally, the case was taken in front of the European Court of Justice still waiting for a final decision. Thus, both the historical regions and the historical national minorities remain in this legislative trap: not recognized and not represented as such at any level. Thus, the member states as nation-states may oversee them, just like at European level, the Commission is forced only by law to consider the subsidiarity and proportionality principles, but that only in case on national parliaments of member-states, other lower organs not being asked, nor consulted, except the Committee of Regions. Administrative frontiers thus overcut genuine ethno-national communities, like for instance the Basques, ethno-cultural national communities not represented or listened to at any level of the European or member-state level decision-making forum.

Concerning the relationship between member-states and the EU, in its original and consolidated form of the merged¹⁷ TEC and TEU, Article 6 enshrined (contained) the main core principles: “Art. 6. paragraph 1. “The Union is founded on the principles of liberty, democracy, respect for human rights and fundamental freedoms, and the rule of law, principles which are common to the Member States.” together with art. 6. paragr. 2., while art. 6. paragr. 3. declared that “the *Union shall respect the national identities* of its Member States”. In the eventual breach of principles mentioned in Article 6(1), a clear political and juridical procedure was previewed by article 7 (amended but not renumbered by the Treaty of Nice) in 6 clear-cut paragraphs. Compared to this clear jurisprudence, the so-called ‘Lisbon treaty’ is more elusive and confusing, mainly because of the inconsistent renumbering and reformulation of articles taken from the TEC and the TEU.

Concerning its functional toolboxes, the fourth paragraph of the same 6th article resumed that “the Union shall provide itself with the means necessary to attain its objectives and carry through its policies”, while the functional realization of its objectives the Union should take into account the principles of subsidiarity and proportionality, thus, in this process local, county and regional authorities should have a salient role as well, not only in decision making, but also in implementation.

This article identifies those good practices or best practices that were observable in the field of materialized functional economic policies, mainly in Public Administration and Public Works that can be considered functional at different subsidiary levels: local, regional and national, later interregional and transnational (connecting two countries at least, like Austria-Hungary and Romania since 1873/1897 via Predeal-Sinaia or Gyimes-pass by railway), even trans-European and trans-Atlantic, even trans- and intercontinental (connecting Europe with Africa and Asia as conceived by the LON (League of Nations) and ILO (International Labour Office), planned and implemented in case of the E60 transcontinental road)¹⁸.

¹⁷ CVTEU 2002.

¹⁸ HUNYADI 2022.

‘FUNCTIONALISM AT WORK’: PUBLIC ADMINISTRATION AND PUBLIC WORKS

According to the basic principles of the 21st century cohesion programs, ecological problems can only be effectively and efficiently solved through cross-border interregional and interstate cooperation, and by connecting the transport and energy networks. However, as Jean Monnet and David Mitrany formulated, “We are not forming coalitions of states, we are uniting men”, these programs and projects do not want to create any political coalitions of states, but very pragmatically, starting with city development, urbanization and rural development, they solve everyday problems. Based on the plans of Public Works Committees they entrusted these programs’ implementation to sane brains, and they aimed for ordinary benefits and palpable results. To quote again Mitrany: “A question which might properly be asked at the outset in considering the fitness of that method for international purposes is this: *Could such functions be organized internationally without a comprehensive political framework? Let it be said, first, that the functional method as such is neither incompatible with a general constitutional framework nor precludes its coming into being. It only follows Burke’s warning to the sheriffs of Bristol that ‘government is a practical thing’ and that one should beware of elaborating constitutional forms “for the gratification of visionaries.” In national states and federations, the functional development is going ahead without much regard to, and sometimes in spite of, the old constitutional divisions*”.¹⁹

The custodian of functionalism therefore emphasizes that, just as the states in the USA, so the states in Europe can participate in one sector and one concrete-pragmatic public works program and investment, without forming a political alliance or federation. Moreover, this pragmatic-functional cooperation does not necessarily result in the creation of a *political entity*. Therefore, in the case of the League of Nations, he considers it a mistake to seek a solution based on border changes (revisionism): “*If the evil of conflict and war springs from the division of the world into detached and competing political units, will it be exorcised simply by changing or reducing the lines of division? Any political reorganization into separate units must sooner or later produce the same effects; any international system that is to usher in a new world must produce the opposite effect of subduing political division. As far as one can see, there are only two ways of achieving that end. One would be through a world state which would wipe out political divisions forcibly; the other is the way discussed in these pages, which would rather overlay political divisions with a spreading web of international activities and agencies, in which and through which the interests and life of all the nations would be gradually integrated. That is the fundamental change to which any effective international system must aspire and contribute: to make international government coextensive with international activities.*”²⁰ Under international activities and programs, he meant transnational programs for public welfare, such as *public works* programs and projects that can be implemented through *public procurement and public investment*, and projects that generate public enthusiasm and create job-opportunities. All other

¹⁹ MITRANY 1943

²⁰ “Viewed in this light, the Covenant of the League is seen to have continued that nineteenth-century tradition. It was concerned above all with fixing in a definite way the formal relationship of the member states and in a measure also of non-members, and only in a very secondary way with initiating positive common activities and action. The great expectation, security was a vital action, but a negative one; its end was not to promote the active regular life of the peoples but only to protect it against being disturbed.” MITRANY 1943. 97.

programs flirting with political-diplomatic and ‘horribile dictu’ with federation, on the other hand, ended up like a straw flame, as they lacked pragmatic foundations and a functional approach and went completely against the mainstream isolationist nationalist-statist fashion. Actually, not even the pacifist and pan-European organizations aiming at intellectual cooperation have survived from that era, with the exception of one or two academic-university institutions (e.g. the Jules Rampard Institute of International Relations established by the Carnegie Foundation in Geneva).

Founded in 1919 as an autonomous organization of the League of Nations (hereinafter LoN or League), the International Labor Organization (hereinafter ILO) is one of the few international organizations still operating today that survived the League of Nations in addition to the Rome-based FAO, the International Red Cross and Red Crescent, which merged in 1919, and the Inter-Parliamentary Union (1888) or even the International Cooperative Alliance founded in 1895. Other professional international organizations, e.g. the International Postal Union has also existed since then, but it is not a universal, but rather a professional organization). All of these continue to operate under the auspices of the UN, which was founded in 1945, or as associated category A or B consulting organizations, maintaining their headquarters in Geneva for a long time. The ILO became an advisory body and specialized agency of the United Nations upon the dissolution of the League of Nations in 1946. The ILO not only gained importance in the promotion of workers’ rights and social emancipation, but also played a prominent role in solving the effects of the economic crisis; it came up with the introduction, financing, and coordination of transcontinental, transnational infrastructural development programs to deal with the financial crisis.²¹

The ILO developed and implemented a trans-European public procurement investment that created an infrastructure that is still used and useful in the 21st century.²² The E60 road leading from London to Istanbul and the network of its branches, as well as the modernized Central European railway infrastructure, were realized public works investments that were planned, coordinated and implemented by the ILO together with the state administration and transnational companies in the 1930s.²³ No one could and was not able to formulate an idea similar to this project, neither in scope nor in execution. All the Pan-European drafts and the proposals of the Central European Economic Conferences initiated by Julius Meinl and Elemér Hantos (Mitteleuropäische Wirtschaftstagung)²⁴ remained, without exception, at the rhetorical level, nothing of these lofty plans has been realized apart from printing them on paper or debated on international venues, congresses, and conferences.

As defined by the founding fathers and its theorists: functionalism excelled according and thanked to David Mitrany and Jean Monnet, mainly in the interwar and the post-war period, under the aegis of those supranational organizations that existed that time, starting mainly under the aegis of the International Labor Organization and its Office (abbreviated as ILO). Two personalities, in fact the most famous functionalist thinkers, Jean Monnet and Mitrany were very close to these commissions. Monnet – as few know about it – was at that time Deputy

²¹ MACARTNEY 1925

²² BADENOCH – FICKERS 2010. 47-77.

²³ SCHIPPER 2009.

²⁴ GODEFROY 2018.

Secretary-General of the League of Nations during the Eric Drummond era (between 1919 and 1924) during the first half of the Drummond-decade/ Together with David Mitrany, professor of economics of Romanian origin at the London School of Economics, they were present at the founding of the now forgotten institutions within the League of Nations. Besides these two short-lived commissions, a Pleiades of international organizations founded in Geneva well before the Versailles Treaty system worked together with the post-Versailles period organizations, which all together can be considered the predecessors of the international organizations and European institutions. In a narrower European and East-Central European teleology, a crisis-resilience and redressement think tank was also founded under the name of C.E.U.E. This commission was created inside the League of Nations based on the General Assembly decision on the proposal of the French Foreign Minister, Aristide Briand, under the name of Commission d'Étude pour l'Union Européenne. This *Study Commission for the European Union* held its first meeting with 27 member-state delegates in 1930.²⁵ Later it constituted even an East-Central European section (Committee) next year under the name: Comité Permanente d'Études Économiques des États de l'Europe Centrale et Orientale (abbreviated: CPEEECO) that functioned also since 1931. These international organizations, committees bore not only in their name the "European Union" syntagm, but also the main ideas and principles that would be reborn two decades later in the form of ECSC and EEC during the fifties. Based on their lifework and their theoretic writings and practice, we can reevaluate the importance of these early commissions. Probably their ineffectiveness stimulated both thinkers and practitioners, Mitrany and Monnet to be more severe regarding political delegates and deputies of the member-states in the early period of the Coal and Steel Community when they decided that a High Authority should be independent of any and above all national government. The former inefficiencies of the League organisms compared to the more functional ILO may have influenced them in this seemingly illuminated absolutist centralizing direction.

Public administration and public works based on public procurements are based on long traditions in each country, yet the transnational functional projects remain less known in historiography. Nevertheless, the main public works also remained in shadow until recently in public knowledge, mainly because of revendicative public policies of successor states oriented towards contesting and concurring the realization of former multinational empires, denigrated as "prison of people" in case of Austria-Hungary (by Benes during WWI). Yet, if we measure the weight of public works and their effectiveness, we can assert that Austria-Hungary had a very efficient public administration and public services reached almost every remote area proportionally to the microregion's importance for economy or society, of course. As the central-European analytics proved, the Saint Germain and the Trianon treaties broke up a large, centripetally organized economic union into small, amputated parts reunited with other parts of the successor states (Czechoslovakia, Romania, Yugoslavia) that were not able to integrate these areas in the short two decades of the interwar period. Of course, each of the successor states made efforts in this direction, but given the almost holistically organized system they inherited from the former Monarchy, including its legal system, the Judicial Institutions, the Hospitals and Clinics, education and transport-communication networks, the capitals and governments of the successor states put

²⁵ CEUE 1930.

emphasis on elevating the other, more remote parts of their states, in the same time period channeling their population's surplus towards this ethnically different, but economically more prosperous new provinces, at least in case of Romania.²⁶ Nevertheless, Romania had also a strong tradition of public works, mainly under the reign of Carol the First, the country's first king, originated from Sigmaringen from the House of Hohenzollern, who brought during his royalty architects and engineers from all over Europe to build a modern state. The Romanian Kingdom had good economic and financial, but also cultural-intellectual, research and university relations with her neighbors, mainly Austria-Hungary, Germany, Belgium, France and the British Empire, since the successor of the King had an English born wife, the later Queen Mary, while the intelligentsia studied at universities mainly in France, Germany and Austria-Hungary. Just like Russia, Romania had a very modernist elite who followed the Western paradigms in each field of public life, including public works and administration.

In the following I will present some representative examples of public works and several private-public investments that were based on public procurement at different levels: local, regional, national, or international with study-cases taken from Romania or her provinces that belonged prior to WWI to Austria-Hungary including programs run by ethno-national communities or ecclesiastical institutions autonomously without state-help or state-support. Nevertheless, a benevolent self-taxation could help these projects: whether the banks and cooperatives contributed with 1 or 2 percent of their profits to a common fund sustaining a common Economic-financial review and another 1 percent to sustain the cultural literary association, whether the Israelite communities contributed with their not only symbolic 'shekel' to sustain national programs. Some of them contributed to local rural development or urbanization, others to the development of road or railway infrastructure, a few of them to interregional or cross border/transnational infrastructure.²⁷

Public works categories include at ascending level of territorial scope:

- at local level:

- rural development: homestead, farm colonies, schools, infrastructure, people's house, cooperative headquarters, Social and public services cooperatives²⁸

- urban development investment: green belts, green areas, parks, public lighting, gas plant, sewer and drinking water network channel, street paving, asphaltting, hydropower plants, water towers, public transport, public kitchen, people's house, garden cities, suburbs, Boulevards (kőrutak, sugárutak, Ringe und Gürtel), estates for workers or clerks (Tisztviselő- és munkástelepek): Kőváry estate in Kolozsvár/Cluj, Wekerle-estate in Kispest, Budapest, Hangya and FAKSZ colonies, later, since 1940/41 ONCSA estates, colonies,

- at local village level: from the point of view of private-public investment we can talk here about two important investments: (ecclesiastic or state) elementary schools and polyvalent People's houses.

²⁶ LIVEZEANU 1995.

²⁷ HUNYADI 2019. The trans-European networks also had their antecedents in the interwar period, and were destined to reach intercontinental (African, Asian regions) scopes, too, but WWII inhibited and halted that outreach.

²⁸ DÜLFER 1994. 750-754. In the USA there are 11,000 Social and Public Services cooperatives which represent the biggest co-op sector in terms of number of firms. Financial Services rank second, followed by Utilities, and Commercial Sales and Marketing.

The church community mainly built elementary schools out of their own resources and a large building inscription was painted on the front of the new building advertising that for example the Lutheran-evangelic church built and sustained this institution (Evangelische Volksschule, Ev. Elemi Népiskola). In other cases, the state also constructed and sustained elementary schools in villages, communes, in this case a simple inscription being on the frontside of the building: Állami (Elemi) Népiskola. In Transylvania, usually, the school was built immediately in the neighborhood of the church (see the case in Holdvilág, Kerc, Kisdisznód, Vermes).

The People's houses were used as headquarters of the dairy, consumer and credit cooperatives in the same time, in different rooms, sometimes giving place also for a service flat in favor of a clerk family; these buildings also housed the youth association or other ecclesiastical society, having a library-shelf as well, but more and more often a stage was also built in a larger hall as a place for community events. Several People's Houses were projected and built between 1907–1914 in Transylvania, mainly in Hungarian and Saxon villages (by architects Ede Wigand and Fritz Balthes). Sometimes the Agricultural Ministry subventioned 10-20% of the building costs, but the main part was funded together by the local associations, cooperatives, coownership, the common (közbirtokosság), and the ecclesiastical community.

- at town/municipality and/or county level: town hall or/and county hall, bridges, roads: macadam, asphaltting of streets, roads. In several towns the Vienna and Budapest development model became paradigmatic for their own development.²⁹

- at regional level: commuter railway, local interest railways (around Arad, Temeswar), mining colony with public services (see the Zsil/Jil-valley mining zone in Austria-Hungary, then after WWI becoming part of Romania)

- at national level: road and railway network, airport network, artefacts: bridges, tunnels, viaducts, fluvial and maritime ports, Danube-bridges (several were built by the state during the thirties in Romania).

- transnational level: state border crossing points, crossborder transport infrastructure, customs house (I give examples of crossborder railway connection plans and motorway/public road customs service offices planned along the E60 road)

- at interregional level: Trans-Pyrenées, Trans-Alpine tunnels, railways, cross border bridges and river channels, especially after former connections were dismantled by force of Trianon Treaty (bridges across the Maros-Mureş River in the Banat, railway downsizing between Belgrad and Budapest, formerly, before the Trianon treaty in function)

I believe that this transcontinental project³⁰ can be paradigmatic in its quality and transnational scope even today when the EU Cohesion Fund finances the construction of trans-European (TEN-T) transport channels. This early historical good example of mutual consultation and coordination between the development programs of neighboring states should also be emphasized, as some Eastern European neighboring states find it difficult to coordinate the rhythm of their large infrastructural developments even in the 21st century, agreements seem to be very difficult in the case of cross-border rail or road routes. The Great Depression of 1929 had many causes and consequences, which will not be detailed here. Among the constructive legal remedies, however, the states and international institutions introduced to mitigate and deal with the

²⁹ See more on Transylvanian urban development and public works here: FAZAKAS – FERENCZI – FODOR – GÁL 2021.

³⁰ LONAG COL 167. VALSINGER.

devastation of the financial and economic crisis have very rarely been the center of attention in economic historiography.

- at transcontinental level: Trans-Siberian railway, Trans-American road and railway network, E60, under the auspices of the LoN, financed after public procurement and implemented by different companies from Europe, TEN-Ts³¹

- at intercontinental level: E60 projected via Istanbul to Cape Town and Bombay but unfinished because of WWII

If we look at the mainstream of American tourism prior to WWI, we can observe that the most Eastern destination in Europe's tourism were the cities of Budapest, Sankt Petersburg, and Moscow. In the interwar period this may have changed but not too much, in favour of Romania and Yugoslavia instead of Soviet Russia. This change is proven by the direction of the E60 via Oradea, Cluj, Bucharest to Constanța, continued the sea towards Istanbul. These trends were halted by WWII and restarted lately, only after the reconstruction of Western economies with the help of the Marshall Fund coordinated by the OEEC, mainly by connecting the traditional tourist-frequented region of Europe: the Alpine region via the railway and public transport tunnels and road networks, finally by the Channel-Tunnel connecting France and the United Kingdom. The Schengen agreement (1985) stimulated the free movement of persons between the member states of the EEC, since 1993 rebaptized EU, two years before the postponed entering into force of the Schengen Treaty (1995).

At the end of the twenties, French Foreign Minister Aristide Briand, and soon Prime Minister himself, held many lectures and published about the "European Union" as the honorary president of the Pan-European movement. After his statements before the French House of Representatives (July 16 and 31, 1929), his most important speech on this issue was the economic unification of Europe, which he delivered at the opening ceremony of the 10th General Assembly of the League of Nations in Geneva on September 5, 1929, a month and a half before the Wall Street crash/collapse.³² This speech resulted in countless echoing and approving articles throughout Europe, as finally an influential diplomat, the pacifist who had brought down the Briand-Kellog Pact a year earlier, defined economic reconciliation (reduction of customs duties, removal of trade barriers) and economic cooperation as prerequisites. All sane politicians, economists and statesmen interpreted the basic principles and proposals of the functionalist speech delivered 2 years after the World Economic Congress as the most solid (economic) foundation. However, the hand of fate broke this initiative in two ways, which ultimately only had one or two processes left in the trunk, and the European Reconstruction Plan (better known by its publicist name "Marshall") (1947/48), adopted by the American Congress barely two decades later, was unfortunately relegated to the background. and was forgotten.

Briand's speech on the economic union of European states on September 5, 1929, before the General Assembly of the League of Nations, could not achieve its goal: it was not written down, nor was it elaborated in detail. His original strategy was reversed in the Memorandum, putting the proposal for political unity, which by all indications was unfeasible, in the foreground, and relegating economic cooperation to the background.³³ The majority of responses to the ques-

³¹ HUNYADI 2019

³² LONAG R 3589 50/19816/19816 Projet d'union fédérale européenne. Mémorandum.

³³ SCHIRMANN 2000. 55-61.

tionnaire accompanying the Memorandum sent to European governments complained about this, stressing that they would have preferred to undertake a gradual, economic and commercial rapprochement to a *deus ex machina*-type high-diplomatic (“hard-power” type), but an unacceptable union, thus this project also collapsed due to public opinion and nationalist conditioning of states.

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In the same line of thought, we must mention Edouard Herriot’s book in Paris in 1930 (*Les Éditions Rieder*), which reflected on the same problems.³⁴ First of all, regarding the clarification of the idea of European coopération, on page 54, in point I. a), his first question is this: “Faudrait-il viser à étendre la coopération européenne au delà du champ économique dans le champ politique? Should we aim to extend European cooperation beyond the economic field into the political field?”³⁵ This question became important in the context that both the World Economic Conference held in 1927 and the governments of European states formulated similar attitudes and recommendations. They were very skeptical of any political goal, whether it was a federal government or a unitary state on a European level, or separate entities within a larger entity somewhat similar to what existed at the time within the British Commonwealth.³⁶ The following questions raised by Herriot and addressed to European governments in his book raised the question of the geographical, or more precisely geopolitical, boundaries of European cooperation: does it include Soviet Russia or Turkey (points II. a. and b), and in the third (III.) point he addressed the forms of cooperation with the following potential players a) the British Empire with its autonomous dominions; b) colonies or dependencies of European states not endowed with autonomy, provided they have representative governments, or c) areas controlled by metropolis states; d) USA and other parts of the world. Regarding the coordination of European cooperation, Herriot is the IV. point, he also raised the question/proposal whether it would be useful to hold regular summits/meetings of foreign ministers in Geneva under the auspices of

³⁴ HERRIOT 1930.

³⁵ HERRIOT 1930. 54.

³⁶ HERRIOT 1930. 54.

the League of Nations, where issues of European cooperation can be discussed and debated (it is not difficult to recognize in these proposals the composition of the later Council of Foreign Ministers of the EEC and then the EU, and to think of the European Council, informally convened for two decades, but regularly convened from 1972, as a meeting of heads of state and government).

Another weakness of the Briand Memorandum on the Federal Union of Europe was that European states were ultimately afraid of losing some of their economic sovereignty to a higher power/authority, as Sir Arthur Salter, chairman of the Economic Commission of the League of Nations, points out. On the other hand, on the international agenda, Briand was personally aware that a specific regional customs union would threaten the universalism of the League:

“The policy of the European Union, which is supposed to be the first bond of solidarity between European governments, actually represents a concept that is completely opposite to what once defined Europe: the creation of customs unions, which seek to eliminate customs internally, but at the same time put up a stricter barrier to on the borders of the customs community, that is to say, they should actually be a means of fighting against states outside this union. The creation of such a procedure would be incompatible with the principles of the League of Nations.”³⁷ Nevertheless, under international law it would have been possible to create regional organizations. Indeed, the League of Nations Pact (unfortunately, the charter included in the Treaty of Versailles was not called a Charter) did not prohibit regional agreements and arbitration, but the apparatus of the international organization did not really encourage their creation.³⁸

Sir Arthur Salter added further critical comments to this paradox of theories as follows:

„ It was unfortunate that the perception of the “United States of Europe” often took an anti-American form. In fact, however, its obvious meaning was total free trade within Europe, the Zollverein of the countries of Europe. The problem was that “the Zollverein was often preached, not infrequently attempted, but never carried out, unless the conditions for an overwhelming political motive and an extremely close political association were (would have been) between the countries involved.”³⁹ As we know, only World War II’s devastation and the early Cold War Soviet threat provided the framework and opportunity for this cooperation among Western European countries, otherwise, except for the customs union between Belgium and Luxembourg from 1921, no other customs union were established anywhere until the BENELUX association of 1944/48. On the other hand, there were prototypes of customs union in the Habsburg monarchy (from 1850), which also preceded the happy times of peace, and in the Zollverein period quoted here verbatim (from 1833 to 1964, until the association of Bavaria). The customs union plan attempted by Germany and Austria, burdened with debt and reparations, in 1931 was foiled precisely by French grandeur and jealousy, and the following year, the Central European replica aired by Tardieu was thwarted by the jealousy of the other three European powers, and it was doomed from the start due to the incompleteness of the French plan. Nor was it conducive to taking the aired Central European cooperation plans seriously the deliberate omission of Germany from Tardieu’s Central European customs union. Germany losing its colonies became,

³⁷ LONA R3589. Les premiers Européens.

³⁸ THÉRY 1998. Art. 21 of the Pacte: “Les engagements internationaux tels que les traités d’arbitrage et les ententes régionales comme la doctrine Monroe, qui assurent le maintien de la paix, ne sont considérés comme incompatibles avec aucune de dispositions du présent Pacte.”

³⁹ SALTER 1933. 91-92.

due to German economic geographical proximity, slightly, but again increasingly strongly not only latently influencing Central Europe in the field of foreign trade, (not to mention the self-isolation and Hungarian phobia of the Little Entente states, which halted any cooperation with the Hungarians).

A month before Briand's speech, Mihail Manoilescu, the former Undersecretary of State for Romanian Finance, later the Minister of Foreign Affairs of Romania, published an article entitled "Statele Unite ale Europei" (United States of Europe).⁴⁰ His article was skeptical of idealistic approaches, but in the economic field he listed several arguments in favor of European cooperation, especially with regard to the construction of the European customs union. In this regard, the German government also maintained this, emphasizing the positional advantage of the Western European metropolis states that possessed vast colonial territories together with their vast colonial resources, while compared to them, the Baltic, Scandinavian, or the Balkan states, Poland, Czechoslovakia, Austria, Hungary, Switzerland and, finally, Germany did not have (or have none left) such a hinterland. This fact made it very difficult for the customs break and the elimination of customs walls.

The following year, in 1930, G. Tașcă, Romania's minister in Berlin, published an article with a similar tone about the so-called "Economic Foundation of the United States of Europe".⁴¹ In it, he emphasized the difficulties of forming a consensus on a common and unified tariff of the states that make up the potential union, as well as the arguments about the problems and difficulties of distributing customs revenues between member states. In the same article, the author referred to the ongoing Estonian-Latvian Union and the chances and potential of the customs union of the Little Entente, to which Poland could have joined. However, all of this was fulfilled in the last decade of the twentieth century, even then only partially (that is, not in the form of a customs union, but in the form of CEFTA, the Central European Free Trade Agreement). Nine decades ago, however, the French (Pawłowsky) opposed the Austrian delegate's (Breja) proposals regarding the Austro-German customs union for political reasons. It was recognized in principle that a possible European Union should be created, but this should be centered around a hub consisting of the Benelux countries, Germany, and France, and only after that, concentrically, the customs union including France and Germany can be supplemented by the accession of others. The opposite direction and initiative was therefore uncomfortable and unacceptable for the Western powers. It is striking that the following year, in 1931, the Curtius-Schoeber (German-Austrian customs union) plan was indeed rejected and destroyed by the Hague International Committee (by 8 votes to 7).

As argued by Manoilescu and Tasca, Salters emphasized: "The commercial and customs policy of the European states is so central and a key element of their general policy, and the revenue from customs constitutes such a central and significant part of their income, that they could hardly accept that a common political authority should decide for the whole of Europe what (external) tariffs should be imposed, to determine the manner and proportions of the imposed duties and tariffs. All of these powers would give this potential supranational authority as much or more power than the national governments of all countries. On the other hand, it would practically reduce the latter to the status of self-government/local authority."⁴² The expert prediction half a century ahead

⁴⁰ MANOILESCU 1929.

⁴¹ TAȘCĂ 1930.

⁴² SALTER 1933.

seems to be confirmed if we consider the long-term reluctant EU partnership of the United Kingdom, which joined the EEC in 1973, then we consider the impasse regarding the Irish-British customs border after the actual secession in 2020 after the Brexit referendum in the light of Salter's reasoning. However, it should also be noted that as long as the Western capitalist states were relying on / usurping the resources of their colonies, they were not forced to compromise with each other in Europe, and at the same time as decolonization, due to the threat of the Cold War, they felt forced initially to first sectoral and then more general customs union reconciliation during the 1950s and 1960s. European founding fathers (Konrad Adenauer, Alcide de Gasperi, Robert Schuman, Jean Monnet, Paul-Henri Spaak, Altiero Spinelli) who were already active in the twenties and thirties and professed Christian-democratic and socialist-liberal values as statesmen maybe that wouldn't have worked either. However, the combined effect of the three factors listed above (loss of colonies, external threat, solidary and experienced, politically stable, strong statesmen) was absent in Europe in the 1930s, just as the fourth factor was not present either: the USA and a military alliance that would provide the necessary capital for reconstruction, as well as a suitable security policy environment for the gradual, step-by-step creation of the ideal "European Union". If we look at the human factor, the Briand-Stresemann tandem ended with the early death of the two, and the Pan-European and other similar movements were only able to produce a spiritual-intellectual effervescence, and personalities with a functionalist orientation were pushed to the periphery even within their own countries (Hantos Elemér) and they were very often disavowed by their own governments. Finally, the Supreme Council of the League of Nations, since the representatives of the colonial states were the voice in it, was not too interested or at all interested in weakening the organization, which was already bleeding from many wounds and standing on clay feet, even by supporting the creation of regional groups of countries.⁴³

Meanwhile, the Central European cooperation plans published a little later between 1931 and 1933 (the plans of Benes, Maniu and Tardieu, the British constructive plan) were, by all indications, just diplomatic sounding speeches intended to scatter dust, even in writing, these documents were formulated and remained only in a sketchy, convoluted form, but at the same time, each time one of the great powers regularly vetoed it, but it is no wonder that none of them yielded results, or even started at all.⁴⁴ Even the Little Entente was not able to go beyond the military-defense alliance and complement it with any more comprehensive and reciprocal economic agreement. Instead, all the Central and Eastern European states successively left behind the French influence that was midwived at the time of its creation/expansion in Versailles and entered the assembly line of German foreign trade interests.

At the level of the League of Nations, turning back on general disarmament, it gave the opportunity for general equality of arms, In the end, the international organization was also powerless against the aggressive behavior of Japan, Italy and Germany, the arms embargo and economic sanctions dwarfed compared to the resources of the occupied (Masuria, Ethiopia) and recovered (left bank of the Rhine, Saar region) territories and their associated prestige, and the powers classified as aggressors stepped out (or excluded) from the League of Nations.⁴⁵

⁴³ LONAG MOTTA 1931.

⁴⁴ BARIÉTY 1997.

⁴⁵ SCHIRMANN 2000. 55–61.

Within the framework of the League of Nations, the Green International and the Conferences of Agrarian States, which were created at that time, managed to cooperate on a somewhat more functional and practical level in the search for and finding small solutions in the field of recovery from the world crisis., de they competed fruitlessly and fruitlessly to obtain the preferences (preferential tariffs) of the Western and colonial powers, especially in the midst of the impossibility of disposing of their agricultural surplus. Western states also faced the crisis of their agrarian population, so they mainly sought to favor their colonies and reserved their favors for their own agricultural sector.

Only one path remained untouched: the functionalist approach. According to the quoted discourses of Romanian-born British David Mitrany and Aristide Briand and Stresemann, this meant that tangible goods (public goods) had to be offered to the citizens, the Europeans, such as the development of roads, railways, communication infrastructure and tourist services. Another viable alternative to public works were the designing of green garden cities or grey concrete suburban agglomerations. Its facilities where anyone can meet citizens of other nations, through railways and roads, transport channels that connect nations and cross borders, instead of building high trade walls, tariffs and customs or worse, they would propagate hatred and mistrust between nations on a cultural, educational, political level. Based on the American model and previous pragmatic proposals, new programs and public works projects were started and implemented mainly under the auspices of the League of Nations and the ILO (in partnership with professional organizations) and with international/transnational financial support (BIS- Bank of International Settlements).

As we have already presented the lesser-known story of the construction of the trans-European transport channel⁴⁶, this time we mentioned the institutions, international bodies, committees and brainstorming ideas that were active players in these programs implemented throughout the European continent in the 1930s, two decades before the European Coal and Coal Community or EEC, which was finally established in the 1950s. The formula of the European Union appeared for the first time in 1930 in the official name of an international/transnational body, in addition to various forms of literary and journalistic articles of the 19th and 20th centuries. In the past, however, the formula United States of Europe was not uncommon either, and it echoes in the name of a magazine and in the title of many articles. Other institutions gathered under the umbrella of the League of Nations also used this term continuously.

THE STUDY COMMISSION FOR THE EUROPEAN UNION AND THE PERMANENT ECONOMIC STUDY COMMITTEE OF EAST-CENTRAL EUROPE

In such not exactly friendly circumstances, two trends remained in the direction of recovery from the depression after the global economic crisis. One is the solution-finding and crisis-investigation work process of the C.E.U.E. and its Central European Delegate Assembly, the other is the launch of trans-European investments developed, financed and coordinated by the ILO and the League of Nations, which are proving to be much more functional and effective.⁴⁷

⁴⁶ HUNYADI 2019.

⁴⁷ LONAG R3589-R3594. Study Commission for the European Union

Pursuant to Article 21 of the Pact of the League of Nations (Pacte de la SDN), on September 23, 1930, the Study Commission for the European Union (Commission d'Étude pour l'Union Européenne, Study Commission for the European Union) was established based on the resolution of the General Assembly, delegates from 27 member states held their first official working session.⁴⁸ Within a year, a sub-unit/department for East Central Europe was created within the C.E.U.E. and has been operating since 1931 under the name Comité Permanente d'Études Économiques des États de l'Europe Centrale et Orientale (abbreviated CPEEEECO), Permanent Economic Study Committee of East-Central Europe. In May 1931, the CEUE discussed the economic crisis already raging in Europe and ways to overcome it, including agricultural problems, production and commodity exchange problems, the possibility of economic non-aggression, while the more specific questions were referred to four expert committees and discussed in more detail. The C.E.U.E. together with the East Central European Permanent Economic Research Committee (CPEEEECO) tried to find and show alternatives for the East Central European agrarian states. Similar to the conferences of the Eastern agrarian states taking place at the same time, the recommendations and suggestions of these studies were all “dead letters” and remained fruitless, mainly due to the universal/global crisis and the economic egoism of the Western states. Romania, on the other hand, received loans to offset its negative balance of payments. League of Nations experts led by economist Charles Rist were delegated to the side of the Romanian government to supervise the government's economic and financial policy. At the same time, the modernization of Romania's infrastructure (located in the territories acquired in 1918, added to the Old Kingdom) and its integration into the trans-European transport channels started, comprising the completion of the Romanian branch of the E60 London-Istanbul road and the plans and blueprints for the large-scale modernization of the Romanian Railways were prepared at that time (the latter, however, with the exception of the Administrative Palace of the Romanian Railway Company, which was already covered between 1946-49. they were only partially implemented in the midst of socialism, e.g. electrification of the Ploiești-Câmpina-Brașov railway section, despite the fact that in the first half of the thirties, in addition to the blueprints, their detailed cost plan was already on paper). The C.E.U.E. established two sub-committees to assess unemployment problems and a credit sub-committee to oversee public works programs at European level, proposed by ILO Director-General Albert Thomas in his memorandum. He submitted his plans to the ILO Council in April 1931, and later the C.E.U.E. Study Committee. In the second half of 1931, Thomas added the proposals of Francis Delaisi to his plans, and at the beginning of 1932, the “Comité fédéral de coopération européenne” was officially established around Delaisi and Emile Borel, which collaborated with the League of Nations' Haas Committee on Public Works Programs.⁴⁹

The construction of the European motorway network as part of the European Public Works was planned by Albert Thomas, director of the ILO, and Francis Delaisi. The Road Committee of the League of Nations operated between 1921 and 1938, working closely with international and national Touring Clubs, developing grandiose plans together with them. According to the plans, the London-Istanbul trans-European road has designated Calcutta in the eastern direction

⁴⁸ C.E.U.E. 1930.

⁴⁹ GUÉRIN 1996. 70–75.

and Capetown in the southern direction, gaining extraordinary effervescence and enthusiasm among automobile enthusiasts and in front of the modernity-loving public.

It is a fact that the use of automobiles spread primarily among business owners, aristocrats, and entrepreneurs, but politicians and statesmen did not despise the comfort provided by automobiles either. Just like horse racing in the 19th century, in the 20th century, especially between the two world wars, automobile rallies and competitions gained countless fans.. Omnibuses appeared and became widespread in the cities, and transport companies operated more heavy-duty vehicle fleets because of the boom in goods transport and consumption. In parallel with all this, the “de-dusting” of the roads in the city centers and larger cities has also become an increasingly common expectation: cobbled, yellow ceramic-brick-covered streets, asphalted roads first appeared in Western European cities and capitals, then in Central and Eastern Europe (e.g. in Temeswar) as well. Macadam (crushed gravel roads and dusty roads), gravel and dirt roads remained characteristic only of the second-, third-, and fourth-rank roads. But also in this area, for example, the “big dust” rally race on the Cluj-Erdőfelek roof round-trip route was considered spectacular, at which, in addition to bank managers from Cluj (e.g. László Bocsánczy), counts (Béldi), large landowners (Mocsonyi) and representatives of the gentry, the young Prince Nicolae, who graduated from Eaton in England, often appeared and competed (after the death of his father, King Ferdinand, between 1927 and 1930 he was a member of the Council of Regency). Unfortunately, League loans did not have a sub-program developed for urban development, but the sections of the trans-European causeway crossing cities also put a lot of pressure on the city, from the point of view that the city management tried to adapt to the development (mainly in Szeged, Hungary).⁵⁰ The local history of this large continental, transnational project is unfortunately mostly unknown, but the local newspapers and magazines still hide a lot of interesting things, so it’s worth turning the page and looking for the relevant newspaper or magazine articles, often decorated with photos (“Where there is no road, the cars are taken through the tunnel by train.”, as the article illustrating Switzerland⁵¹ showed) and caricatures.⁵²

Romania received financial support for the modernization and development of its railway infrastructure: this project benefited the entire economy, including agriculture, since warehouses, grain depots/silos had to be built (according to the plans and cost plans) at railway crossings or seaports reached by the railway .

THE PUBLIC WORKS IN HUNGARY AND ROMANIA FINANCED AND COORDINATED BY THE ILO AND THE LEAGUE

After the First World War, Romania acquired new territories from Russia and Austria-Hungary, together with these new territories, Romania as a successor state inherited long railway networks and rolling stock.⁵³

⁵⁰ ATMAT. 1934. 5. 12-13. Nemzetközi elismerés kormányunknak és a Magyar Touring Clubnak.

⁵¹ ATMAT. 1934. 3. 6. Ezeregy szépségű Svájc.

⁵² ATMAT 1932. August; 1934. 11. 14-15; 1935. 10. sz. 241.

⁵³ ER 1943. 53.

	Area km ²	The population of the state/province in 1938	Length of railway network	Length (km) of railway line per square kilometer	Length of railway line per thousand inhabitants in km
ROMANIA	295049	19750004	11375	0,039	0,576
Old Kingdom	137903	9833161	4094	0,030	0,416
Bessarabia	44422	3147646	1218	0,027	0,387
Bukovina	10442	917445	595	0,057	0,649
Transylvania (including Partium and Banat)	102282	5851752	5468	0,053	0,934

Romania had to integrate these networks and maintain the 12 thousand km long network. Both passenger transport and freight transport increased in volume: at the end of the 1930s, Romania had 5,000 passenger and 64,000 freight wagons. Traction was provided by 3,482 locomotives and 223 railway coal cars.⁵⁴ In connection with this quantitative boom, when cargo transportation almost doubled in 15 years, 1923-1938, from 2476697 thousand tons to 4380335 thousand tons, and the profit jumped from 1846656 thousand lei to 8068374 lei, the Romanian Railway Company had to implement investments and improvements in order to improve the quality of the network and services. Romania had the opportunity to receive an international loan guaranteed by the League of Nations. The Romanian Railway Company sent the project documentation to the Secretariat of the League of Nations in order to win the grant with its application documentation. These plans reveal a lot about the situation of the Romanian railway network between the two world wars, including the location and condition of stations, warehouses, tunnels, bridges and works of art located along the lines, in the vicinity of main stations, intersections or river-sea ports.

The Romanian government requested and received League loans to rebalance the balance of payments and the household, overseen by an international commission led by the French economist Charles Rist. During the reconstruction program for the modernization of Romania's national railway network: it received loans and involved ILO experts in the planning process. During this period, the electrification of the busiest section was also planned: the Câmpina-Predeal-Braşov line, but this finally took place only thirty years later. They also planned to buy electric locomotives (16 vehicles). The C.F.R. The administrative palace of the Romanian Railway Company, even though the plans had already been submitted to the League of Nations, was only completed at the end of the 1940s (it has been standing ever since, because it was placed on earthquake-proof, rolling foundations), with a budget estimated at 300 million Romanian lei. The archived collection of detailed blueprint volumes and cost plans presented to Secretary General Sir Eric Drummond through the Royal Embassy of Romania accredited to the League of Nations provides an opportunity to explore every detail of this national public works program supported by international funding. The maps illustrating the Romanian railway network also included the cost plans in chapters: a) the lines to be electrified (there is no data on the estimated cost), b) with the bridges to be

⁵⁴ ER 1943. 62-69.

built, which will cost 1.55 billion lei, c) the network dealing with displays, data transmission and data centralization, cost 860 million lei, d) the administrative palace for 300 million, e) the grain warehouses (silos) to be built at junctions and ports are included in the project files submitted by the Romanian government with an estimated cost of 440 million lei. The total cost of all this was estimated at 24 billion lei, i.e. 732 million gold francs, and the public works were planned for at least 10 years and would have employed 50,000 workers per day. The scope/proportion of foreign products and foreign labor was estimated at 25-30%.⁵⁵

On June 13, 1933, the Economic and Monetary Conference of the League of Nations discussed the problems and international issues that had been observed in connection with public work. Here, the League's investigative committee submitted a report to the Communications and Transit Organization's committee dealing with issues related to public works and national technical equipment. It gave detailed lists of public works programs and classification according to how useful they are in terms of absorbing unemployment, contributing to the development of large areas, and in terms of providing the technical tools necessary for national economic development; it was emphasized that in most countries it is absolutely necessary to expand the drinking water and wastewater systems on a large scale. The countries for which these programs, several of which involved international cooperation, were: Austria, Bulgaria, Estonia, Hungary, Latvia, Poland, Romania and Yugoslavia.⁵⁶ In this group of countries, only the electrification of the Campina-Brassó railway section from Romania is among the projects to be supported/financed. The detailed rationale for the 280 million Swiss franc program included the reduction of unemployment, the improvement of communication between different parts of the country, the acceleration of works promoting international traffic, the plan for new railway sections connecting Yugoslavia, Czechoslovakia and Poland is also included with detailed cost plans, blueprints, on the attached maps also highlighted.

The same League committee nominated the following for support among other East Central European projects: Austria: programs for the modernization of long-distance routes (estimated at 95 million Swiss francs), Bulgaria for flood protection and river control, road and bridge construction (1.3 plus 11 million), Estonia for road and bridge construction (8.1 m), Hungary's national road reconstruction program (35 million), Latvia for construction of roads and bridges (98.5 million) and railway lines (33.4 million), Poland various hydraulic works in total 113,9 million worth, construction and development of roads and bridges (186), railway lines (CHF 155 million), telephone cable system (78 m), electrification works for Poland (116 m), Romania has submitted a tender request for the grandiose and complex investment estimated at 280 million Swiss francs. Yugoslavia proposed projects in 4 topics: improvement of the road network (137.5), railway lines and the Danube bridge (50.5), port of Belgrade (10.2) and development of state railways (180 million). However, not all work programs were deemed "payable" by the committee: only the project dealing with the electrification of the Câmpina-Braşov line (worth 15 million) remained on the final list from the Romanian program, yet, it finally was finished lately, in 1969.

Based on the early implementation of the Haas Commission on national public works, on February 13, 1934, the third Standing Advisory Committee of IFLONS evaluated the effects of

⁵⁵ LONAG COL 159.

⁵⁶ LONAG P 96. International Federation of League of Nations Societies. f. 5

these public works in each country. They addressed the members a questionnaire in a circular letter (Appendix 3 No. 130), with the intention of drawing attention to the effects of national or international planned economic actions (public works, social and industrial programs) adapted to the world economic and financial situation, since their aim was the recovery after the economic and financial crisis and the reorganization of the economic sectors. Members were sent a questionnaire containing 5 thematic groups of questions, in this order: A. Financial control and international debts, B. Public work, C. Agriculture, D. Social and industrial programs, E. Balanced production and consumption, or other forms of national planned economy.

The collection of documents sent to the Secretary of the League of Nations and the ILO contains a variety of financial and technical plans:⁵⁷ It was planned to build 26 new railway sections, with a total length of 1304 kilometers, the construction budget of these lines was 18 million lei. In the plans for the new lines, the emphasis was on emphasizing the connection between neighboring nations and states: the Palotailva – Dorna Vatra line was designed to facilitate transport from Transylvania to Bukovina and finally to Poland and even the Soviet Union. From Karánsebes–Resita, another planned line connected an industrial mining zone with agricultural and food markets, and at the same time connected the southwestern part of Romania to Yugoslavia via the Banat.

Renovation of other sections and electrification of some sections were planned. The plan included 63 bridges, bridge piers and viaducts worth 100 million lei. Some of the projects were never implemented and never completed. A single, but the most grandiose project was almost realized before the Second World War, the construction of the administrative palace of the Romanian Railways, which was only completed at the end of the forties. The starting date for the electrification of the Campina-Brassó line was constantly delayed and was only realized during the period of socialism (1959-1965/69).

Among the projects, in addition to the rehabilitation of bridges and tunnels, there is also a plan for the construction and development of a network of logistics centers: warehouses in the neighborhood of main railway crossings and in river or seaports. On the map of the planned silos and warehouses on the infrastructural map of Greater Romania, it seems strange that these new silos are in the so-called Old Kingdom and some in Bessarabia, but none of these silos were projected/planned for the western provinces, i.e. Transylvania or Banat. Regarding the latter province, it should be noted that at the beginning of the 18th century, some sections of the Béga River were ingeniously transformed into a navigable riverbed, primarily for the purpose of transporting grain, Bánság was also a rich agricultural province of Habsburg Empire at that time. The canal is operational and navigable even in the 21st century. Regarding Transylvania and its railway transport infrastructure, it should be noted that before the First World War, the main railway junctions and marshalling stations (e.g. Tövis, Piski) were supplemented by (cooperative or private) warehouses, railway sleeper wood soaking plants, and ice factories. (Nagyenyed/Aiud). Banat and Erdély is a good example of the fact that all of these were equipped with secondary operational winged railways, were in the immediate vicinity of the triage / marshalling station, and were connected to the main lines by switches, facilitating the bulky unloading and loading of goods. The consumer cooperatives in the area unloaded the colonial and industrial goods (coffee, sugar, lamp oil, agricultural machinery) with carts and transported them from

⁵⁷ LONAG COL 159. 9A/4195/1599.

these warehouses to the village consumer cooperative, while the other more distant cooperatives ordered and received their goods by train, paying at the nearest station with a postal check according to their order before ordering or after receiving the goods. Thanks to telegraph services and reliable post offices, everything went precisely and smoothly.

At the beginning of the thirties, the modernization of roads continued throughout Europe (LONA Geneva COL 167). The initiative of the transcontinental route was cherished by the International Tourism Association of Touring Clubs.⁵⁸ At the annual general meeting of the International Tourist Association held in Istanbul in June 1930, the British Automobile Association proposed the organization and management of the great trans-European road, not by building a new one, but by improving the existing road network. The following year, in 1931, at the conference held in Vienna, the main proposal already included the route of the planned transcontinental route: from London - via Dover and Calais by fast ferry – continuing via Brussels-Cologne-Nuremberg-Passau-Vienna-Budapest-Szeged-Belgrade to Sofia arriving to Istanbul. At this conference, Czechoslovakia lobbied for the inclusion of Prague, but the Czech proposal would have meant a longer distance and more difficult terrain to cross, so it was rejected primarily for the above reasons, but secondly because of the implacable and well-argued lobby of the Hungarian Club. The main argument was that the Hungarian state had already renovated and modernized a huge part of the section between the two capitals: Vienna and Budapest, so that it could receive more traffic than planned for the transcontinental route, and what's more, the Budapest-Szeged section was already included in the three-year plans of the Hungarian government. In these circumstances, the conference accepted these strong arguments. Furthermore, at the insistence of the Romanian government, the main axis to the east was supplemented with a branch (bifurcation): through Szolnok, Nagyvárad, the cities of Transylvania and the Carpathians, reaching the Prahova Valley oil field, Bucharest and finally the port of Constanța. Thus, this successful lobbying activity remained memorable for the Hungarian public, but the performance of Romanian economic diplomacy also deserved praise. It was achieved that the trans-European canal crosses Romania almost completely diagonally, thus relieving the Romanian budget, yet carrying out national road modernization that coincides with a European road, with international public procurement and contractors (Swedish Road Construction Company) according to universal standards. The Czechs lost the argument, but the geography and hydrography did not favor their position either.

The basic principle was therefore to supplement, renovate and modernize the existing road network of the countries crossed by the European road by expanding the roads and placing them on a solid foundation. The conference soon planned and directed the adaptation of the European road arteries from London to Istanbul to the requirements of high-traffic road traffic. The main lines were adopted by the General Assembly, while the cross-border routes were determined by the national authorities: Great Britain, France, Belgium, Germany, Austria, Hungary, Yugoslavia, Bulgaria, Romania, Turkey. The 3,117 kilometers planned at the time from London to Istanbul via Dover, Calais, Brussels, Liege, Aachen, Cologne, Frankfurt, Nuremberg, Regensburg, Passau, Linz, Vienna, Győr, Budapest, Kecskemét, Szeged, Novi Sad, Belgrade, Nis, Sofia, Edirne to Istanbul still exists today. Returning to the Budapest branch, eastward from Budapest via Szolnok, Ártán, Nagyvárad, Cluj, Brasov, Bucharest, Constanta, 907 (now 1132) km, a total of 2883 (+225) kilometers from London to the Black Sea, a total of 3195 (+225) kilometers to Istanbul.

⁵⁸ SHIPPER 2009., TÓTH 1995. 103.

The plans included the further development of this transcontinental artery to India and South Africa. But in the meantime, this grandiose project required the unified coordination of certain states to conceive and implement the work. On December 18, 1934, the International Touring Tourism Association proposed to the Hungarian government the initiation and coordination of an international conference of interested governments, and as a result, the conference was convened in Budapest on September 10-14, 1935. Among the notable guests of the Ministry of Trade and Transport of the Hungarian Government, the following were invited to the conference: the Secretariat of the League of Nations, the Consultative and Technical Committee on Communication and Transit, as well as the International Tourism Federation, the International League of Red Cross and the Association Internationale des Congres de la Route in advisory status. Within a few years of the Istanbul Congress, all European governments adopted this plan in their own road building programs. Thus, every state and many international organizations were represented by several delegates at the Road Conference held in Budapest.

Even if it was planned to continue this route later possibly to India and via Cairo to Cape Town, the more pragmatic report emphasized the feasible section in its report. He also emphasized that this is not an "Autostrade" nor is it a new route. The utilitarian, utilitarian language and the purely professional sentences expressed a very functionalist approach, which was supported by the reporter's personal travel plan and travel report made by car. Each country's government has approved the route and budgeted for its modernization. The Budapest conference that convened these governments wanted to coordinate all the elements of this problem from three points of view: technical construction, customs and traffic organization, and thirdly, road organization based on the same or similar principles. The road issues included the following: the horizontal alignment, longitudinal and cross section, structures (bridges, signs), road surface (cement, brick, granite and asphalt), minimum expectations of technical issues, financial issues and the deadline for the completion of construction. Customs issues included the creation of joint customs offices at road border crossings; a permanent control system for passenger cars and the creation of standardized types of passports and driver's licenses to be issued in a similar form. The general traffic questions were the following: danger signs and road signs in general. Three years later, in 1938, another Road Conference in The Hague and Amsterdam emphasized the importance of universal road signs and conventional signs.⁵⁹ Here in The Hague, the Communication and Transit Committee of the League of Nations presented the uniform and simple road sign types already approved by the international convention held in Geneva on March 30, 1930, as convention signs: triangular signs for dangers, circular signs for absolutely mandatory instructions, and rectangular signs were designated for simpler signs. The Traffic Committee of the League of Nations developed and adopted recommendations for electric and light signals, the three-color or alternating light system (red, yellow, green, alternating or stable yellow, etc.), and the signals of railway-road crossings. All these innovations in the 1930s still seem very useful and paradigmatic in the implementation of international, interstate investments. These signs were introduced due to the acceleration of road use and the increase in the number of cars, and indirectly due to the increase in the number of accidents (in the hope of reducing them). The recommended system has already been accepted by the A.I.T, the Association Internationale des Automobile-Clubs and the Union Internationale des Villes (International Union of Cities).

⁵⁹ LONAG COL 167 VALSINGER.

Romania ranked 31st, while Hungary ranked 29th in terms of the number of people per car, with 844 and 472 people/car, respectively.⁶⁰ As Delaisi noted, omnibuses began to run between towns, transporting villagers to urban centers for work and markets. Consumer cooperatives also managed to use trucks to transport raw food to cities and consumer goods to cities. The roads connected to railway stations/stations and railway junctions and the silos designed with the loan (but unfortunately only a small number of them were built) (would have) helped the diversification of agricultural trade, and, in general, a potential increase in the purchasing power of the population was promised. The economic and financial reorganization and strengthening of East-Central Europe (would have) contributed to the resulting mutual (win-win) benefit of Western Europe.

To sum up, public works investments required their appropriate own target public and target group in what concerns the enterprises which functionally were able to participate at public procurement. County halls and towns halls were usually ordered by the respective institutions, the county council or the magistrate of the town, while country-level school-networks were usually tendered or directly ordered at ministerial level. Cross-border investments were traditionally coordinated bilaterally by two neighboring countries (Austria-Hungary and Romania) and only exceptionally by international organizations (Danube Commission since 1856, ILO and LoN in interwar period) comprising not only two, but many more states in a transcontinental integrative project, besides those projects that intended to reconnect neighboring countries separated by the Versailles-system frontiers. On the local level, of course, locally rooted cooperatives in theory had a virtual chance to participate in public procurement. Works of art and mega infrastructure of course needed expensive technology and bigger companies.

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Practical application of Anthropology of Education

A case study of Tiszabercel



ABSTRACT

Research on the school performance of Roma students draws attention to the fact that, although a positive trend can be observed in terms of the success of Roma students in the last decade, we cannot see any meaningful progress, the gap has not been reduced between Roma and non-Roma students (FEHÉRVÁRI 2015). We examined the phenomenon in Tiszabercel, Szabolcs-Szatmár-Bereg county. It is mainly due to the fact that the basic concept of Anthropology of Education is that social mechanisms are situational, so the solution attempt must also be situational (DELAMONT 2012). Based on the approach and cause-effect relationship of our research, we tried to map the peculiarities of the institution and its pedagogical practice from the point of view of the catch-up of Roma students in the elementary school operating in the settlement from the sociological perspective of education. During the empirical data collection, we used a qualitative research method, in addition to the analysis of school documents, we conducted semi-structured interviews with elementary school teachers (N=10).

KEYWORDS

school, Roma students, teachers

DOI 10.14232/belv.2024.1.9

<https://doi.org/10.14232/belv.2024.1.9>

Cikkre való hivatkozás / How to cite this article:

Tóth, Norbert (2024): Practical application of anthropology of education. A case study of Tiszabercel. *Belvedere Meridionale* vol. 36. no. 1. pp 131–144.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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INTRODUCTION

The current paper is based on the basic concept that Roma students have a great amount of difficulties concerning the fulfilment of school requirements. The school performance of Roma students has been studied in many different ways but researches carried out from the perspective of Anthropology of Educations has not gained real ground in the Hungarian scientific discourse.

Our empirical research was carried out in Tiszabercel which is a small village in Szabolcs-Szatmár-Bereg County. According to the 2011 census data, the total population of the settlement is 1,759 people. The rate of the Roma population is more than 20%. During the research, we aimed to discover why the school progress of the children of the Roma community is weaker compared to their non-Roma peers, focusing especially on the high rate of dropout of school.

In order to clarify the conceptual framework, it is necessary to point out that the conceptual definition of dropout is possible along several alternatives. Anikó Fehérvári points out that dropping out can mean a status when the individual does not progress further on his school path, and as a consequence of that, the particular student does not obtain a school qualification (FEHÉRVÁRI 2015). At the same time, dropout can also be interpreted as a process, in which case it is possible to identify the behaviour patterns and attitudes that can predict the fact of school failure and dropout (HÖRICH-BACSKAI 2018). From the point of view of our research, we combine the two aspects, so in our case, dropout means the following: repeating a grade, insufficient school performance and student behaviour patterns that can potentially induce school failures.

THEORETICAL FRAMEWORK

General overview of Anthropology of Education

In the 1950s, an anthropological aspect of educational research appeared in the United States of America, which simultaneously appeared in European pedagogical practice, primarily in Germany, and then in the 1960s in the United Kingdom. Anthropology of Education later appeared in Latin America, Israel, Japan and China, as well. (ANDERSON 2013).

The spectrum of pedagogical anthropology is broad. It deals with the socialization function of the school, the transmission of culture, and the process of enculturation. In addition, it examines the role of ethnocentrism in terms of the reproduction of inequalities. One of its basic

concepts is that a certain ethnocentrism is characteristic of all cultures, and it is largely down to the fact that for most communities their own point of view and mentality is the standard.

As a counterbalance to this, an important element of pedagogical-anthropology is cultural relativism, which calls attention to the unbiased evaluation of different cultures, and also claims that everything is relative from the perspective of different cultures (Moss 1987). Among the characteristics of Anthropology of Education, the most important basic principle from the point of view of our research is that the social mechanisms in individual communities are situational, so the solution attempt must also be situational.

Anthropology of Education as a modern anthropological trend

After the Second World War, within modern sociocultural anthropology, anthropological trends emerged. One of the main characteristics of the newly created fields of science with sub-disciplinary status is that they deal with the basic problem of anthropology. The main example of this is that individual groups of people create different cultures, live in societies with different sets of norms and their beliefs are based on different religious principles (Biczó 2019).

Another striking characteristic of newly emerging anthropological trends, such as Anthropology of Education, is that they also use the theories and methodological apparatus of other disciplines to construct their own scientific concepts. This means that they try to answer the basic anthropological question outlined above with the help of other scientific fields within anthropology. As a consequence of that, besides Anthropology of Education, other 'subdisciplines' are also created such as Cognitive anthropology or Ecological anthropology which also makes important findings from the point of view of our topic.

Ecological anthropology claims that every culture can be characterized by a natural environment, and examines what kind of interference, i.e. mutual influence, develops between the environment and society (DELAMONT 2013). During the examination of local scenes, we also pay attention to the social context of the given settlement, and we interpret our empirical data in relation to this.

From the point of view of our research, it is also necessary to emphasize that Anthropology of Education behaves as an anthropological trend of practical value and practical importance. This characteristic is the point of connection with applied anthropology. In Gábor Biczó's formulation: "...*applied anthropology is simply the recognition of the practical value of the discipline that originally developed as an academic social science and the production of knowledge raised to a separate, specialized level.*" (Biczó 2019. 112.) This realization became evident among American anthropologists after they established, based on scientific results, that anthropological knowledge has practical value.

From the scientific narrative outlined above, we draw the conclusion that Anthropology of Education behaves like an anthropological trend, since it investigates how pedagogy - as an independent field of knowledge - can be applied to the interpretation and treatment of problems that are fundamentally anthropological. Furthermore, under such circumstances, an integration movement must be carried out between groups living at different distances.

The theoretical concept of Anthropology of Education was first implemented in practice during the scientific investigation of North American Indian communities (DEMERATH – MATTHEIS

2012). The researchers started from the basic concept that children of the Indian communities are socialized in the reservation environment, in communities with a specific set of values and norms, but at the same time they have to achieve results in educational institutions operating according to the majority social conditions and norms. In this regard, we have to introduce a new concept, cultural difference. Cultural differences are the factors that make it difficult, and in some cases even impossible, for Indian children to prevail in educational institutions operating according to the value system of the majority society. The importance of Anthropology of Education must be emphasized in this situation, because Anthropology of Education recognizes the cultural difference and tries to treat the problems arising from it as a crisis situation. We use this analogue regarding the situation of Roma students in Hungary.

The reasons for the Roma student's failure at school

The difficulties and problems of students of Roma origin in relation to school and the education system have been investigated for decades by specialists in various scientific fields, sometimes using the tools of sociology and pedagogy (RÁKÓ-BOCSI 2020; VARGÁNÉ-MOLNÁR 2021), and sometimes from the perspective of cultural anthropology. approach the problem (Biczó 2014; KOCSIS 2022). Regardless of the approach, researchers often look for the failure of Roma children in school due to inadequate family socialization. The reason for this is that there is a cultural and mental discrepancy between the Roma communities in Hungary and the majority society, the consequences of which are manifested in different educational principles (RÁKÓ – LOVAS KISS 2020).

The situation is further complicated by the fact that the secondary socialization arena, i.e. public education and public education institutions, are not able to handle the gaps in primary socialization (RÁKÓ 2016). Regarding this phenomenon, Katalin OPPELT (1996) draws attention to the fact that the peculiar family socialization of Roma students raises two important problems from the point of view of the school. One is different personality development, the other is difficulties resulting from low learning motivation.

Regarding the family socialization and school progress of Roma children, Forray and Hegedűs (1999) emphasize that the unstructured way of life typical of Roma families can also be found behind the unsuccessful academic results. This has the consequence that the experience of time and the concept of time are not developed or only to a very small extent in these families. From a practical point of view, this means that their daily activities are not tied to a time limit, and this kind of flexible time management is difficult to reconcile with the school's traditional time constraints. Our previous empirical research also confirmed that in many cases school absences of students of Roma origin can also be attributed to time constraints (TÓTH 2018).

In relation to family socialization, the next essential element is that one of the cardinal educational principles of Roma parents is that they strive to fulfil their children's wishes unconditionally. According to Forray and HEGEDŰS (1999), this has the consequence that the ability to delay and self-control is not developed in children or only to a very small extent, and without these abilities, successful school performance is difficult.

In addition to all these factors, more recent research results show that in the last decade a positive trend can be observed in terms of the education indicators of the Roma population, but the gap between the education of Roma people in Hungary and the majority society has not decreased (FORRAY-HÍVES 2013). Tamás Híves draws attention to the data of the 2011 census in this regard. Quantitative data show that 22.3% of the Roma did not graduate from primary school, but this proportion is only 4.5% in relation to the majority society (HÍVES 2015). We want to map the causes of this phenomenon in a micro-community.

METHODOLOGY

The research is based on a qualitative methodology, in addition to the analysis of school documents, we conducted semi-structured interviews with the teachers of the Tiszabercel elementary school (N=10). During the research, we sought answers to the following main research questions:¹

- a) How would teachers describe the school progress of Roma students?
- b) What kind of cultural characteristics do teachers believe make it difficult for Roma students to succeed at school?
- c) What perception do the teachers have of the family socialization scene of Roma students and how do they characterize the behaviour patterns of the parents related to school and learning?

The interview questions tried to cover all important segments of pedagogical practice. We considered as key information the length of time the given teacher has been teaching at the school, because in light of this, we tried to find out how the situation of the institution developed during the period spent at the school, in the sense of what were the strengths and weaknesses of the school and the teacher's institutional career at the beginning, and how the circumstances changed at the time the interview was recorded.

We considered it important to find out what differences students think they discover. Regarding progress at school, is the fact that the student is from a minority considered an authoritative factor, or does the social situation of the student's family play a much greater role in the development of success at school? From an academic point of view, why are Roma students often not successful even when the family has a satisfactory financial background?

During the interview, we attached particular importance to the knowledge the teachers have about Roma in Hungary, for example, are they aware of which Roma groups live in Hungary and what proportion of them attend the given school. In this context, we tried to map the teachers' perception of the Roma culture and, based on their previous pedagogical practice, whether they can mention any cultural factors that directly or indirectly hinder the school progress of students of Roma origin. In this respect, we paid special attention to the situation of female and male students.

The other content elements of the interview were articulated along the following questions, among others: How do you see the parenting style of Roma parents? What do parents expect

¹ The whole research consists of two main parts: qualitative research at the local primary school and qualitative research in the local Roma community. In the current paper we publish only the empirical data concerning the school.

from the school, and how involved are they in school programs? What do you see as the solution to Roma students falling behind in school? What does the school do to reduce disadvantages?

RESULTS OF THE RESEARCH

Geographical and social background of Tiszabercel

Tiszabercel is located in the county of Szabolcs-Szatmár-Bereg, in Közép-Nyírség, 32 kilometres from Nyíregyháza. It is one of the eight settlements belonging to the Ibrányi district, bordering Györgytarló and Tiszakarád to the north, Paszab to the east, Buj to the south, and Gávavencsellő to the west. Tiszabercel is located on the left bank of the Tisza, but its border is cut almost exactly in two by the river, so part of the municipality's administrative area is located on the other side of the Tisza, and in order to fulfil logistical tasks, the city administration operates a ferry.

The mayor considers the agricultural character of the settlement to be one of the main strengths of the village, based on which future food industry investments and facilities are expected to improve local economic conditions. The other important strength is the opportunities related to tourism. Tiszabercel is a settlement directly on the banks of the Tisza, the closest to the Tisza from the county seat, Nyíregyháza, and taking advantage of this geographical feature, the settlement has concrete plans and submitted tenders for the development of water tourism, water sports and fishing infrastructure.

The main weakness of the settlement is that it is exposed to macro-economic processes in an amplified way. This means that unemployment due to stopped construction investments and food industry developments as a result of a possible economic downturn could induce hopeless conditions in the settlement, primarily due to the low level of education of the Roma population, and thus the limitations of their placement in the labour market.

Regarding the socio-cultural situation of the Roma population in Tiszabercel, it is important to emphasize that the Roma population in Tiszabercel originally lived in segregated conditions. However, thanks to the micro-social processes and state subsidies that have taken place in the past decade and a half, many Roma families managed to move "inside" the village, and thus the Roma families are scattered in the settlement. It does not mean that the segregated area has completely disappeared, in fact, a distinction can be observed between the Roma living in the segregated area and the Roma who have settled there. The segregated population is poorly educated, and since daily survival is the life strategy, most of them have no perspective regarding the future. However, those who move out of the segregated can be characterized as striving, ambitious and hardworking, who can provide their families with practically the same quality of life as those belonging to the majority society.

Characteristics of the elementary school in Tiszabercel

At the elementary school of Tiszabercel, we can observe a type of ethnic segregation appearing at the educational level, which is not an unusual case in Hungary, and has become an increasingly

common problem in recent years due to demographic, geographic, and labour market reasons (The ratio of Roma students at the elementary school of Tiszabercel is 98%). Parents who are higher on the social ladder and have better socio-cultural conditions take their children from local schools and enrol them in those kinds of primary schools where the quality of the education and circumstances are much better. The consequence of this process is that, due to spontaneous segregation, basic educational institutions are created that are recruited from children of low status, mainly from Roma families. Based on our research experience, we take the position that the process is irreversible in schools that have undergone such a “transformation”. We consider our statement to be fully relevant for the Tiszabercel elementary school as well.

In the case of institutions operating under segregated conditions, students suffer predictable disadvantages from several points of view. In this regard, we consider the professional position of Gábor Kertesi and Gábor Kézdi (2009) to be authoritative, which came to the conclusion during their research that the segregated school atmosphere exerts its negative effects mainly along two main factors. On the one hand, a long-term, social consequence can be observed, as segregation has an impact on individual interaction and intergroup relations. This factor is important primarily because children from disadvantaged and/or Roma origins do not interact with their peers of other social statuses, so there is no possibility for the children to mutually acquire information about each other through school interactions. This is not only important because of the lack of benefits expected from an integrated student environment, but it also has a negative effect on the future Hungarian-Roma coexistence. The primary reason for this is that those adults, who during their school years do not come into personal contact with their peers belonging to other social groups or ethnicities, are more likely to have mistrust, prejudices and stereotypes towards people from other social status or other ethnicities (NEMÉNYI 2012).

On the other hand, it is natural that the segregated school milieu has an impact on the student’s school performance. In this regard, the researchers draw attention to the fact that education in segregated conditions also means low-quality education. The seriousness of the situation stems from the fact that quality education would be greatly needed for disadvantaged students because schools would have to function as an institution which is capable of compensating students’ disadvantageous situations. If school cannot fulfil this duty, students’ deprived social status is reproduced.

Furthermore, Attila Z. PAPP (2021) clarifies the issue of Roma’s low level of school performance by introducing an additional aspect. According to his point of view, the underachievement of Roma students in school may also depend on the location of the given school and the economic situation of the region. The sociologist draws attention to the ghettoized elementary schools, where the situation of Gypsy students is the worst and most hopeless, and their segregation continues to strengthen

In light of all of this, we were curious about the specific strengths and weaknesses of the examined educational institution, i.e. “what it is capable of”, what kind of education it can provide for the children attending the school. During the empirical data collection, the teachers were therefore asked to formulate, taking into account the years spent in the institution, what were the weaknesses and strengths of the school when they started their pedagogical work in the institution, and how it can be described the current situation from this point of view. Most of the teachers participating in the research have been working at the Bessenyei György Primary

School of Tiszabercel for decades, so we had the opportunity to examine the “development history” of the school from a more long-term perspective.

It is an interesting fact that the interviewed teachers were almost unable to mention a factor that can currently be considered strength of the school. Only one teacher mentioned a positive characteristic, but also in a resigned, disillusioned, negative connotation:

“The strength of the school is that the teachers have a lot of professional knowledge, they work very conscientiously. However, I do not equate conscientiousness with conscientious work, precise work and teaching from the soul. I must admit that I have lost my motivation.”(Teacher 5)

Regarding the weaknesses of the school, the answers received from the teachers can be divided into two groups. Primarily to the difficulties arising from the composition of the students as a result of the segregated school atmosphere and the turnover of the teachers:

“It is terribly difficult to teach in this environment. We are talking about children who are slightly more retarded than average. It’s very, very difficult to teach on an intellectual level and in all kinds of fields here in this environment. This drop in standards began when the wealthier parents took their children to the surrounding schools, Nyíregyháza, Ibrány and Gávavencsellő.”(Teacher 2)

“There are still good teachers now, but I think there are only one or two dedicated teachers like in the past. One of them just left not long ago, who left the field after 27 years and said he didn’t want to teach anymore. (...) If we go into the teacher room, it is filled with emptiness; there are many statuses that are unfilled.” (Teacher 7)

Students’ sociocultural features

We were curious about how the teachers describe the students’ sociocultural characteristics. The empirical data show that the Roma population of Tiszabercel cannot be considered a homogeneous community. Although the community is basically characterized by deprived living conditions, according to the teachers’ perception, there are more and more Roma families living in the village whose living conditions can be said to be satisfactory. One of our informants summarized the situation vividly:

“There are already Roma families here who live at a socially accepted, normal standard of living, so housing, clothing, equipment, and food is all taken care of. I still remember that this was a problem in the past. At the same time, there are people, really, who live in the segregated area, so to speak, and live very, very below the standard. (...) The overall standard of living has increased, but the problem is that it is not necessarily means that students can perform better at school.” (Teacher 1)

The interview excerpt above draws attention to an important point: learning, education, and obtaining a marketable qualification are not prioritized not only among Roma families living in a low standard of living, but also among those living in stable financial conditions. In this way, we tried to find out from the teachers what could be the reason why the school performance of Roma children living in good financial conditions is also critical. The teachers saw the roots of the problem in the value system mediated by the family. It means that children in the family environment do not receive impulses from their parents that would convey the value and

importance of learning. All this leads to the consequence that Roma students are completely unmotivated and do not show even the slightest interest in learning. The problem was formulated precisely by the teacher who has been in the field for nearly thirty years:

“Our dropout rate is very high, 36%. Our competence measurements are also always below the level, and you know the reason for this is that we often only want the child to learn better. Actually, the child doesn’t want it, the parent doesn’t want it, and then a vacuum is created somewhere here, so they are unmotivated, so there is no motivation to learn, to achieve more.” (Teacher 6)

Roma cultural patterns and school motivation

Starting from the pedagogical anthropological aspect of our research, we were interested in what role the cultural patterns of the local Roma minority play in motivation concerning learning. We therefore asked the teachers what knowledge and information they have about the culture of the Roma community in Tiszabercel. We did this because we also wanted to map the extent to which the pedagogical practices used by teachers reflect the cultural characteristics of Roma students. The most relevant interview excerpts are presented below:

“I don’t see them sticking to their culture anymore. However, I noticed that they don’t even speak the language, so they don’t speak the Romani language.” (Teacher 9)

“Roma people in Tiszabercel do not follow the traditional culture. When I was a child, I remember that there were still Roma artisans here, they wove baskets but today there is no such thing.”

“I think that on some level it’s just related to their culture that they love to have fun endlessly and don’t really care about any consequences at all. This also has an impact on the children’s school performance, because the children also participate in the parties that last until dawn, and no one is concerned with how they will come to school the next day.” (Teacher 10)

The interview excerpts above testify that the Roma community in Tiszabercel basically no longer follows the traditional Roma traditions, but at the same time, the teachers believe that they have discovered elements in the behaviour patterns of the Roma families and their children, which are the cultural imprint of the way of life and life organization of the minority community. In the following, we quote two teachers to illustrate the problem more precisely:

“When I started to teach again, I enthusiastically started planning lessons but during the first lesson I had to realize right away that it is absolutely impossible to carry out a scheduled lesson plan at this school.” (Teacher 8)

“It is not really possible to develop an action plan here. It is impossible to calculate here what happens in the next moment. Maybe it can happen that some parents show up and start fighting. As a result of it, it is not possible to plan what I do.” (Teacher 4)

The interview excerpts report on a hopeless situation where, by using the traditional teacher’s toolbox, only very minimal efficiency can be achieved in the progress of students’ school performance. Necessarily, the question arises as to how much teachers can rely on the help of parents in the heroic work carried out within the walls of the school. Empirical research has repeatedly reported that there is a correlation between children’s academic performance and

the relationship between school and parents (Forray-Hegedűs 1998). The cooperative and harmonious relationship between the institution and the parents is especially important when we examine those types of schools such as in Tiszabercel which educates a large number of Roma students.

School and parents relationship

Regarding the topic, Ilona LISKÓ (1996) draws attention to the fact that historically the relationship between the school and the Roma parents was peculiar, since the school, which conveys a different set of values, was seen by the parents, even in the second half of the 20th century, as a formal to an institution that stands “above” them. This relationship also had a positive outcome, because in the small settlements - where everyone knew everyone - the teachers had a high prestige, so they even enjoyed the support of all Roma parents in the case of possible school problems. Unfortunately, this situation has changed in the last two or three decades, which can be traced back to two main reasons. On the one hand, the social recognition of teachers has decreased, and on the other hand, as a result of educational policy decisions, Roma students were under the obligation to attend school.

The current situation is not made easier by the fact that in recent years we have witnessed that fewer and fewer men work in public education, several studies report on the “feminization” of the teaching profession. From the point of view of our topic, this is an important factor, because during field research in the Roma community of Tiszabercel, we found that the majority of Roma children are socialized in an environment organized according to a patriarchal value system, so the “leading” position of female teachers is less accepted at school.

Research on the relationship between the school and Roma parents primarily emphasizes that Roma parents are not involved in school programs and do not participate in parent meetings, so no relationship develops between them (EUGENIO 2008). Regarding Tiszabercel, the situation is more fortunate, which is mainly due to the nature of the village as a small settlement. This means that although parents do not attend parent-teacher meetings, they usually do not appear at school events either, but in the event of a problem, teachers are able to reach parents during everyday informal interactions (public service, doctor’s office, post office etc.). The teacher who has been working at the institution for nearly three decades summarized the relationship between the Roma parents and the school as follows:

“Since Tiszabercel is a small village, almost everyone knows everyone, so we can say that building relationships is very easy for us. They don’t take part in the classic school events but if there is a problem, we can reach the parents, because then we stop them at the store. But recently we can also communicate with them on Facebook.” (Teacher 5)

The quoted interview excerpt would allow us to conclude that the reasons for the failed performance of Roma students in school are not basically to be found in the parents’ attitude towards school. However, the empirical data shown below support the opposite:

“The problem is that parents don’t tell children to study. In addition, Roma parents wouldn’t be able to help their children to learn because they don’t have sufficient knowledge and abilities.” (Teacher 10)

„There is only one thing Roma parents want from school: it is childcare. They don't expect real education.” (Teacher 2)

“Parents leave everything up to the child and are not consistent in anything, for example, they buy what the child asks for; there is no such thing as giving the child a task and then it has to be done.” (Teacher 9)

In the perception of the Roma parents, the school does not appear as a potential alternative that can lay the foundation for moving up the social ladder. The parents do not have any meaningful expectations of the school - and thus of their children - with the exception of avoiding repeating a grade. Putting all this in contrast, we wanted to map how teachers relate to the reductive expectations experienced by parents, and what can be considered success in their perception.

All of the interviewed teachers based their narrative on the fact that the school, and taking into account its student composition, cannot set such expectations and requirements for the students that a school with a middle-class student recruitment base can set for their students. This actually means that the school performance that teachers expect from students can be characterized by an explicit performance reduction. This is supported by the interview excerpts below, during which the teachers formulated what they consider success in their pedagogical work:

„For me it is a big success if my Roma students can finish the primary school, but it is also a big success if I could teach them to write.” (Teacher 7)

“For me, it's already a big success if students come to class having completed homework, it is okay if it is full of mistakes, because at least they have learned that they have duties that need to be done.” (Teacher 10)

Empirical research also proves that school-level expectations set by teachers have a great impact on the quality of teacher work. Regarding this phenomenon, we should mention Rosenthal and Jacobson's *terminus technicus*, the Pygmalion effect (SZABÓ 2014). The essence of this is that the expectations set by the teachers towards the students function as a self-fulfilling prophecy, i.e. those to whom the teachers set higher standards actually produce better school results, while those students whose cognitive abilities are judged by the teachers to be less favourable perform even worse at school, due to the lower system of requirements.

Starting from the theoretical framework of the Pygmalion effect, the interview excerpts indicated above would lead us to take the position that one of the reasons for the unsuccessful school performance of Tiszabercel elementary school children is the performance reduction implied by the teachers. However, we intend to reject this possible conclusion, due to the fact that during the fieldwork at the school and in the Roma community, we were confronted with the experience that the problem of the school failure of Roma students is a more complex issue, the roots of which are rooted in the primary socialization arena, and the related problems culminate in the field of institutional socialization. Because of this – taking local conditions into account – teachers have limited “room for maneuver” and tools. To ensure the survival and basic functioning of the school, the system of requirements reduced to a minimum can be considered an important factor.

After getting acquainted with the conditions of the school, we asked the teachers to formulate, apart from the acute, everyday goals, what long-term strategy they envision for promoting the school performance of the Roma students in Tiszabercel in a positive direction. The answers

received from the teachers can be divided into two groups. Most of them see the solution in the parents' change of attitude towards school and learning:

„We should work on changing parents' attitude towards school and learning. I used to say that everything starts from the family, because if the parent doesn't tell the child to study and doesn't encourage the child, then the child won't try to do well on his own.” (Teacher 6)

On the other hand, the pedagogues mentioned in several aspects that it would be a great help if there were people in the Roma community who could show direction and to whom the members of the community would listen. From this point of view, the fact that there has been no Roma ethnic self-government for years, which would facilitate this process, is considered to be an additional hardship.

V. Conclusion

The empirical data collected on the local scene provide a comprehensive picture of the problem that most village schools are struggling with, that is the spontaneous segregation mechanism, for which there is currently no alternative.

Our research revealed that in order to normalize local conditions, the school is in a forced situation, that is, the teachers have to prepare an action plan, with the help of which they can meaningfully help the secondary socialization of the Roma students and their school progress. The first step of this complex process is to positively influence parents' school-related behaviour patterns.

The practical importance of pedagogical anthropology is an important factor from this point of view. The international examples show that one of the most important practical significance of pedagogical anthropological research conducted in local communities is that it sheds light on the problem of the given community from the aspect of situationality. As a result, it offers researchers and practitioners solutions that address the root of the problem directly.

In addition to all of this, another important practical significance of pedagogical anthropology is that it interprets the successful school socialization of children in a minority situation as not a one-sided problem. This means that the school and the teachers must take into account the individual abilities and sociocultural background of the children, and the pedagogical practice must be designed and implemented in light of this.

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Rural Livelihoods in Inter-war Hungary – with Case Studies



ABSTRACT

The issue of land was central to livelihoods in the villages of the Horthy era. The majority of Hungary's agricultural land is under the cultivation of large estates and manors, while the majority of the village population owns small, fragmented estates. Thus, they are dependent on large estates and the natural environment for their supplementary livelihoods, to varying degrees and in different forms. In this paper, after a national overview, I present examples from two settlements to illustrate the rural livelihoods of the period, along which options and strategies are outlined - without claiming completeness. My sources include local historical works, official statistics, periodical press publications, and studies on the social history of the era. The first settlement is Tiszaigar from Jász-Nagykun-Szolnok county, which is basically an agrarian proletarian settlement, most of its land is owned by large estates, the population is highly vulnerable to the surrounding large estates. The other settlement, Dudar's location in Veszprém County offers several opportunities for additional livelihoods: the mountainous environment and the proximity of forests provide the population with the possibility of multiple livelihoods.

KEYWORDS

Livelihood, Rural society, Estate structure, Agriculture, Horthy era

DOI 10.14232/belv.2024.1.10

<https://doi.org/10.14232/belv.2024.1.10>

Cikkre való hivatkozás / How to cite this article:

Balázs-Legeza, Borbála (2024): Rural Livelihoods in Inter-war Hungary – with Case Studies. *Belvedere Meridionale* vol. 36. no. 1. pp 145–162.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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INTRODUCTION

In this article I describe the rural livelihoods of the period between the two world wars. The topic is part of my Phd dissertation, in which I examine rural livelihoods over a one hundred year period, 1920-2020. A key point of this hundred years in terms of livelihoods was the prevailing land issue for the villagers: land reforms, land distributions, expropriations, compensation, the creation of modern agricultural enterprises mark the milestones in this hundred years. And the result of all this is the period described here: the land tenure relations that emerge then form the basis of all subsequent changes, and in many cases, even in the early 21st century, the impact of the earlier period on the well-being of a given settlement can be discerned in the livelihoods of the people in the early 21st century.

The end of World War I and the dissolution of the Austro-Hungarian Monarchy opened a new political and social era for Hungary. For the ordinary villager, the situation of land ownership was a key issue, since, as we shall see, there was a marked inequality in the distribution of land ownership between large estates and family farms. Changing this also became a central issue in politics, under pressure from various interest groups. These social and political processes will be described in the first part of this paper, while the second part will focus on the livelihoods and forms of subsistence in two of the settlements I have studied in the period between the two world wars.

Lifestyle, and in particular livelihoods, is the origin of the study. In my work, I use the concept of livelihood opportunities, by which I mean the conditions that enable people to earn an income, to grow wealth and to support their families in a given locality. In other words, the 'palette' from which individuals can choose a strategy in a given socio-economic context. These are influenced not only by macro-historical and economic processes, but also by the social composition of the settlement, its location, its infrastructure and, in some cases, the people who occupy leading positions.

My study is on the borderline between ethnography and sociology. These two disciplines worked together in the „village studies movement” from the 1930s onwards, with similar methodologies and research focus, and the scientific results of this period are an integral part of the treatment and presentation. A significant sociographic, sociological, demographic and ethnographic literature was the result of this period. These included monographs on settlements and landscapes, which, based on sociological research and fieldwork, recognised the relationship between lifestyles and social conditions. This led to research and monographs on various social phenomena: bourgeoisification, proletarianisation, monasticism, sectarianism, other deviant forms of society. All these are indicators of social reorganisation, framed and defined by the various ways of making a living.

National descriptions, collections and directories were of great help to me in connection with the settlements studied, in which data on the settlement series also helped me to obtain specific data related to the village. I relied heavily on data from the 1930 census, broken down by settlement series (demographic, occupational data¹, on the basis of which the percentages associated with each settlement are my own calculations), and on the data collections of the Landowner Directories - the latter of which named the landowners over 100 acres per settlement.² In addition, the Directory of Commerce, Industry and Agriculture of Hungary from 1924 also lists industrialists, craftsmen and smallholders under 100 acres by settlement.³

DESCRIPTION OF THE VILLAGES SURVEYED

In my dissertation, I examine four settlements, of which two are presented in this study: Tiszaigar and Dudar. For both settlements, there are relatively rich sources from the period under study, thanks to the work of a major research group.

TISZAIGAR

It is located in the Tiszafüred district of Jász-Nagykun-Szolnok county. It was a so-called agrarian proletarian village, with a strong presence of manorial estates and related forms of livelihood (day labour, manorial servitude).

The research team of the Museum of Ethnography carried out regular, elaborate fieldwork in the settlement during 1949-1950, with the aim of a complete exploration and the preparation of a village monograph. From 1948 onwards, the process of cooperative settlement drew ethnographic attention to the disintegration of peasant life, which made it urgent to carry out a final large-scale survey. Tiszaigar was chosen for this work on the basis of three main criteria: firstly, it is a typical agrarian proletarian village, with $\frac{3}{4}$ of its boundaries made up of large estates, and secondly, it is a village with a wide range of social differences, with all the categories of landholdings that were typical until the 'liberation': large estates of over 100 acres, medium estates of between 20 and 100 acres, and medium and small estates of between 1 and 20 acres.⁴ Secondly, its geographical environment has been greatly influenced by the processes of the last 100 years (regulation of the Tisza, draining of wetlands, etc.); and thirdly, the settlement has changed a lot since the Soviet 'liberation' after World War II, with the cooperative group of farmers in the process of being formed and the large estates having become a state farm.⁵

¹ Magyar Királyi Statisztikai Hivatal: Az 1930-as népszámlálás adatai.

² Gazdacímtárak 1925 és 1935.

³ Magyarország kereskedelmi, ipari és mezőgazdasági címtára. Budapest, 1924.

⁴ VINCZE 1950. 125.

⁵ BALASSA 1955. 503.

The research started in July 1949 and lasted about 1 to 1.5 years. In December 1950 an exhibition was opened at the Ethnographic Museum⁶, presenting the results of the research and Tiszaigar. Each researcher prepared a manuscript of his work, which was summarized and compiled by László Kardos into the monograph of the village. The manuscript was completed by the end of 1951, but it was not published until the change of regime - for political reasons of the time, the work was not published.⁷

DUDAR

It is situated in Veszprém county, in the Zirc district, in the Bakony, in a mountainous area. Its livelihood was less characterised by arable farming and classical agricultural production, with a significant proportion of the population supplementing their income with cottage industry products even in the first half of the 20th century. The village's society is made up of labourers attached to manorial estates, independent farmers and 'entrepreneurs' of the period.

In 1937, a large-scale survey of local society was carried out, and the Szeged Youth Art College organised an international village research camp for English and German researchers. The invitation came from Le Play House in London and the Institute of Sociology's Institute for Field Studies, who had previously carried out village surveys in several European countries, including Slovakia in 1935.⁸

The research was organised by Viola Tomori, herself an active village researcher in villages around Szeged and in Northern Hungary, and Dudar was her choice. In her view, it was a suitable settlement for international study for the following reasons: 1. The ethnicity of the period can be captured in the settlement: Dudar is a Hungarian village of colour in the ring of surrounding Swabian and Slovak settlements. 2. 3. The land tenure relations reflect the land tenure issues of the period: the ratio of small, medium and large estates is approximately balanced - at least a good illustration of the general Hungarian land tenure relations. 4. The enclosed nature of the peasant community, which can be described as traditional, still very much defines the rules of community functioning.⁹

However, the results of the fieldwork were taken home by the foreign researchers. Here in Hungary, for a long time, almost no or very little data were included in the professional public consciousness, since the Hungarian participants mainly assisted the foreigners in their work, and did not themselves carry out any research work. Thus, it was mainly the circumstances and the conduct of the research that were known, but not the data obtained during the research. The work of Gyula Lencsés was of pioneering importance in this respect, as he searched for, translated and systematised the manuscripts, collection notes and photographs of the English researchers in the Special Collections and Archives of Keele University in England. It was thanks to this work that Dudar became truly known in 1937.¹⁰

⁶ BAKÓ 1954.

⁷ BALASSA 1955. 511.

⁸ LENCSÉS 2018. 102–104.

⁹ TOMORI 1937. 270.

¹⁰ LENCSÉS 2018., LENCSÉS 2019.

THE AGE OF REVOLUTIONS AND THE FIRST LAND REFORM

After the conclusion of the First World War, Hungary entered a tumultuous phase characterized by political and social upheaval. The final days of the Monarchy and its subsequent dissolution, the initial establishment of democracy, the Gray Rose Revolution, and the Hungarian Soviet Republic unfolded within a relatively short span of a few months to a year or two. These events set the stage for the signing of the Treaty of Trianon on June 4, 1920, which had far-reaching consequences that deeply impacted the subsequent decades, specifically the period between the two world wars known as the Horthy era.

All of these factors had a profound impact on the lives of the rural population in villages and rural areas. The most significant influence on the daily lives of these people was the land question: would there finally be a change that would provide them with a sustainable livelihood from the land? Their lives were deeply connected to nature, agriculture, and, consequently, land tenure policies.

In the first post-war government, the Károlyi government, the land reform law became a subject of intense debate right from the start. Conservative social forces, such as the National Hungarian Economic Association and the Catholic Church, as well as large landowners, sought to exert pressure and only supported the expropriation of estates over 5,000 cadaster acres. They planned for the implementation of the land reform to span decades. On the other end of the spectrum, the social democrats advocated for cooperative farming as the future, even after the complete expropriation of large and medium-sized estates. After lengthy and heated debates, a compromise solution emerged, championed by the Károlyi party and the Smallholders' Party. This solution aimed to strengthen small and medium-sized estates, ensuring the livelihood of each family. The government adopted the first decree on land reform, known as the People's Law 1919/XVIII, on 15th February 1919.¹¹ The fundamental principle of this law was that „the land belongs to the one who cultivates it.” This principle empowered the state to expropriate land (with compensation) that exceeded 500 cadastral acres (or 200 cadastral acres in the case of church land) in order to establish smaller and medium-sized estates. Additionally, the law aimed to create small estates that were of a size capable of sustaining a family and could be cultivated independently. This initiative aims to establish estates ranging from 5 to 20 acres in size. According to the People's Law, families who had previously engaged in farming but lacked adequate land, as well as families of war invalids, prisoners of war, and war widows injured in the Great War, were eligible to apply for land. The newly appointed farmers were granted the land through a perpetual lease, with the option to purchase it at a maximum interest rate of 5%. Additionally, they were provided with favorable installment payment options and a repayment period of fifty years.¹²

Ultimately, only one property was expropriated and divided based on the decree: the property belonging to Mihály Károlyi, the President of the Republic, located in Kápolna. The distribution of further land was halted due to the establishment of the Soviet Republic on 21 March 1919. As per the Soviet government's program, all estates exceeding 100 acres were expropriated and placed under the control of local councils. State farms were also established under the

¹¹ ROMSICS 2005. 118–119.

¹² 1919. évi XVIII. néptörvény a földművelő nép földhöz juttatásáról. 383–412.

supervision of the People's Commissariat for Agriculture.¹³ However, following the downfall of the proletarian dictatorship on 1 August 1919, the issue of land distribution remained unresolved. Given that over 55.8% of the arable land in the country was held in holdings exceeding 100 acres, it became evident that the existing land tenure structure was unsustainable and required a transformation. The National Smallholders' and Landowners' Party, reorganized by István Nagyatádi Szabó, outlined in its 1919 program the need for expropriation of all tied land, including religious, church, and joint-stock company-owned land. They also proposed the expropriation of estates owned by foreign citizens to facilitate land reform. Additionally, the party suggested utilizing large and medium-sized estates exceeding 500 acres, as well as land acquired during the war exceeding 200 acres, for the purpose of land reform.¹⁴

NAGYATÁDI'S LAND REFORM

The new Horthy government faced a challenging task of striking a balance between two conflicting interests: meeting the needs of the impoverished peasantry while safeguarding the interests of the large landowners. It is worth noting that the government leadership did not have any intention of implementing significant changes to the existing land tenure structure.¹⁵ Due to the conservative nature of Miklós Horthy's governorship, he still considered the aristocracy, the large landowners, to be one of his most important social bases, and therefore did not wish to oppose them.¹⁶ However, the more progressive and liberal parties advocated for land reform, which they envisioned as the state expropriating land and granting leaseholds to the peasantry. As a result, land reform continued to some extent, albeit in a limited manner. This was evident through the adoption of Article XXIX of 1920, which focused on the „Declaration of house sites and the formation of small leases in urgent cases that cannot be postponed,”¹⁷ as well as Article XXXVI of 1920, which aimed to improve the distribution of land.¹⁸

The presence of loopholes and inadequate wording in the law resulted in numerous abuses during its implementation. Unfortunately, these abuses disproportionately affected the small land claimants, who lacked the means to protect their interests throughout the lengthy bureaucratic process. In many instances, the designated housing sites were located in uninhabitable areas, such as stream beds, floodplains, wild water meadows, or far away from the village center. Furthermore, access to credit facilities for individuals in these lower social strata was severely limited, burdened by bureaucracy and sluggish processes. The pressing need to address the housing problem resulted in unsanitary living conditions. Makeshift shacks, small huts, and houses with rudimentary walls were hastily erected, and in numerous instances, the newly fortunate homeowners resided in earthen pits.¹⁹ The nature and hierarchical functioning of the enforcement process are well illustrated by

¹³ BARTHA 2010. 174.

¹⁴ TOLNAY 2000. 31.

¹⁵ NAGY 1989. 24.

¹⁶ GYÁNI – KÖVÉR 2001. 381.

¹⁷ 1920. évi XXIX. törvénycikk halasztást nem tűró sürgős esetekben házhelyek kijelöléséről és kishaszonbérletek alakításáról. 1494–1495.

¹⁸ 1920. évi XXXVI. törvénycikk a földbirtok helyesebb megoszlását szabályozó rendelkezésekről. 1918–1962.

¹⁹ WEIS 1931. 39–40.

the fact that authorities often sabotaged the execution, the wording of the law left many loopholes, and it was not uncommon for the estate servants claiming the land to be dismissed from their jobs. Additionally, the procedural costs had to be paid in advance, regardless of the success of the procedure.²⁰ The land reform resulted in an increase in the number of smallholdings, but unfortunately, these smallholdings did not offer a sustainable agricultural livelihood.

In total, the land reform gave 411,500 people access to a total of 700,000 acres of land, averaging only 1.7 acres in size.²¹ Subsequently, due to the aforementioned frequent failures and bankruptcies, a process of redevelopment was initiated. This was primarily because the land provided was insufficient to sustain the farmers themselves, let alone cover the costs of redemption or taxes. Furthermore, the landowners had previously relied on sporadic agricultural work and lacked the necessary tools and knowledge required for effective cultivation.²² Being penniless agrarian proletarians, they were forced to use hired labour to pay for the labour, so that their independent farms often could not bear the cost of it, and they quickly went bankrupt.²³

The land law did not change the land tenure structure in any meaningful way, and the disproportionate distribution of land ownership, which accompanied and deepened the social problems of the inter-war period, remained.

INCOME CONDITIONS

A key feature of Horthy-era society is its deeply entrenched and inflexible social structure. While feudalism and monarchy are no longer present in the legal and economic systems, social change remains sluggish. Social status remains largely determined by one's birth, with limited opportunities for upward mobility.

The income distribution was heavily skewed towards the top, with the top 20% of the population earning five times as much as the other 80%. The top 20% of the population had an average annual income of 1,525 pence, while the bottom 80% had an average annual income of 288.8 pence.²⁴ The majority of the lower 80%, specifically 72% of this group, comprised individuals living in rural areas. Therefore, the rural population accounted for the largest portion of the low-income demographic.²⁵

In contrast, during that period in Germany, the top 0.7% of the population earned just 10% of the total income, while the majority of the population (90%) earned approximately 60% of the total income.

During this period, a relatively impoverished society emerged, characterized by the concentration of economic resources among a narrow elite consisting of large landowners and major capitalists. In contrast, there existed a small middle class and a vast population of proletarian and semi-proletarian individuals, numbering in the millions, who were in opposition to this elite.²⁶

²⁰ BARTHA 2010. 176–177.

²¹ BARTHA 2010. 178.

²² BARTHA 2010. 179.

²³ KERÉK 1939. 219.

²⁴ MATOLCSY 1936. 286.

²⁵ GUNST 1987. 14.

²⁶ GYÁNI – KÖVÉR 2001. 218–220.

LAND DISTRIBUTION, PEASANT LANDOWNERS

The majority of categorical analyses define a homestead as encompassing at least 5 acres.²⁷ However, it's important to note that the size of the farm is just one aspect determining the minimum livelihood requirements. Other crucial factors include the land's quality, its proximity to market centers, transportation accessibility, and the type of crops cultivated.²⁸ For instance, for Bulgarian-style horticulture, a mere 1-2 cadastral acres may suffice, while vineyards and orchards covering less than 5 acres can still yield a decent livelihood. Nevertheless, such smaller farms are relatively uncommon, and most diminutive-sized farms often fail to provide a satisfactory standard of living.²⁹

I don't intend to deconstruct the categories, but it's important to emphasize that the minimum landholding size necessary for subsistence is established at 10 acres. This figure may be close to the lower threshold of what's considered the average subsistence level, as indicated by István Weis in 1931³⁰, along with similar definitions by István Roszner in 1936³¹, and Mihály Kerék in 1934³².

In the distribution of landholdings, a pattern similar to income distribution emerges, with approximately 80-20% shares relative to the subsistence line. Nearly 80% of landholders possess less than 10 acres, which is insufficient for sustaining themselves, necessitating additional income sources. However, despite this, these 81.8% of farms collectively occupy only 17.7% of the total agricultural land.³³

This is arguably the most crucial value for comprehending rural livelihoods: vast populations relying on an exceedingly small foundational element for subsistence - land.

Smallholdings, which are characterized as landholdings of up to 100 acres, make up just 17.3% of all landholdings but encompass 36.9% of the total land area. This category can be identified as the smallholder stratum, where farms are primarily operated as family-run enterprises, relying heavily on the labor of family members. Within this economic framework, human labor is essentially self-exploited to its fullest extent, leaving little output available for expenditure elsewhere. This also serves as a form of self-preservation, to some degree, against external economic fluctuations.³⁴

The data mentioned above, concerning the distribution of landholdings, exclusively pertains to landowners. Furthermore, there exists a wholly destitute stratum comprising former serfs (destitute day laborers) and manorial servants. These two groups live from one year to the next, lacking any means of subsistence that would render their livelihoods even marginally predictable.

The presence of large estates is the root cause of this imbalanced distribution of land and livelihoods. If these estates were divided into smaller parcels and managed as family farms,

²⁷ PALÁDI-KOVÁCS 2001. 201., BEREND T. – SZUHAY 1989. 300., ELEK 1938. 217., GYÁNI – KÖVÉR 2001. 310.

²⁸ KERÉK 1934. 17.

²⁹ NÉMETHY 1940. 273., KERÉK 1934. 19.

³⁰ WEIS 1931. 30.

³¹ ROSZNER 1936. 350–351.

³² KERÉK 1934. 23.

³³ BEREND T. – SZUHAY 1989. 300.

³⁴ SZUHAY 1982. 139.

they could potentially support four times as many families. Furthermore, even in its current configuration, these estates offer only modest living conditions for their workers, which are on a declining trend due to advancements in mechanization and production technology.³⁵

INDUSTRY AND SOCIETY, SUPPLEMENTARY LIVELIHOODS

The persistence of large estates in Hungary can be attributed to the unique economic conditions of the country. In many regions of Western Europe, the rapid pace of industrial development resulted in the early demise of the large landholding system. Industrialization in these areas led to the migration of a substantial portion of the workforce from agriculture to industry, consequently driving up wages and increasing the value of labor. As a result, the large landholding structure ceased to be profitable and began to diminish on its own. This transformation gave rise to medium-sized farms, which are characteristic of Western Europe and often operate as family farms.³⁶ In 1934, Mihály Kerék did not deem it feasible, given the Hungarian circumstances, for large estates to naturally dissolve on their own. This was primarily because the requisite economic conditions were not in place to facilitate such a dissolution. This would necessitate equal competition among various branches of production. „Therefore, in the absence of specific institutions and regulations (such as land tenure policies), the natural evolution of land relations can be disrupted, potentially resulting in deviations that not only pose a threat to the well-being of professional landowners but also undermine the broader national interest.”³⁷

In Hungary, industrialization, albeit on a smaller scale, has enhanced living conditions in certain regions. While industrial production was primarily centered in Budapest (in 1930, 85% of the industrial workforce resided in the capital), there were also small industrial and commercial hubs in the Transdanubian region and the northern areas.³⁸ In many of these regions, industrial labor often served as a supplementary source of income to the meager agricultural livelihood. Sugar factories, in particular, serve as a typical example of such factories in rural areas. These factories typically operated with a minimal permanent workforce but would hire significant numbers of temporary workers, sometimes numbering in the thousands, during the autumn season.³⁹ „In Ács, nearly half of the village relies on the sugar factory for support. During a season, carpenters can earn between 20,000 to 22,000 pence. What’s surprising is that the residents of Ács enjoy a relatively prosperous life. Almost all of the seasonal workers also own land. While some have as little as 2 acres, many have land holdings ranging from ten to fifteen acres. Without the presence of the factory, it’s likely that the people of Ács would be a struggling peasant village, much like many others in this region caught in the grip of the large landed estate system.”⁴⁰

A comparable source of industrial income supplementation in Northern Hungary was the mining district along the Sajó and Bódva rivers. For villages located within a 10-kilometer

³⁵ WEIS 1931. 35–36.

³⁶ GUNST 1987. 19.

³⁷ KERÉK 1934. 6.

³⁸ GYÁNI – KÖVÉR 2001. 209.

³⁹ POGÁNY 2000. 121.

⁴⁰ RÉZLER 1939. 345.

radius of the mines that were in operation, this offered the opportunity for a two-pronged lifestyle. In addition to their agricultural activities, the local population could earn additional income from the mines, primarily during the autumn to spring season, aligning with seasonal agricultural work. Péter Szuhay highlights two key aspects: firstly, the farms of mining peasants were remarkably stable due to the dependable supplementary income. Secondly, these villages experienced consistent population retention, with minimal or no emigration, and in some cases, even witnessed an influx of new residents later on.⁴¹

TISZAIGAR

During the interwar period, Tiszaigar's society predominantly revolved around its interactions with large estates. I've outlined these relationships as percentages using 1930 census data. At that time, Tiszaigar had a population of 1,635, consisting of 678 working men and women and 957 dependents. Among these, 1,279 were categorized as primary producers (including their dependents), 199 derived their livelihood from various branches of industry (encompassing self-employed craftsmen, those who employed assistants or apprentices, and family members assisting in the craft), while the remaining 157 earned their income from other sources such as transportation, public services, domestic service, and so on..⁴² We can observe that the largest portion, comprising 78% of the population, is engaged in agriculture, while a smaller number is involved in industrial and other occupations. When we look at the landholding data from the census, we find that there were only 3 landholders with over 100 acres, 3 in the 50-100 cadastral acres category, and 24 in the 10-50 acres category. The group with land holdings between 1-10 cadastral acres had the highest number of landholders, with a total of 129. In terms of earners in the landholding category (including farmers with less than 1 acre and sharecroppers), the census lists a total of 179 individuals, with helpers and dependents numbering 564. Consequently, approximately 44% of the 1,279 individuals who derive their livelihood from agriculture own land. However, when we break down the data further, it becomes evident that 83% of these landowners own less than 10 acres, necessitating supplementary income from sources beyond their land. The remaining 715 individuals who do not own land consist primarily of farm servants, numbering 113 with 271 dependents, and agricultural laborers, totaling 153 with 174 dependents. There is also a small group of civil servants, comprising 2 earners with 2 dependents.⁴³

The proportion between the penniless and the landowning classes stands at 55-45%. However, even within the landowning group, the most numerous segment is those with less than 10 acres. This group is likely contributing significantly to agrarian poverty because they cannot sustain themselves independently on their land. Therefore, we can conclude that Tiszaigar is an agrarian proletarian village, with a substantial (55%) impoverished and penniless social stratum.

In addition to the census, examining the Land Titles lists could be valuable. However, it's important to note that these lists only record holders and tenants with land holdings exceeding

⁴¹ SZUHAY 1982. 138–139.

⁴² *Az 1930. évi Népszámlálás. II. rész. 76.*

⁴³ *Az 1930. évi Népszámlálás. II. rész. 230–231.*

100 cadastral acres.⁴⁴ In this context, it becomes evident that Tiszaigar has numerous large landowners. However, the majority of them do not reside within the settlement; instead, they own land in other neighboring settlements and are connected to Tiszaigar through their place of residence.⁴⁵ More valuable data for the study of society, however, can be found in the Directory of Trade, Industry, and Agriculture in Hungary from 1924.⁴⁶ The directory also provides information on farmers with more than 10 hectares of land, as well as local craftsmen and other tradespeople, categorised by occupation. In the case of Tiszaigar, it lists 119 persons engaged in a specific profession⁴⁷. This figure is roughly consistent with the census data, with the slight variance of approximately 10 people possibly attributable to changes that occurred during the 6-year gap between the two censuses.

When we consider all of this data collectively, it becomes evident that only a tiny fraction of the most affluent landowners choose to reside within the settlement. Historically, the Széky family has been a prominent presence for centuries, with István Széky and Péter Széky managing their estates independently during this period. While János Hering still resides in the settlement, the ownership of other sizable estates is held by individuals who do not reside in Tiszaigar.

Approximately 22% of the population, equivalent to 356 people, derive their livelihood from non-agricultural activities. Another 34%, accounting for 564 people, belong to the medium, small, or small landowner category, along with their families. The remaining 44%, totaling 715 people, are considered destitute. However, it's worth noting that individuals with land holdings under 10 acres often find themselves compelled to work as day laborers for large landowners in order to generate the necessary income to support their families. Considering this, when we include the under-10-acre group within the penniless category (as those relying on labor on the large estates), it shifts the societal composition: 22% (356 people) still represent the non-agricultural stratum, 25% (415 people) are medium and small landowners, and 53% (864 people) make up the small landowners and penniless stratum.

Ferenc Bakó conducts a comprehensive examination of the stratum of craftsmen and artisans, categorizing them based on their level of dedication to their craft. Through his interviews and recollections, it becomes evident that craftsmen and artisans occupied the higher echelons of the local society. This status was also manifested in their appearance, as they typically did not wear loose trousers but rather well-fitted ones, often opting for shoes over boots. Additionally, in terms of their marriages, they had the choice of marrying a daughter from another craftsman's family or even a daughter from a family of large landowners.⁴⁸

Land fragmentation posed a persistent challenge for the landowning peasantry. Medium and smallholders frequently encountered difficulties in maintaining their land as it functioned as a family farm. Succession often led to the division of these smallholdings into multiple parcels, further complicating the already shrinking land area and making it increasingly challenging for families to sustain themselves. Moreover, these smaller

⁴⁴ *Magyarország földbirtokosai és földbérlői (Gazdacímtár) 1925. 1935.*

⁴⁵ *Magyarország földbirtokosai és földbérlői (Gazdacímtár) 1925. 153., Magyarország földbirtokosai és földbérlői (Gazdacímtár) 1935. 143.*

⁴⁶ *Magyarország kereskedelmi, ipari és mezőgazdasági címtára 1924.*

⁴⁷ *Magyarország kereskedelmi, ipari és mezőgazdasági címtára 1924. 1438.*

⁴⁸ BAKÓ 1992. 49., 15.

landholders had to contend with public charges and taxes, which placed a heavier burden on them compared to larger farmers due to their lower incomes. Adapting to market conditions and modernizing in terms of technological advancements were also formidable hurdles for them. Limited capital made it harder for them to secure loans from credit institutions for significant improvements or land acquisition. Consequently, many of these smallholders found themselves stagnating and eventually deteriorating. By the turn of the century, this stratum had reached a dead end, with available land and opportunities for upward mobility becoming scarcer. In numerous cases, individuals from this group slid down the social mobility ladder, falling into the ranks of agrarian poverty. Some managed to persevere through careful savings, the exploitation of family labor, innovative agricultural practices, and accumulated experience. Children from poorer and middle-class families often had to work as laborers, day laborers, or vineyard workers for local or neighboring landowners, primarily to secure a year's supply of wheat.⁴⁹

Even after the Nagyatádi land reform, the number of small landowners experienced significant growth. The ownership of land created an illusion of independence and upward mobility among peasants. However, this increase in small landholders also led to a substantial rise in the number of agrarian proletarians, becoming the largest stratum. For instance, in Igar, 86 individuals were allocated land, and 13 were given houses. However, the number of people seeking land exceeded 300. The 86 families who received land were distributed a total of 177 acres, averaging approximately 2 acres per family. Frequent turnover of land and leaseholds occurred, primarily because they were often granted to individuals with limited farming skills or lacking the necessary equipment to effectively cultivate the land. „Those who had some supplementary income managed to retain the land allocated to them. However, for those without any additional income, they had to undertake demanding labor for meager compensation. They plowed for 15-16 pence, sowed and threshed in exchange for only half a hundredweight of wheat. Those lacking financial resources had to toil for six days to earn an acre of plowing and hoeing, and an additional two days for each haul. To acquire thirty to forty crosses of wheat, one had to provide labor in six or seven different places, essentially working for an extended period without pay. This imposed a heavy burden on impoverished individuals, requiring them to labor for weeks on end for no compensation.”⁵⁰

In Tiszaigar, smallholders and agricultural laborers faced significant vulnerability to the influence of large estates, particularly during the winter months when employment opportunities were limited. This vulnerability intensified during the early 1930s, amidst the Great Depression, as the local landowners, the Székys, made efforts to retain day laborers in the village to secure cheap labor. To work outside the village, individuals needed to obtain permission from the village magistrate, which was often denied. This practice underscored the pervasive influence of the landlords in the village's public affairs, deeply intertwined with the fabric of daily life.⁵¹ The underemployment of farm workers and landlord's servants left them in a precarious position, susceptible to pressure from the landlords.

⁴⁹ KARDOS 1997. 237.

⁵⁰ KARDOS 1997. 219.

⁵¹ KARDOS 1997. 244-245.

DUDAR

First, let's examine the 1930 census data regarding land ownership in Dudar. Dudar encompasses 4,218 cadastral acres and is home to a population of 1,251. In terms of occupation, out of the 534 earners, 481 are farmers, along with their dependents, totaling 1,132. Additionally, among the earners, 31 are craftsmen, 3 are tradesmen, and 19 have other occupations. What is noteworthy is the absence of large landowners with holdings exceeding 100 acres in the settlement, and there are none with holdings between 50 and 100 acres either. Instead, there are 37 earners categorized within the 10-50 acre range, and the group of smallholders with less than 10 acres is the largest, numbering 131. Consequently, landholders, specifically small and dwarf landholders, including their dependents and assisting family members, amount to 707 individuals. In contrast to Tiszaigar and Milota, where landless agricultural workers were the majority, in Dudar, those who own land, even if it's just a small plot, form the majority.⁵² So here in Dudar, according to census data, 63% of people living from agriculture have all their land, and only 37% have none at all.⁵³

The census data does not list any local landowner with over 100 acres, possibly because the landowners in this area are not residents of the settlement, as indicated in the land registers. Two prominent landowners are mentioned in the Farmers' Directories. One of them is the Count Nádasdy family, whose land holdings have been gradually diminishing over the years. The other notable landowner is Richard Szávózd, who possessed 145 acres at the time of both records.

These directories also list various other land holdings in the village of Dudar, each roughly in similar proportions, ranging from 4,500 to 500 cadastral acres.⁵⁴

The village's livelihood primarily relied on agriculture, but not in the 'traditional' sense. The mountainous terrain limited the significance and feasibility of arable farming, leading to a strong emphasis on animal husbandry. Herds of cattle and pigs were raised in the open countryside, with a communal shepherd overseeing their care, including grazing in the woods and open areas. The herdsman's yearly wages were typically paid by the community, mostly in the form of agricultural products, and the employment contract with the worker was renewed on an annual basis.⁵⁵

In addition to farming, a significant cottage industry developed to supplement incomes and compensate for the poorer land: carting, broom-making, yoke-making, wheelbarrow-making, lime and coal burning, weaving.⁵⁶ The village's proximity to large forests provided them with opportunities to craft wooden tools and implements, including tools, yokes, and wheelbarrows. They sold some of these products directly at local markets and fairs, with Zirc serving as the primary 'market town' for the village. Additionally, they would transport their goods to whoever

⁵² The two figures do not add up, the landlord and landless categories do not add up to the total number of people living from subsistence farming. We do not know the reason, but it is interesting to note that two of the categories do not include earners, but have 4-4 dependents. This total of 8 persons just makes up for the missing few persons, so it may be that these dependents are in fact part of the subsistence population in some form.

⁵³ *Az 1930. évi Népszámlálás. II. rész. 33., 144-145.*

⁵⁴ *Az 1930. évi Népszámlálás. II. rész. 134., Magyarország földbirtokosai és földbérlei (Gazdacímtár) 1925. 372., Magyarország földbirtokosai és földbérlei (Gazdacímtár)" 1935. 345.*

⁵⁵ TOMORI 1986. 83.

⁵⁶ TOMORI 1986. 86.

had a buyer. Another common method of selling their products was through local traders who would purchase the items and resell them themselves. In the early 20th century, the residents of Dudar were known to sell 50,000 to 60,000 birchwood brooms each spring.

In addition to their other sources of income, the villagers also generated revenue by producing and selling hay and lime. This economic activity was facilitated by the nearby forests, which provided the necessary raw materials for coal production, including hornbeam, beech, and ash. Additionally, limestone, abundant in the hilly terrain surrounding the village, was extracted and burned in stone pits. This endeavor required skill and was frequently executed with the assistance of day laborers who oversaw the pits until the burning process was finished.⁵⁷

In terms of tradesmen, we can say that the basic trades are present in Dudar. According to the industrial directory of 1924, there are carpenters, shoemakers, blacksmiths and saddlers in the municipality, as well as a municipal midwife, 3 pubs and a water mill.⁵⁸ In 1937, there was a notable increase in the number of shoemakers in the village. Among them, István Bitmann operated a particularly large workshop, employing 12-13 apprentices during the winter season. He distributed his footwear locally, selling them in a shop adjacent to his workshop, as well as at four local markets and fairs. At these events, he typically dispatched and sold around 250 pairs of shoes. Additionally, he fulfilled orders from customers in distant counties. In 1936, István Bitmann expanded his business ventures by opening a general store, which also proved to be profitable and required additional employees.⁵⁹

In the farming community of the municipality, the middle class enjoys relatively stable livelihoods. The general impression gathered from the surveys is that individuals who are industrious and ambitious can find opportunities to sustain themselves in Dudar. What sets Dudar apart is its reliance on the opportunities presented by the nearby forest. Land ownership is quite tied up, making it challenging to acquire new land, as is the case in other parts of the country. However, the village's proximity to the forest allows those willing to take advantage of communal grazing and supplementary income sources such as lime burning, hay burning, and woodworking to earn extra money and improve their standard of living. It's important to note that this primarily benefits individuals who already possess some initial capital to support their income-generating activities.

At the start of the century, a considerable number of people from Dudar opted for emigration to the United States. In 1905, 48 individuals embarked on the arduous journey, only to later return to their homeland and bolster their economic prospects by purchasing land. Nevertheless, in 1914, the option to emigrate was abruptly revoked, and the chance to accumulate wealth and enlarge family farm holdings was once again thwarted.⁶⁰

As reflected in the census data, the population is predominantly composed of smallholders, owning less than 10 hectares of land. This mirrors the situation across the country, where land holdings continue to fragment due to succession, making it exceedingly challenging for new landowners to embark on a path of growth and development. This difficulty is exacerbated by the challenging economic and social conditions of the era. Dudar indeed has its share of these

⁵⁷ BOROSS – MÁRKUSNÉ 2000. 100–108.

⁵⁸ Magyarország kereskedelmi, ipari és mezőgazdasági címtára 1924. 719.

⁵⁹ SHAND 2019. 267–270.

⁶⁰ BOROSS – MÁRKUSNÉ 2000. 70.

small estates. However, it's worth noting that livestock farming holds significance in this region. Through communal livestock farming and the utilization of shared pastures and woodlands within the community, there's a capacity to produce a modest amount of fodder on the land. Consequently, there isn't a strict correlation between land size and the number of livestock kept.

The most economically vulnerable group consists of those who are entirely without resources and individuals who own less than 10 acres of land. To make ends meet, they must supplement their annual earnings by laboring on larger farms or estates. Unfortunately, their precarious situation is exemplified by the deplorable conditions on these manors. Several accounts have recounted nights spent in stables infested with rats or in cellars that become inundated when it rains, leaving them lying in water. Furthermore, employers exploit their lack of knowledge. While the contract specifies the number of acres they are expected to work for a particular wage, they often cannot review the contract themselves or verify the actual acreage. If they dare to voice concerns about substandard living conditions or seek to measure the land, they risk being dismissed.⁶¹

In terms of modernisation, electricity was introduced in the villages of Veszprém county in the 1930s, in 1937, there were already electric lights in several places. It was not yet common in all households, but in some places it was recorded by researchers.⁶² Researchers have observed that the interiors of craftsmen and tradesmen's homes are more modern and urban in style, yet they do not exhibit excessive or ostentatious decorations that would be out of place in the village setting. In Dudar, there is a growing trend toward factory-made linen, with linen being sold in the three local grocery stores. In the village, only a few women continue to weave linen, while others either weave it themselves or purchase ready-made linen from the store.⁶³ According to the researchers, the village's self-contained nature was already beginning to break down by 1937. In the year and a half leading up to the research period, several new businesses had been established in the village, including a new shoemaker's shop, a grocery store, a grain storage facility, and a milk collection station, all of which were successful right from the start. The grain storage facility is affiliated with a mill in Zirc, where local farmers can deposit their grain for milling. The mill then transports the grain to Zirc, and the resulting flour is delivered back to Dudar. The miller retains a tenth of the flour as compensation. This system is convenient for the farmers and profitable for the mill. Similarly, the milk collection station is a local branch of a company based in Budapest, where milk is purchased at the rate of 9 cents per liter, regardless of quantity. The residents of Dudar were eager to take advantage of this opportunity, and while they may have been short on cash, having a means to monetize their milk was a significant benefit.⁶⁴ The latter two businesses not only benefit the residents of Dudar but also extend opportunities to people in the surrounding area.

Overall, while they maintained a modest and often impoverished lifestyle, and many had to make do with very little, Dudar still provided relatively stable and reasonably satisfactory living conditions compared to national standards.

⁶¹ BREMNER – REITZER 2019b. 241–243., BREMNER – REITZER 2019a. 250–251.

⁶² FARQUARSON 2019. 380.

⁶³ SHAND 2019. 272–273.

⁶⁴ SHAND 2019. 265–267.

SUMMARY

Overall, we've observed that the trends we've seen in the national data are consistent with what's happening in the municipalities we've studied. The social structure aligns with the national average. In Tiszaigar, there's a high level of agrarian poverty and a strong dependence on large estates. They live in a situation of severe vulnerability to large estates, at the level of work and livelihood, as well as at the level of everyday life. Their livelihood opportunities are severely limited and, in this context, their standard of living is very low. In Dudar, the impact of individual ambition on livelihoods becomes evident. Although land ownership is fragmented, as is the national average, and there's a significant manorial estate on the village's outskirts, the proximity of the forest and the natural environment offer opportunities for additional sources of income. Thus, individuals can choose various ways to make a living according to their habits and entrepreneurial drive.

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Interstate solidarity and support – the case of Ukraine after the escalation in 2022



ABSTRACT

The paper aims to contribute to the question of the possible role of social capital and trust in the international system by examining the support provided to Ukraine in the first year of the Russian-Ukrainian conflict, from 24 February 2022 to 24 February 2023. In a secondary data analysis based on publicly available sources, the composition and dynamics of support will be investigated in different dimensions. The results imply that – on global context – the group of countries providing support to Ukraine is narrow, with quite significant disparities between them. In addition to the dominance of the United States of America, the involvement of the United Kingdom, Germany and Japan proves to be remarkable, and the significant aggregate share of NATO member states might be highlighted, which may also draw attention to possible specific mechanisms of social capital.

KEYWORDS

social capital, trust, international support, Russian-Ukrainian war

DOI 10.14232/belv.2024.1.11

<https://doi.org/10.14232/belv.2024.1.11>

Cikkre való hivatkozás / How to cite this article:

Balogh, Péter (2024): Interstate solidarity and support – the case of Ukraine after the escalation in 2022. *Belvedere Meridionale* vol. 36. no. 1. pp 163–176.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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1. INTRODUCTION AND RESEARCH PROBLEM

Social capital and trust can be seen as a rather specific resource. On the one hand, if we take Pierre BOURDIEU'S (2006) threefold distinction of capital theory as a starting point, alongside economic capital – which tends to be institutionalised in the form of money –, and cultural capital – which can be recognised in several different subtypes –, *social capital* can be regarded specific as it does not become a type of advantages in itself, but rather as a consequence of belonging to a group, and can provide its owner with additional opportunities through intra-group exchange relations. This interpretation of Bourdieu – which is regarded typically individualistic (ORBÁN – SZÁNTÓ 2006. 140–142) – is also reflected in James COLEMAN'S (2006) formulation in that social capital is not embodied directly in people, but rather in the *relations among* them. To the former structural character of social capital, Coleman adds the functional character of this type of capital, i.e. the characteristic that – as productive form of capital – social capital also facilitates action, promoting the achievement of goals which without the actual social resource the actors would not be able to achieve (COLEMAN 2006. 111–112).¹ The potentially positive impact of social capital for those affected, precisely through its absence, has been introduced and extended in a broader social context by Robert Putnam (2006). Putnam's approach – which is essentially a collectivist one (ORBÁN – SZÁNTÓ 2006. 140–142) – applies the term *trust* to describe this type of capital as a community resource that contributes greatly to the functioning, prosperity and development of society – or, in its absence, hinders the potential for the latter.

The positive impact of social capital – identified at the level of countries and societies – might also be relevant regarding the functioning and security of the international system. It is worth to mention – for example – to the role of various trust-building activities in preventing the emergence or escalation of conflicts (GAZDAG – REMEK 2018. 20) and the emergence of security traps (GAZDAG – REMEK 2018. 14–15). An important benefit of cooperation between countries – even at the level of institutions – is the predictability of actions (LEBOW 2013. 18), which in an international context can be associated with a focus on the importance and appreciation of trust. In addition to the actor- or micro-oriented approach based on the behaviour of states (RATHBUN 2009. 346), trust also emerges and can be interpreted in terms of theoretical schools on the functioning of the international system (WRIGHTON 2022). This is least true of *the realist school*, which assumes self-interested states operating essentially through their military and economic power in an anarchic system, in which only the absence of trust can be acknowledged. From a *liberal perspective* based on the role of shared values, international institutions and mutually beneficial interactions, trust between states – typically based on rational reason and insight – fosters cooperation and peaceful relations. In the individualist-oriented approach of *constructivist*

¹ In this respect, the more closed and dense the structure of social capital, the more it can fulfil this function.

theory, – which assumes an even broader range of actors in the international system, including various non-state actors – trust emerges as a socio-psychological resource based on shared values and understandings (WRIGHTON 2022. 17–19). Investing in cooperation and trust can therefore prove to be a worthwhile effort not only at the individual or societal level, but also in inter-state relations (WHEELER 2012), as it can contribute to the creation of capacities that would otherwise be unattainable.

In this paper accordingly we illustrate the issues of the positive role of social resources, cooperation, trust and solidarity through the case of a current conflict, the Russian-Ukrainian war. We will attempt to explore, describe and analyse the international support network that emerged in the first year of the conflict in favour of the attacked state. The conflict – which escalated at the end of February 2022 – was a major unprecedented challenge, a shock primarily for Europe, but also for the wider international community, and led to a series of initiatives expressing solidarity and cooperation with Ukraine. A focused and systematic investigation of a certain aspect of these commitments – and in particular of the potential opportunities they offer – might be interesting and fruitful to consider.

2. METHODOLOGICAL BACKGROUND

The research results presented in this paper provide an overview of the characteristics and composition of the different sources of aid that found in the support network built around Ukraine in the first year of the conflict. Ukraine has received a wide range of support in many areas, which can be seen as an expression of solidarity by other countries, but we consider that it is worth and important to differentiate between them. The support, position statements and declarations expressed by the leaders and leading political figures of a country can all be seen as important elements. Speeches, representing and voting in international organisations – above all, for example, at the UN – can also be seen as a clear statement of approach. For the purposes of this study, however, these are considered symbolic, primarily gestural support and are not examined for reasons of content and scope. Rather, the support provided to Ukraine by individual countries or even other actors in the international system can be more indicative as it is not merely symbolic but represents a material or other *practical* input, and thus allows a narrower but more substantial dimension of the issue to be examined.

The empirical analysis of the support patterns is carried out in the framework of a secondary data analysis based on a database – Ukraine Support Tracker –², by the Kiel Institute for the World Economy in Germany, which aims to collect and register the various donations and deliveries to Ukraine. The data used as a source distinguish different types of support provided in different forms.³ In our analysis, we focus primarily on bilateral forms of support – i.e. support provided by countries – but multilateral forms, typically linked to international organisations, and reference to market-based forms in order to provide a

² Source : <https://www.ifw-kiel.de/topics/war-against-ukraine/ukraine-support-tracker/>

³ For the methodological framework for data collection, see: <https://www.ifw-kiel.de/topics/war-against-ukraine/ukraine-support-tracker/>

complete picture are also included or mentioned. The scope of data analysis is narrowed to the first year of the conflict – i.e. the period from 24 February 2022 to 24 February 2023 –, and in the course of data analysis descriptive methods and graphical illustrations are employed.

3. DATA ANALYSES

3.1. Basic characteristics of aid

In the first year of the conflict, a total of more than one hundred and fifty billion euros of financial assistance flowed to Ukraine, provided bilaterally by donor countries and institutions.⁴ The distribution of this 156.59 billion EUR by area and purpose of assistance is highly polarised, with 45,81% of the total being financial and budgetary aid, and the value of military commitments being almost identical, but with a slightly higher proportion (46,03%) of the total budget. The remaining part – less than one tenth or 8.16% – is humanitarian aid. If – in addition to the above bilateral support – we also take into consideration the non-bilateral aid for Ukraine by major international organisations (International Monetary Fund, European Bank for Reconstruction and Development, United Nations, World Bank Group) – which is exclusively financial aid – the total amount of funding equals to 169,52 billion EUR, with proportions similar to those above, although the relative proportions slightly differ. In this composition, almost half of total aid (49,94%) is financial aid, while more than two-fifths (42,52%) is still military aid and only 7,54% is humanitarian aid.

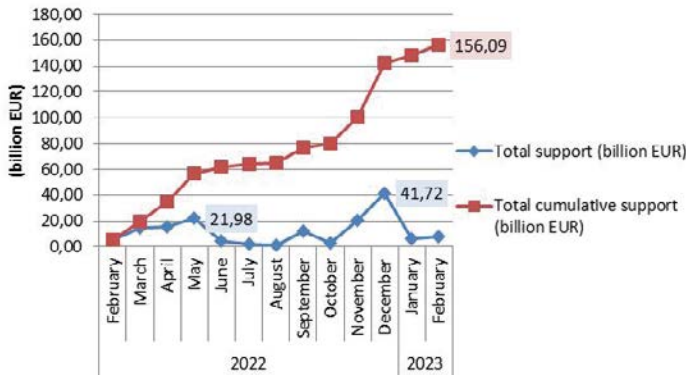
3.2. Temporal trends of support

Investigating the temporal distribution of financial support offered to Ukraine⁵, two periods of expansion can be identified as the main ones (Figure 1). The first wave of such support starts from the beginning of the conflict, reaching its peak in May, when nearly 22 billion EUR of aid is mobilised, and then stagnates in the summer months. This plain period is interrupted by a second, more intense support period which tends to develop in the second half of the autumn and in the winter, and which is more significant than the first, lasting until the end of the year, with the largest inflow of resources – totalling 41,72 billion EUR – at the end of the year in December.

⁴ Some statements also include items pledged by EU institutions - the EU Commission and Council - without which the amount that can be attributed to pure countries is €121.061 billion.

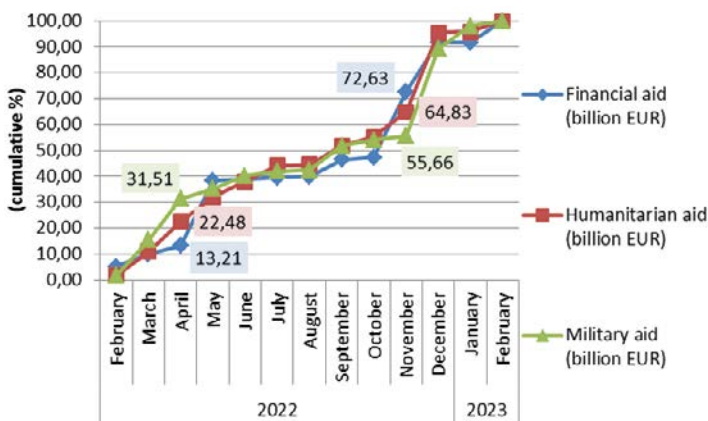
⁵ The total aid calculated for the first year of the conflict amounts to 156,09 billion EUR, which is the closest to the value of the statements aggregated by country group or aid ranking (156,59). The discrepancy for the data examined in the time breakdown is due to the fact that the time of aid cannot be fully or unambiguously established for the input information of the data series.

Figure 1: Distribution of aid over time (own calculation and editing)



If the data is distinguished along different support areas, the investigation of the internal rates may prove to be indicative, although there are no marked differences from the temporal trends of the aggregate data, only minor shifts in the targeting of resources (Figure 2). At the beginning of the investigated period – for obvious reasons – military support increases most notably: by April, military aid accounted for almost one third (31,51%) of the total aid offered to the country, while in the same period, humanitarian aid accounted for between one quarter and one fifth (22,48%), and financial aid was the lowest (13,21%). In May, however, there is a significant increase in financial aid, so that the proportions for this month are much more balanced, but financial support is relatively low in the summer months, and humanitarian aid is typically concentrated in this period. The slow growth rates that unfold from August onwards result in a kind of rebalancing in the first months of autumn. By November, this shift leads to a pattern in which only slightly more than half (55,66%) of military aid is still registered, while humanitarian aid accounts for almost two thirds (64,83%) and financial aid for almost three quarters (72,63%). The strong growth rate up to the end of the year implies a relative decrease of the differences between the proportions by December, with a uniform rate of around 90%, and no marked differences are visible in the last two months of the investigated period.

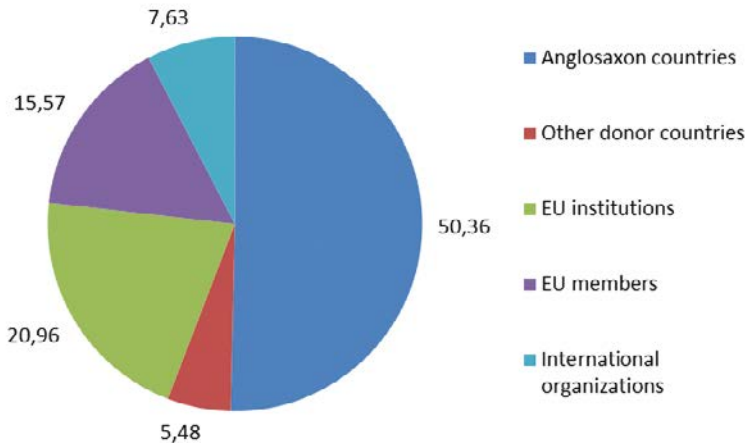
Figure 2: Distribution of aid over time by support areas (own calculation and editing)



3.3. Composition by donor groups

If we examine the distribution of total aid by country groups – typically organised on a bilateral basis – and the pattern of resources committed on an institutional-organisational basis over the investigated period (*Figure 3*), half (50,36%) of the total amount of 169,52 billion EUR belongs to the Anglo-Saxon countries⁶. The second largest share of the group donors to Ukraine can be measured in the case of EU institutions⁷ which accounts for one fifth (20,96%) of the overall, and if adding the commitments of the EU Member States (15,57%), it is still only one third of the total support. The international organisations⁸ – which provide only financial support – have a share of 7,63%, while the other countries⁹ account for approximately only one tenth of the share of the Anglo-Saxon group (548%).

Figure 3: Share of support by donor groups (own calculation and editing)



Within the areas of aid objectives, donor groups show a rather different involvement (*Figure 4*). For financial aid, the EU institutions and the Anglo-Saxon countries have a similar share, slightly above roughly one third (35,82% and 34,81% respectively), and donations from international organisations represent an even larger share of this type of aid (15,27%). There is not remarkable difference between the European Union and other countries, with proportions around 6-8%. In contrast to humanitarian aid, where the EU Member States are the dominant supporters accounting for 43,68% of resources – including the EU institutions (12,6%) – the

⁶ In the category of Anglo-Saxon countries, we find the United States of America, the United Kingdom, Canada, Australia and New Zealand, with quite different shares of participation in favour of the USA.

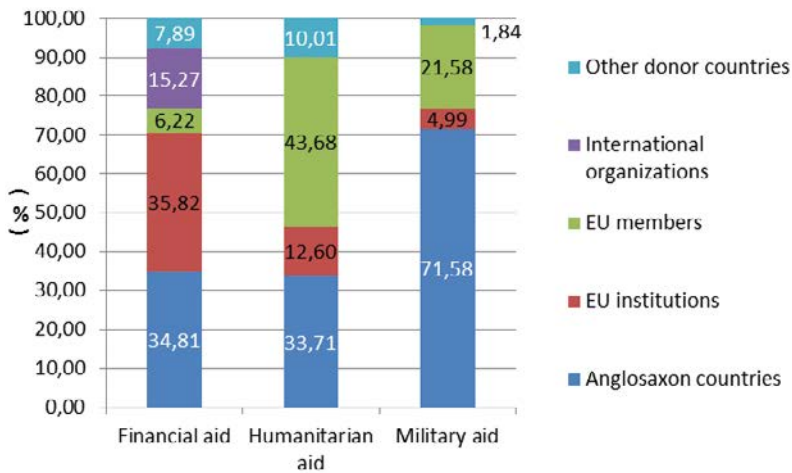
⁷ In the group called the EU institutions, the statement includes grants through the *European Peace Facility*, the *European Investment Bank* and the *EU Commission and Council*.

⁸ The group of international organisations includes the *International Monetary Fund*, the *European Bank for Reconstruction and Development*, the *United Nations* and the *World Bank Group*, which are the non-bilateral forms of aid mentioned above.

⁹ The other donor countries are quite diversified across the region, with China and Japan, South Korea and Taiwan, Turkey and India, Norway and Switzerland. Overall, Japan and Norway have relatively higher aid levels in this group.

EU's contribution accounts for more than half of total aid. Other donor countries account for one tenth of humanitarian funding, and the Anglo-Saxon countries account for one third (33,71%), as in the previous area. However, the funding pattern is again significantly changed when we look at military aid, where the Anglo-Saxon group is by far the most dominant, accounting for almost three quarters (71,58%) of total military aid. With the EU Member States accounting for more than one fifth (21,58%) and the EU institutions (4,99%), the military support can be virtually covered totally – while the other countries' contribution of 1,84% is not significant.

Figure 4: Distribution of support areas by donor groups (own calculation and editing)



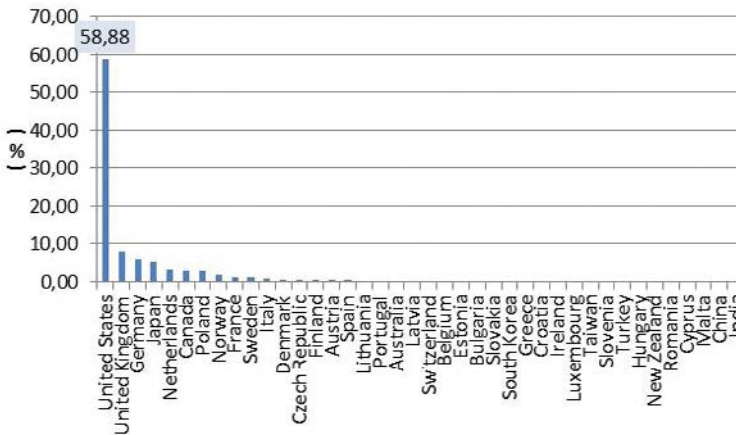
3.4. Country-level patterns

Investigating the financial support offered by countries on a bilateral basis,¹⁰ we can observe a very significant concentration of resources for the forty countries concerned (*Figure 5*). More than half (!) of all financial support comes from the United States of America: 58,88% of the resources represent financial support from the overseas country – considered the most important actor in world politics – in the first year of the Russian-Ukrainian conflict. The distribution of the remaining aid is – necessarily – rather fragmented, with each of the other countries having a share of less than ten percent.¹¹ The United Kingdom, with 8,12%, Germany – the economic leader in Europe – with 6,09%, and Japan from the Far East, with a share of over 5% (5,15%), are the most notable supporters. The Netherlands, Canada and Poland have shares of around 3%, France, Norway and Sweden from the Nordic region have proportions over 1%, while the remaining countries have shares of less than 1%.

¹⁰ In this part of the analysis, therefore, we only consider data on clearly country-specific aid, i.e. we exclude the EU Member States from the data on funds channelled through the EU institutions, and only data on individual commitments by the states are considered relevant. The total amount of aid analysed at country level in this restricted framework is EUR 121.061 billion, with a strong military component (more than half of the total (56.57%)), financial aid accounting for just over one third (34.20%) and humanitarian aid accounting for around one tenth (9.22%) of the total.+

¹¹ The distribution of resources as a share of GDP naturally leads to a different ordering of countries, but in the context of this work we have attempted to examine the distribution pattern of resources.

Figure 5: Share of donor countries (own calculation and editing)



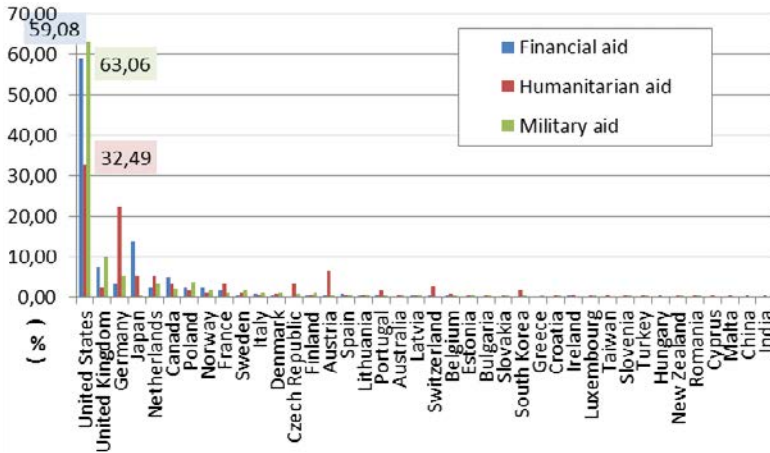
In terms of support areas, the dominance of the United States of America is also evident (Figure 6), accounting for almost sixty percent (59,08%) of financial aid, with Japan and the United Kingdom accounting for a relatively larger share – at 13,67% and 7,11% respectively. If we add to this the shares of Canada (4,97%) and Germany (3,14%), these five countries alone cover nearly nine tenths (87,97%) of all financial support.

In the case of humanitarian aid – compared to the former area – the distribution is much more balanced. Although the US is still the most important player – accounting for almost one third (32,49%) of all humanitarian aid – Germany is not so far behind, having more than one fifth (22,35%) of humanitarian aid. Austria – which previously were not included in the figures – stands out as the third largest donor (6,48%), but the Netherlands (5,26%) and Japan (5,13%) are not far behind. France, the Czech Republic and Canada also account for more than three percent (3,50%, 3,32% and 3,15% respectively). Regarding this area of support these countries – a quarter of all donors – account for 86,61% of the sources, in contrast with the previous dimension, where the same proportion was covered by only one eighth of the donors.

In the case of military support a more concentrated pattern emerges again, with the United States of America on the top occupying a far superior position, providing almost two-thirds (!) of all military aid with a share of 63,06%, and dominating this support area with no other state having a double-digit share. The United Kingdom leads this field with 9,68%, followed by Germany, Poland and the Netherlands with shares of more than five and three percent respectively (5,21%, 3,54% and 3,44%). If we add Canada – which accounts for 2,02% –, the group of just six countries accounts for 86,96% of total military aid.¹²

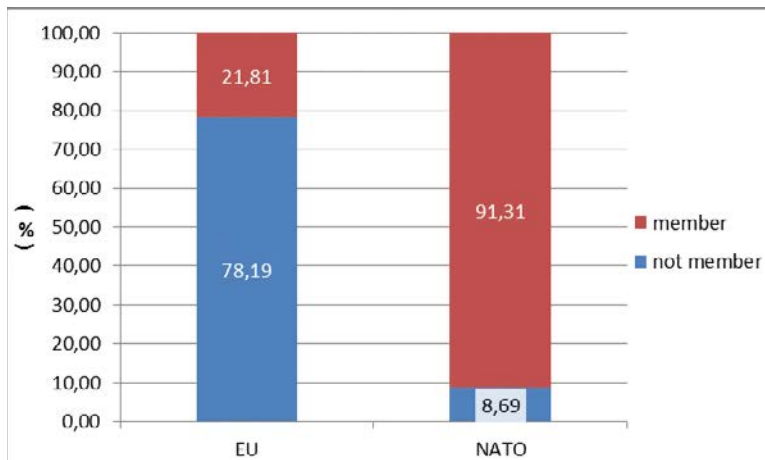
¹² In addition to military support, some countries have also provided Ukraine with some of the equipment it needed to counter the Russian offense in return for military assistance. Among these weapons are Panzerhaubitze 2000, Howitzers and drones, which Ukraine has purchased. Among the sellers are the Czech Republic, Germany, Slovakia, Poland and Turkey; the total cost – which is often incomplete – is less than 2,5 billion EUR.

Figure 6: Share of donor countries by support areas (own calculation and editing)



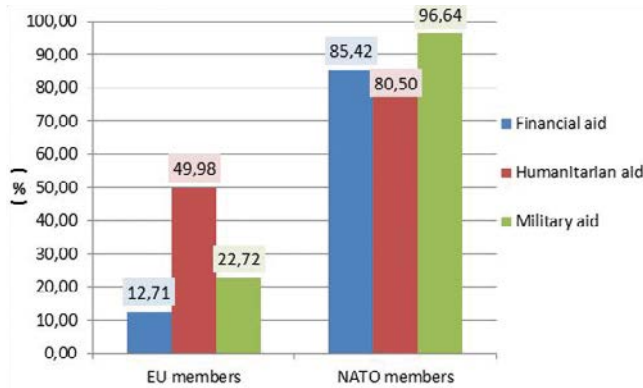
As for the country level data, it may be interesting to explore the possible role of any coalition or federal affiliation that may exist between states in terms of support activity (Figure 7). In previous analyses, we have already seen data aggregated by certain groups of countries and by supporting institutions, which could be useful in the present case, as it is certainly worth distinguishing between the involvement of EU member states – at country level – and also the activities of other countries, but NATO as a military alliance could be of equal interest. The data show that only slightly more than one fifth (21,81%) of the bilateral aid investigated by country comes from EU Member States. In contrast, support from NATO member countries appears to cover more than nine-tenths of the total, resulting 91,31% of all aid being linked to a member of the military alliance, which is significant even with the dominant role of the United States as described above.

Figure 7: Distribution of support by EU and NATO member states (own calculation and editing)



The dominance of NATO members is also clearly visible in the different areas of support (Figure 8). While the EU member states account for only 12,71% of financial aid, the share of NATO members is almost seven times higher (85,42%). The smallest difference – in accordance with the results of the previous aggregate analysis – can be measure in the share of humanitarian aid, with EU and NATO accounting for 49,98% and 80,50% respectively. In the case of military aid, an almost total dominance of NATO countries can be acknowledged (96,64%), although the disproportion is more moderate than in the first area if we consider that the share of EU countries is closer to one quarter (22,72%).

Figure 8: Contributions of EU and NATO members by support areas (own calculation and editing)



3.5 The support network of Ukraine based on arms transfers

To illustrate the diversity of actors involved in supporting Ukraine, and the complexity of the relations among them, military support can be regarded as an obvious case to examine, as these transfers of arms and equipment to the attacked country started quite early, within a relatively short period of time. Ukraine is of course at the centre of the support network, and with the highest number of relations is the primary target of diplomatic engagements and armed assistance (Graph 1).



Graph 1. Support network of Ukraine

Source: own editing

Legend: blue country: member state of the European Union, square: NATO member state, red dash: reciprocal relationship

In terms of network characteristics, the main donor and supporter of arms – in this aspect again – is the United States of America, which – in addition to its individually rather strong financial and other support role to the Ukrainian fights – plays a specific role in channelling support to Ukraine. The fact that the structure of the network does not reflect the expected simple star or hub arrangement with a single actor at the centre is partly due to the fact that the US involvement is more than just providing support to the attacked country. It seems that the US acts as a kind of bridge, an intermediary, for other countries to fulfil their commitments in supporting Ukraine: Denmark for example has sent Stinger missile parts back to the US for a subsequent arms shipment of the complete weapon. The United States influences the transfers of other countries to Ukraine in other ways as well: for example, in the case of Poland, the transfer of fighter aircraft to Ukraine was made with US consent. In early March 2022, US diplomacy encouraged the US President to support and facilitate the assistance of European countries to Ukraine for combat air power, but the US also acted as a facilitator for the transfer of Soviet-made combat aircraft to Ukraine by certain unnamed European states.

Another example of the complexity and structuring of the support network is the reciprocal relationship between Germany and Estonia, which – even in the early stages of the conflict – cooperated in helping the Ukrainian defence forces to build a field hospital and prepare for the tasks to be performed there, but Germany also plays a rather specific role in the network supporting Ukraine to fight the Russian aggressor. As Germany not only supports the Ukrainian armed struggle with its own supplies, but also contributes in other ways to make the transfers possible: for example, it has agreed the Netherlands and Estonia sending rocket-propelled grenades and Howitzers to Ukraine. But technology transfer can also be considered in the case of Germany: Slovenia, for example, has transferred its own T-42 tanks compatible with the Ukrainian forces to the country in exchange for newer manufactured German-made equipment, and Greece is replacing its older infantry fighting vehicles also with German-made ones. This embedded aspect of the network in support of Ukraine is also illustrated by Slovakia's wish to contribute to the support of the fighting in Ukraine by transferring air defence systems that could be rapidly deployed and managed by Ukrainian forces, provided that the resulting loss of defence capacity was compensated by the Western allies with other devices. The position of Poland situation is also specific in that the country functions as an entry point, a distributor – a kind of logistical hub – for other donor countries in the supply of arms to Ukraine. Spain, for example, has sent equipment – mainly defence equipment – to Ukraine to a Polish airport near the Ukrainian border. But it is also Poland which has offered fighter aircraft to the US for delivery to Ukrainian combatants. Further examples of reciprocal links in the support network also illustrate the presence of a specific relation: the symmetrical Turkish-Ukrainian link is intended to indicate that the two countries have agreed to produce Bayraktar TB2 drones in *cooperation* and joint production. In the case of Slovakia, the reciprocal relationship with Ukraine does not indicate a unilateral transfer but a traditional compensated trade agreement, and the same is the case for Poland in relation to self-propelled artillery.

The above examples are therefore only intended to illustrate – and partly to interpret – the emergence of a complex, structured cooperation network among the states that are organised to support the armed fighting of Ukraine. As can be seen in the full graph, a sub-network of actors within a smaller circle of states supporting the Ukrainian struggle is emerging, with multiple

– often reciprocal – links between them. It can be assumed that the structured and embedded characteristic of the support network also facilitates to deepen patterns of solidarity and ensure the sustainability of support.

4. SUMMARY AND CONCLUSIONS

Above, we have explored and described patterns of support for Ukraine along several aspects. Before summarising the results, it is worth pointing out that the countries and international organisations and institutions supporting Ukraine form a relatively small, well-defined group, and that there are also rather notable disproportions among them. Out of the approximately two hundred countries in the world only forty are among the supporters, which is far from outstanding in relative terms – that is, only circa one fifth of the global world is among the supporters, and the United States of America also dominates among them.

Based on the results of the data analyses, the patterns of aggregate support indicators show that (1) military and financial aid prove to be rather dominant, resulting in a polarised pattern with less than one tenth of humanitarian support. As for the (2) temporal dynamics of aid to Ukraine the results show two periods of significant growth – firstly in the quarterly period following the attack until the end of spring, and then in the late autumn and winter months. There is typically some rearrangement in the internal proportions of aid within these periods (3), but the patterns seen in the aggregate trend are also dominant in this respect. In terms of the donors (4) the remarkable dominance of the Anglo-Saxon countries could be explored, as well as in the case of the military aid to Ukraine. The joint proportion of the EU institutions and Member States is one third of the overall support, rising to more than half of the total for humanitarian aid. The share of other countries does not exceed one tenth of the total sum in any of the target areas, which is the lowest in the aggregate, not far behind the share of international organisations, which is only represented in the financial area. Accordingly, a somewhat (5) different funding role seems to be emerging between the two groups of donors, which are considered to be the main players: while the EU Member States – complemented by commitments through the EU institutions – tend to play a larger role in humanitarian aid, the Anglo-Saxon countries are dominant in the resources that underpin the military operations in Ukraine. The patterns of support in financial terms at country level show that – on the one hand – (6) the United States of America is again the most prominent player. The dominance of the USA is most remarkable in the case of military aid, but it is also dominant in the financial area. On the other hand, it is important to highlight the (7) resource mobilisation activities of the United Kingdom and Germany from the European region. Both have a relatively significant share of military aid and – especially Germany – aid in the humanitarian field, but also contribute to financial support. The geographically distant (8) Japan also proves to be a notable player, as it has a considerable overall aid value, but this is particularly true in the area of financial aid. A consistent pattern can also be seen in the fact that (9) NATO as a military alliance system is strongly dominant in the distribution of aid in contrast to the European Union, with NATO member countries far exceeding the aggregate share of EU member states in all areas of aid – especially in the case of military aid and least of the humanitarian support area. The well-defined circle of states that

organised to support the armed struggle of Ukraine against Russia are (10) interconnected in an internally structured network of – at least partially – interdependent relationships that show signs of embeddedness and – as a specific source of social capital – may also form the basis for a longer-term operation and sustainability of support.

The findings of the paper imply that a narrow and internally rather structured network (Coleman, 2006: 111) of support for Ukraine emerged and was organised in the first year of the war, which – in addition to providing significant commitments to the resistance and functioning of the attacked country – may serve as a kind of social capital that could facilitate future support, even at a higher level of embeddedness. However, the dominance of the USA and NATO countries in the support arena may imply the potential role of some additional forms or types of social capital and trust. For example, the concepts of ‘enforceable trust’ and ‘bounded solidarity’ developed by Alejandro Portes and Julia Sensenbrenner (PORTES – SENSENBRENNER 2006. 167–172) refer to mechanisms of social capital that may impose patterns of action – in this case support engagement (?) – which are seen as required or expected in some sense for the – donor – groups concerned. In a further analysis aimed at examining the subsequent evolution of the support network around Ukraine as a representation of social capital, these mechanisms could be considered as possible additional focus or research direction.

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A brief description of the value term and some value tests, considering the pre-and post-millennium value orientation of Romanian and Hungarian youth



ABSTRACT

As inherent in man, the evaluation process begins at the moment of our birth and accompanies us throughout our lives. The student's value system is formed during socialisation under the influence of various factors. Family, education, and school have a fundamental role in shaping, preserving, and changing values. It is necessary to know the learner's pre-existing values, what they represent in their behaviour, actions, and words. The student's value system is reflected in their perception and way of life; it determines their relationship with the world, reflecting in their behavioural norms, activities, moral rules they follow, Etc. In the following, I undertake a short presentation of the research on Hungarian young people in Romania with the aim of preparing a kind of chronological, a thematic overview of the implemented research. I will briefly present a couple of value sociology studies; therefore, it is not new knowledge but a thematic presentation.

KEYWORDS

value system, education system, moral development of the individual, material and spiritual values, value orientation, value preference, value types, value-socialisation, value consideration, value exclusivity, axiology, ethics

DOI 10.14232/belv.2024.1.12
<https://doi.org/10.14232/belv.2024.1.12>

Cikkre való hivatkozás / How to cite this article:

Pávai, Jenő (2024): A brief description of the value term and some value tests, considering the pre-and post-millennium value orientation of Romanian and Hungarian youth. *Belvedere Meridionale* vol. 36. no. 1. pp 177–188.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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INTRODUCTION

Value is a criterion for selecting and justifying appropriate human action to evaluate people and events. Values organise, articulate our past, present, and future, regulate the use of our physical and mental energies, delimit, and express our social belonging and social self. Values control the decisions and actions of each person and group, subordinate, juxtapose to each other. They never exist in a unique, isolated form but form an order, a system, or a hierarchy. The *top of the scale* values can be considered as *ideals*, which are absolutely positive, desirable things and conditions.

A *value system* is how specific values come together into a unified system (VASTAGH 1995). People's attitudes towards values, value creation, and value acquisition are the choice between two or more values that require the formulation of values.

Value creation is typically a free and conscious human activity, the objectification of man's subjective forces, and at the same time, man's self-realisation and self-transcendence. In their value-creating activity, men manifest themselves as a being who can transform things freely and consciously.

In everyday economic, political, and moral behaviour, the diversity of life values requires a precise definition of the concept. This is not an easy task since there is a significant gap between the experience of abstract philosophical value perceptions and research and empirical research conducted by the disciplines.

As a result of accelerated technical and social change, there is a constant change in values and value systems. There are value conflicts and a sense of general uncertainty regarding the values to be followed.

COMPREHENSIVE INTERPRETATION OF THE CONCEPTS OF VALUE, VALUE TYPES, VALUE SYSTEMS

All social sciences use the concept of value in different ways. A large number of value determinations have been made in the social sciences since the 1970s. On the one hand, values can be characterised as *subjective judgments* about a future state and, on the other hand, as *objective judgments* about the present situation. Value is what we do not have, even though we want to, what we consider essential for itself for some reason (ROKEACH 1969).

Rokeach distinguishes between the concepts of value and attitude with the aim of better understanding human action. By *attitude*, he understands the totality of different enduring beliefs about a particular object. At the same time, he refers to *values* as enduring beliefs that relate to specific behaviours or end states that are considered individually or socially desirable. Values and attitudes differ in three essential points. On the one hand, attitudes refer to specific objects, while values go beyond a specific object's relation. On the other hand, values are measures of attitudes that control not only attitudes but also actions. Finally, values are primarily preferences that apply to specific behaviours and end states. Rokeach further breaks down the theoretical categories into *instrumental* values that define dominant behaviours and *terminal* values that refer to the world's final state. Attitudes related to many thousands of specific objects can be traced back to a much smaller number of instrumental values and instrumental values to an even smaller number of terminal values (ROKEACH 1969).

According to Kluckhohn's general definition „*value is an explicit or implicit concept of what is desired, characteristic of an individual or group, and which influences which of the modes, means, and purposes of action available to them to choose.*” (VARGA 2003. 109.). „*In the process of the formation of an individual's values, his knowledge of society is integrated into these values, the values themselves are not independent of the individual's image of society and the world*” (CSATA 2005. 134.).

In many cases, the values are culture-specific. Simultaneously, there are universal, cross-cultural values of moral norms that apply to all societies and ages. For example, we can talk about religious, economic, political, etc., values. Many values can be considered cross-cultural; that is, they appear in all cultures. In this regard, SCHWARTZ (2006) starts his research by assuming that values respond to survival and well-being needs arising from biological and social interactions. Based on these, he distinguished 8 value types: *prosocial, adaptive, hedonistic, achievement-oriented, maturity-seeking, self-assertive, security- and power-oriented values*. The research covered 20 countries, 5 continents, and 8 religions.

According to the results, 10 types of values were distinguished, which can be found in all cultures: *universality* (e.g., world peace, equality, inner harmony), *benevolence* (e.g., honour, friendship, love), *traditionality* (e.g., respect for tradition, acceptance of life, humility), *conformity* (e.g., politeness, self-discipline, obedience), *security* (e.g., nation, family security, health, social order), *power* (e.g., authority, wealth, social recognition), *recognition* (e.g., success, talent, ambition), *hedonism* (e.g., enjoyment), *encouragement* (e.g., varied, exciting life, boldness), *independence* (e.g., freedom, self-esteem, creativity).

Earlier, Hankiss Elemér distinguished two types of values in his writing, *Érték és társadalom (Value and Society)*: objective and subjective values. *Objective value* is “everything that a given system (and that system can be a human organisation, an institution, a group of people, a society, or even the whole of humanity) in order to exist, function, and possibly: evolve.” Within the framework of this definition, the range of values required for a particular system will only change if the system’s environment changes, that human societies change faster than human living conditions and organisations. *Subjective value* is what a system feels, believes, judges necessary for itself, for its own existence, operation, and possibly: development. The range of these two values (objective and subjective) never overlaps. Their divergence, tension, and struggle are continuously among the fundamental factors of human-social practice and history. Because in the world of values, the law of supply and demand prevails, the values of which there are many (whatever they are vital) become conscious in man and society with very low-value intensity, of which there are few, their subjective value is much the real, objective value rises above. However, these two values interact with each other, so their future development can only be concluded by knowing each other’s relationship. (HANKISS 1977). Hankiss divided the world of values into two ranges of values (relying on traditional value theory): the range of fundamental values and the range of superior values. *Basic and life-sustaining values* are “the values that are essential for maintaining a person’s biophysical, biopsychic existence. Higher-order or life-fulfilling values are “those values that appear as surpluses compared to the previous ones, which are not directly related to the maintenance of existence, which expand and fulfil a person’s biosocial existence in a narrow sense.” (HANKISS 1977). Both value ranges are available to us in society in specific quantities.

In the absence of values, man has nothing to measure himself up to; consequently, his value’s consciousness is not built. Man is confused without norms; the order of ordinary coexistence becomes a source of grievances and tensions. The following four significant values play a significant regulatory-controlling function in social practice: the *traditional Christian value system* (for many centuries in people’s societies has allowed people to live a life rich in values, full of meaning and hope), the *Puritan-accumulating value system* (developed in the 16th – 17th centuries, which has a puritan-ascetic character, as it minimises consumption with a strict system of norms in order to accumulate goods quickly), *hedonistic consumer values* (emphasis on consumption and enjoyment, not on the accumulation of goods), *19th – 20th -century values of labour movements* (which activate forces to overthrow a given society and build a new social order). The latter three are closely related to dynamic economic progress (HANKISS 1984). It must be taken into account that the erosion and fading of norms drive people into uncertainty, into some relatively diffuse state, as it is not known whether violating or ignoring these norms makes a person guilty or not. This diffuse guilt is common worldwide, especially in rapidly evolving and transforming societies. Old norms do not work well in new situations because they have lost effectiveness, faded, and often contradict new norms (HANKISS 1986).

In their research, authors ÁGNES and GÁBOR KAPITÁNY (1983) examined the following values/value system: a *value system that preserves customs and traditions*, the main features of which are strict model-following and the existence of norms regulating lifestyle; a *bourgeois-individualist value system*, in which, in contrast to the previous one, the role of uniqueness, difference and standing out from the others is appreciated (this system is considered to be a

characteristic of the capitalist era); a *utopian-anarchist value system*, which means the denial of the existing order and material goods; a *bureaucratic value system* that demands obedience from members of society, subjecting them to a higher power, and a *socialist-communist value system*.

Group-specific norms, values, traditions, customs, and expectations function as systems regulating and controlling behaviour. Values influence social integration, employment, career choices. They are organised systematically and hierarchically, which means that claiming one value involves downgrading or rejecting another value. Values are not mere mappings of primary needs and interests. We may have values that conflict with our interests, but the tension cannot be lasting. However, complete harmony is never possible (PATAKI 1998).

Values are ideological objectification (social and culture-specific ideological objectification), which serve to express a certain quality, can simultaneously be considered self-regulatory systems of society (VÁRINÉ 1987).

LÁSZLÓ FÜSTÖS and ÁRPÁD SZAKOLCZAI researched in their study, *Continuity and discontinuity in value preferences* (1977-1998) based on the Rokeach test, based on the results of which they established that previous classical socialist values (e.g., work, peace, security, equality, etc.) had lost their significance and importance. It was found that in the years after the regime change, values were embedded in stratification and structures. Now we can see the survival of the conditions before the regime change and the signs of adaptation to the changed conditions. Values are not the same as supra-individual norms and the consensus principles of a particular society, nor are they rooted in a person's biological or physiological (subindividual) needs. Values are mostly related to managing an individual's life, fundamental principles of life that guide human behaviour. In this sense, values can also be examined at the individual level by sociological research.

The value system is a formation that becomes stable during socialisation. This stability can be supported by the example of change, as a change can modify behaviours but does not destroy the value system behind previous behaviours (PERCHERON 1999). However, it is essential to note that during transition periods, when an individual has to adapt to a changed structure and way of life, these stable formations disintegrate.

In her study of *Value transmission and change of values*, NAGYNÉ DR. ÉVA BABICS (2006) stated that *values do not exist in isolation from each other* but are in a subordinate, superior, subordinate relationship and manage activity as a system at different levels. The carriers of values are the communities of individuals and society. Social change is always accompanied by changes in values, with the emergence of new principles, views, and ideologies. A change in the order of values can mean a change in the value's position in the hierarchical order. On the one hand, it can mean a shift in the positive or negative direction, and on the other hand, the cessation of the specified value or the appearance of a new value. Traditional values change very slowly; new values and value sets are more difficult for people to accept; therefore, the change in people's actions is slower. A set of values contains objective values that are represented by goods to the individual in the world. Some of these belong to material goods, such as goods of pleasure and utility. However, values also include those of a higher order, such as virtue, compassion, cognition, aesthetics, and love (NAGYNÉ 2006).

Values control and, at the same time, regulate the use of our physical and mental energy, delimiting and expressing our belonging and social self. At the same time, the values are related

to each other and thus form value types. We represent certain values, either as individuals or integral members of a given community, class, or society. These values, such as morality, personal freedom, determine our daily actions, lifestyles, decisions, or attitudes toward others. Social values, on the other hand, change over time. This change is reflected in the differences in values between the young and the elderly, forming many causes of intergenerational conflicts. The value system can also show differences within a specific age group. Thus, for example, people living in villages tend to represent a more traditional set of values than urban ones. However, at the same time, there may be differences in the set of values between men and women, which may be influenced by the level of schooling they completed (KAMARÁS 2008).

In the field of value analysis, we come across several definitions, which do not clearly distinguish how the value-individual-society relationship prevails.

FAMILY AND SCHOOL AS AREAS OF VALUE TRANSFER:

The value system of the individual changes during socialisation under the influence of various factors: among these factors, we highlight the family and school socio-cultural environments.

The importance and irreplaceability of *the socialisation function within the family* cannot be questioned. The role of primary socialisation in the family is to introduce the child to everyday living conditions and, following specific cultural values, educate them to orient themselves in society. One of the special functions of the family is socialisation, preparing children for adult life. Parental values and parents' value transfer activities leave a mark on the child. In addition to the family, however, the school, the peer group, and the media play an increasingly important role. In many cases, in the process of value transfer, these effects are often at odds with the family's values. The peer group's impact increases, especially from adolescence onwards, when parental and school values' radically contradictory effects affect young people (SOMLAI 1997). This does not mean that parental values remain without a trace but that their impact changes over time. Parental values must "fight" with the influences flowing from the world to children and adolescents (TÓTH 1999). The difficulties of value transfer within the family are also reflected in the fact that nowadays, the system of values is confusing, and the relative value system experienced in the past has disintegrated (BUDA 2003).

In addition to *the family as a primary socialisation area*, the school plays an increasingly prominent role. *The school is a social institution*, so it clearly has something to do with values.

All education is value-oriented (although some dispute this). According to alternative pedagogies, the primary value is the student's individual fulfilment, and it is the school's job to facilitate this. In education with other orientations (such as denominational schools), values sanctified by tradition are set in education's goal system. Parents primarily expect school performance because they see the meaning of schooling in the value of the use of the psychic formations (knowledge, skill, ability, etc.) they mediate. That is, how much it allows their child to be successful both as an individual and as a workforce. This kind of attitude is instrumental in nature. Its essence is in this mediation, to get values and realise values in a regular school environment by literary goods and contents (subjects). Alternative schools and denominational schools, which have a developed specific value system, represent a different situation.

The starting point of institutional education is the conscious choice of values, which is suitable for directing the educational activity and serving the school's socialisation goal.

ÁRPÁD LAPPINTS (1998) considers the following value structure to be traceable from the point of view of education: *the values of biological existence*: respect for life, the ability to achieve a healthy lifestyle; *values of self-harmony, autonomy*: self-knowledge, ability to create inner harmony and stability; *values of social relationships*: the ability to form and nurture personal and social relationships; *values of social worthiness*: values related to work and literacy; the *values of a humanised society and world-view*: values related to the world, the nation, civil society.

It should be borne in mind that *the most popular values among students* are related to a harmonious and happy life and are not of material nature—for example, true friendship, family security, love, Etc. *Secondly*, the following are popular values: wealth, order, changing life, and many others. *Thirdly*, values belonging to the realm of social consciousness: tradition, national identity, power, politics, as well as others. Among the student's personal plans and ideas, learning and the professional path are often mentioned, as young people are aware of the importance of education and the value of education in their careers' success. Whether they like school or not, every student wants to get a profession and wants professional integration (LAPPINTS 1998).

The primary function of institutional education (schooling) is to help clarify students' basic attitudes: their inherited culture, the history of the people/nation/country they were born into or arrived at by the changes of their circumstances, how to relate to themselves, and society (LÁSZLÓ TAMÁS SZABÓ 2001). The stated values of the school are spontaneously incorporated into the student's personality. In educating about values, those educators are effective, who are credible, and able to identify with the values they have undertaken to convey. It is the basis of value socialisation, so following the original pattern. If the values and expectations expressed by adults are not in line with their own emotional and mental content, it loses its credibility for the child. The mystery of adequate value socialisation is that the educator knows the path that the student must take in his or her development, approaches the values, and is a credible mediator of these values. However, he or she must know them well.

High school students find it challenging to navigate the maze of values evoked by the social factors that affect them. One of the education process's outstanding tasks is to guide the development of the right value system and avoid value disruption. The value cavalcade formed due to factors affecting young people often leads to the pursuit of an inappropriate ideal or a lack of ideals, so there is a need for values to regain their relevance, their essence, to be re-evaluated and reassessed.

The value system's birthplace is society, i.e., using society as a tool. The education system, education, forms a well-defined value system, which it wants, which has a circular effect on society, re-evaluates, and transforms it. Society and the established/established value system thus interact, attributing it to the mediator role in education.

In modern society, spiritual values are often relegated to the background. Nor should the human sciences, the arts, the world of aesthetics, human emotions, and relationships be neglected as the competencies needed in technical civilisation and modern life strengthen, as they form the basis of our existence. Without them, our lives would be bleak. To continue a quality life,

it would be necessary to develop a value system in which material and spiritual values are in balance.

PARTIAL DESCRIPTION OF THE VALUE ORIENTATION OF ROMANIAN AND HUNGARIAN YOUTH BASED ON VARIOUS RESEARCH

Studies on the values of young people undertook to present the value preferences of different youth groups. One of the directions of value system research explains the change of values with modernisation theories. In traditional societies, a unified set of values is based on hierarchies corresponding to the same needs or societies, a belief in the superiority of religious explanation, and common truths known to all. In contrast, modernity is based primarily on rationality, science, distinguishing three basic values: the systems of traditional, modern, and postmodern values. We can usually hear about the values of young people in Hungary and Transylvania in the context of the youth era transition. BOGDAN VOICU (2001) interprets the development of the values of Romanian society in a modernisation paradigm. *Bogdan Voicu's* theory of fake modernity is formulated based on the 1999 European Value Survey. Romania is a culturally partially modernised society that is continuously struggling with financial problems, but at the same time, it also has connections with postmodern cultures. It is a dream-modern society, characterised mainly by tense modernisation efforts, with constant fluctuations between traditionality and postmodernity.

As a result of contact with different cultures, postmodern elements are introduced into Romanian society's values. BOGDAN VOICU (2001) enumerates elements of *postmodern value orientations*, the low level of which proves that these values are not a direct consequence of the level of socio-economic development of Romanian society (as described by Inglehart in connection with Western societies), but only Western results of contact with the world. Regarding the orientation of Romanian society, we emphasise the authority of religious explanation in the first place. It reaches its highest value in Europe here. According to Voicu, this lies in the fact that the church, as an institution embodying social stability and individual security, lives in people's consciousness, so religious values are paramount. Regarding the attitude towards risk-taking, it can be said that Romania has the lowest measured values.

Given *the younger generation's values*, VOICU (2001) noted that there are significant differences between Romanian and Hungarian youth. At the very beginning of the value ranking are the values of family, security, and the private sphere. We can see a significant difference in religion and self-realisation. Considering Voicu's claim that *the authority of religious explanation* among the Romanian population is exceptionally high compared to other European countries, it is not surprising that faith in God is the second most important value for Romanian youth. The authority of religious explanation among the Romanian population is extremely high compared to other European countries. However, this is not surprising, as data from 1999 show that not only the adult population but an average of two-thirds of young people believe that the church offers appropriate answers to an individual's various moral and family problems. Simultaneously, while in the case of Romanian youth, self-realisation also came first, in

Hungarian youth, the values of stability, peace, and prosperity proved to be more important (VOICU 2001).

There is also a difference in the value of *tolerance*, as Hungarian young people, without exception, are more tolerant than Romanian young people in all respects. This degree of tolerance, different from that of Romanian youth, results from a minority interpretation of the situation rather than a postmodern value orientation. This is also confirmed by the fact that the level of tolerance in the case of Hungarians varies from historical region to region, i.e., in Szeklerland, which is more ethnically homogeneous, the rate of accepting answers is much lower than in inner Transylvania or Partium.

Concern for the protection of the environment is typical of highly educated middle-class young people living in urban environments, both in the case of young people of Hungarian and Romanian nationality. However, compared to other European countries, the concern for protecting the environment is relatively low in Romania.

Post-material value adjustment is most characteristic of the youth's early stages compared to the adult population's value adjustment. Postmaterial values are fundamentally characteristic of young age groups, but the majority can be characterised by a mixed version of the two extreme value systems.

The 15-24 age group of the Romanian population can be called the most post-materialist. Young people aged 25-34 are more likely to be of the mixed value system. The population of Romania is essentially materialist, *post-material value-orientation* is more characteristic of the early stages of youth, and the completion of studies entails varying degrees of independence, which shifts value preferences towards materialism (VOICU 2001).

The Minority Research Institute of the Minoritas Foundation conducted a questionnaire survey (October and November 2000) on a nationally representative sample of 3253 final year high school students (high school students and vocational high school students).

They tried to find out the following:

- “The social and economic situation of the students, their school conditions; and their knowledge, opportunities, and tools for mobility and modern communication (special lessons, language skills, use of internet and e-mail, driving license and credit card)”,
- students' vision, personal life strategy for further learning and future work,
- young people's perceptions of current international relations and their future development,
- students' personal relationship with politics,
- young people's values concerning society's functioning, the practice of law, everyday life, the nation, minorities, different youth cultures, and life goals.

The comparative study tried to map the vision, work, and success of students in *Hungary* and Romania, as well as the way in which family and school influence their ideas about their future and what values guide them.

It was found that students think of their own social status as being around the social average in both countries. The values of privacy, money, and friendship are paramount in both countries. Religion, on the other hand, is more important to Romanian students. There is virtually

no difference in students' values in the two countries between freedom, leisure, entertainment, property, fame, the arts, and political ranks. It was also read that when students think about their future, they do not seek responsibility or the social usefulness of their work. They prefer the material benefits, the interest and good atmosphere of the work, and the work's safety.

There is no notable difference in the ranking of preferences between high school students and vocational high school students, as well as those attending theoretical and technical high schools. Examining young people's perceptions of success and expectations about their future, they concluded that both countries are characterised by optimism rather than disappointment or lack of perspective.

The social background of secondary school students in Romania and Hungary is more favourable than average in terms of their parents' educational level and the equipment of their homes. On the other hand, students in Hungary are more satisfied with the development of their lives so far than students in Romania (ÖRKÉNY – SZABÓ 1997).

The value orientations of the Hungarian youth in Transylvania are presented in the MOZAIK 2001 research, the aim of which is to examine the value system of the young Hungarian population (15-29 years old) in Transylvania. Concerning participation in the *civil sphere*, we can say based on the MOZAIK 2001 research that Hungarian young people in Transylvania were much more members of a non-governmental organisation (e.g., political, youth, church organisations) than Romanian young people in Transylvania. Although Romania's entire population is characterised by moderate *political interest* and relatively low *public participation*, significant differences can be observed among Hungarian and Romanian youth. In the case of Hungarian young people, the values of human and freedom rights and equal opportunities occupy a better place in the rankings than in the case of Romanian young people. However, they are much less interested in politics than their Romanian counterparts. The number of those who do not consider politics important at all has increased significantly in recent years (CSATA – MAGYARI – VERES 2002).

Later, in 2008, based on quantitative surveys conducted by the National Youth Authority (ANT) and the National Minority Research Institute (ISPMN), tried to answer the extent to which the values of Hungarian and Romanian young people in Romania follow the trends typical of adult society. Romanian and Hungarian native speakers of youth research took part in the study. The scope of the Youth 2008 survey covered 16 counties of Romania: Arad, Bistrița-Năsăud, Bihor, Brașov, Alba, Harghita, Cluj, Covasna, Caraș-Severin, Mureș, Maramureș, Satu Mare, Sibiu, Sălaj, Timișoara counties. The aim of the analysis is to capture the differences in the value attitudes of Romanian and Hungarian young people. They examined the quality of life of young people, their financial situation, the problems of young people, starting a family, having children, planning for the future, and values.

Comparing with MOZAIK 2001, for example, measuring the quality of life and financial situation, it turns out that in the seven years between 2001 and 2008, there was a real consumer expansion among both Romanians and Hungarians. Most of the young Hungarians (91.6 per cent) had a mobile phone and 63 per cent a personal computer. If we compare the data with the ANSIT 2008 measurement, it turns out that Hungarian young people did not lag behind their Romanian counterparts in terms of their financial situation. They own mobile phones and

computers in equal proportions. The proportion of those with a mobile phone among those aged 18-29 rose to 94 per cent, while those with a computer jumped to 71 per cent. Their spread is partly attributable to technical progress. In the case of the intention to work abroad, a much higher proportion of Hungarian young people have already worked abroad than the average in Romania and Transylvania. Compared to the 2001 survey, it turns out that the intention to work abroad has not decreased significantly. In 2001, 41 per cent of Hungarian youth and in 2008, 38 per cent wanted to work abroad (LADÁNYI – SZELÉNYI 2006).

Further research includes a study summarising the results of a large-sample (8,000 people) youth research conducted in 2012, which also provides a comprehensive picture of Hungarian 15-29-year-olds, and an analysis made in 2016. It includes an autonomous interpretation of data from 15-29-year-olds. The volume, prepared in 2016, reviews aspects of demographic structure, family origin, family formation and childbearing, education and labour market status and life path (LEVENTE SZÉKELY 2012, 2016).

In summary, we can discuss value coexistence (post-material, material, and traditional value attitudes) in the case of both the Romanian and the young Hungarian population.

There is a widespread perception in the public consciousness that education's importance is the transmission of values. However, there is growing uncertainty as to what values we create or transmit through education. An individual's value system can be perceived in his or her lifestyle, which determines his or her relationship to the world, which can be reflected in the individual's norms of behaviour, actions, and moral rules he or she follows. The system of values forms a complex unit, but mixed, fragmented values appear in society in many cases. Therefore, material, adventurous, exciting life, trying new, various things are especially important for young people, and it is less important to follow the rules, humility, modesty, rather individualistic values emerge.

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Navigating the Complexities of Caring for Children with Special Needs: The Experiences and Challenges of Foster Parents in Hungary



ABSTRACT

This study delves into the multifaceted challenges encountered by foster parents in Hungary who provide care for children with special needs. Drawing upon data from a comprehensive survey conducted among foster parents in 2022, the research illuminates the intricacies of providing adequate care and support for children with physical, mental, or behavioral disabilities within the context of the foster care system. The findings underscore the pressing need for enhanced financial assistance, improved access to specialist care, and strengthened collaboration between foster parents and professionals to safeguard the well-being and development of these vulnerable children. Through a sociological and philosophical lens, this study explores the broader implications of these challenges on the foster care system and society as a whole.

KEYWORDS

Keywords: vulnerable youth, foster care, child protection

DOI 10.14232/belv.2024.1.13

<https://doi.org/10.14232/belv.2024.1.13>

Cikkre való hivatkozás / How to cite this article:

Pávai, Jenő (2024): A brief description of the value term and some value tests, considering the pre-and post-millennium value orientation of Romanian and Hungarian youth. *Belvedere*

Meridionale vol. 36. no. 1. pp 189–194.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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INTRODUCTION

The foster care system serves as a vital safety net for children who have been removed from their biological families due to various circumstances, providing them with a nurturing and supportive family environment (Dozier et al., 2014). Within this context, children with special needs represent a particularly vulnerable subgroup, requiring specialized care and attention to address their unique physical, mental, or behavioral challenges (Lauver, 2008, Jancsák 2013, Sánta 2016). This study aims to shed light on the experiences of foster parents in Hungary who have taken on the responsibility of caring for children with special needs, focusing on the multifaceted challenges they face and the support mechanisms available to them. By examining these experiences through a sociological and philosophical lens, this research seeks to contribute to a deeper understanding of the complexities inherent in the foster care system and the broader societal implications of caring for children with special needs.

THEORETICAL FRAMEWORK

This study is grounded in the ecological systems theory proposed by Bronfenbrenner (1979), which emphasizes the importance of understanding individuals within the context of their environment. According to this theory, the development and well-being of children are influenced by the interplay of various systems, including the microsystem (immediate family and caregivers), mesosystem (interactions between different microsystems), exosystem (indirect influences such as community resources), and macrosystem (broader societal and cultural factors) (Bronfenbrenner, 1979). By applying this theoretical framework to the experiences of foster parents caring for children with special needs, we can gain a more comprehensive understanding of the challenges they face and the support they require at different levels of the ecological system.

RESEARCH METHODS

The study draws upon data from a survey titled “Foster Parents 2022” (Kothencz 2022) conducted among foster parents in Hungary. The survey included a range of questions pertaining to the experiences of caring for children with special needs, encompassing physical disabilities,

chronic illnesses, and severe psychological or behavioral problems. The sample consisted of 1,259 foster parents, representative of the foster parent population in Hungary. The data were analyzed using both quantitative and qualitative methods to provide a nuanced understanding of the challenges faced by foster parents and the support they require.

KEY FINDINGS

Prevalence of special needs: The survey revealed that 14% of foster parents reported caring for children with severe psychological or behavioral issues, while 26.2% cared for children with chronic illnesses or disabilities. These figures highlight the significant proportion of children with special needs within the foster care system and the consequent demands placed on foster parents.

CHALLENGES FACED BY FOSTER PARENTS

- a) **Increased workload and emotional strain:** Caring for children with special needs often requires additional time, effort, and emotional investment from foster parents. The survey findings indicated that foster parents experienced heightened levels of stress and burnout due to the intense demands of providing specialized care (Farmer et al., 2005).
- b) **Limited financial resources to meet special needs:** Foster parents reported struggling with the financial burden of meeting the unique needs of children with disabilities or chronic illnesses. The additional costs associated with medical treatments, therapies, and specialized equipment placed a significant strain on foster families' resources (Swanke et al., 2016).
- c) **Lack of an accepting social environment:** Foster parents highlighted the challenges they faced in terms of social stigma and lack of understanding from their extended family, friends, and the broader community regarding the needs of children with disabilities (Starr & Foy, 2012). This lack of social support and acceptance further compounded the difficulties experienced by foster parents.
- d) **Insufficient access to specialist care and educational facilities:** The survey findings revealed that foster parents often struggled to access appropriate healthcare services, therapeutic interventions, and educational support for children with special needs. The lack of coordination between different service providers and the limited availability of specialized resources posed significant barriers to ensuring the optimal development and well-being of these children (Lauver, 2008).

SUPPORT REQUIRED

- a) **Enhanced cooperation with healthcare professionals, special educators, and psychologists:** Foster parents emphasized the crucial importance of establishing strong

collaborative relationships with professionals who have expertise in working with children with special needs. Regular communication, joint planning, and coordinated efforts between foster parents and specialists were identified as key factors in providing effective care and support.

- b) Additional financial assistance for therapy, medical aids, and developmental tools: The study highlighted the need for increased financial support to help foster parents meet the unique needs of children with disabilities or chronic illnesses. Participants stressed the importance of having access to funding for specialized therapies, medical equipment, and educational resources to promote the optimal development and well-being of these children (Swanke et al., 2016).
- c) Increased psychological support for foster parents and children: The emotional toll of caring for children with special needs was a prominent theme in the survey findings. Foster parents expressed the need for readily available psychological support services to help them cope with the challenges they faced and to promote the mental health and resilience of both themselves and the children in their care (Orme & Buehler, 2001).

DISCUSSION

The findings of this study underscore the multifaceted nature of the challenges encountered by foster parents caring for children with special needs in Hungary. The increased workload, emotional strain, and financial burden highlighted by the participants reflect the complex demands placed on foster families in providing specialized care. These challenges are further compounded by the lack of an accepting social environment and insufficient access to appropriate healthcare and educational services.

From a sociological perspective, these findings illuminate the ways in which the foster care system is embedded within broader societal structures and influenced by prevailing cultural attitudes towards disability (Siebers, 2008). The stigma and lack of understanding faced by foster parents and children with special needs reflect the need for greater societal awareness and acceptance of disability as a natural part of human diversity (Barnes & Mercer, 2010).

Moreover, the challenges identified in this study raise important questions about the adequacy of support provided to foster families caring for children with special needs. The ecological systems theory emphasizes the importance of considering the multiple levels of influence on child development and well-being (Bronfenbrenner, 1979). The findings suggest that there are significant gaps in the support available to foster parents at the microsystem, mesosystem, and exosystem levels, indicating a need for more comprehensive and coordinated efforts to address the unique needs of this population.

From a philosophical standpoint, the experiences of foster parents caring for children with special needs prompt us to reflect on the fundamental values and ethical obligations of society towards its most vulnerable members. The principle of social justice requires that all children, regardless of their abilities or circumstances, have access to the resources and support necessary for their optimal development and well-being (Rawls, 1971). The challenges faced by foster parents in meeting the needs of children with disabilities or chronic illnesses highlight the need

for a more equitable distribution of resources and support within the foster care system and society as a whole.

CONCLUSION

This study provides valuable insights into the experiences and challenges of foster parents caring for children with special needs in Hungary. The findings underscore the complexity of providing specialized care within the context of the foster care system and the broader societal factors that shape these experiences. The increased workload, emotional strain, financial burden, and lack of social support and access to appropriate services identified by foster parents highlight the urgent need for more comprehensive and coordinated efforts to support this vulnerable population.

By examining these challenges through a sociological and philosophical lens, this study contributes to a deeper understanding of the ways in which the foster care system is embedded within broader societal structures and the ethical obligations of society towards its most vulnerable members. The findings emphasize the importance of promoting greater societal awareness and acceptance of disability, as well as the need for more equitable distribution of resources and support to ensure the optimal development and well-being of all children, regardless of their abilities or circumstances.

Moving forward, it is crucial that policymakers, practitioners, and researchers work together to address the challenges identified in this study and to develop more effective strategies for supporting foster parents and children with special needs. This requires a holistic approach that takes into account the multiple levels of influence on child development and well-being, as well as the broader societal factors that shape the experiences of this vulnerable population. By prioritizing the needs and rights of children with disabilities and chronic illnesses, and by providing foster parents with the resources and support they need to provide high-quality care, we can work towards creating a more just and inclusive society for all.

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Perseverance of eurowhiteness. Review

On the book: KUNDNANI, HANS (2023): *Eurowhiteness. Culture, Empire and Race in the European Project*. London, Hurst & Company.



DOI 10.14232/belv.2024.1.14

<https://doi.org/10.14232/belv.2024.1.14>

Cikkre való hivatkozás / How to cite this article:

Losoncz, Alpár (2024): Perseverance of eurowhiteness. Review. *Belvedere Meridionale* vol. 36. no. 1. pp 195–202.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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Europe and its particular institutional expression, namely the European Union, have once again come to the fore. This has happened after various interpretations of European Union, which has long been the subject of even university studies. Of course, increasingly intensive and noticeable, interdisciplinary European studies have significantly contributed to profiling the dynamics of Europe in recent decades. However, the eruption of the crisis (2007/2008), the pandemic and especially the Russian-Ukrainian war, gave a new impetus to the reflection of Europe, which, due to its indeterminacy, obviously represents an inexhaustible hermeneutic subject.

The shaken stability of Europe, fierce competition between the USA and China attitude regarding hegemony, the weakening of Germany as a flawless economic machine that

simultaneously determines the framework of European foreign policy, the possibilities and scope of green transformation (that Europe has high ambitions for) in a constellation where even the Chinese have started with indigenous changes and when the post-Trump, Biden USA also declared its own Green New Deal, intensified technological competition in the field of AI, and military Keynesianism with burning interest in the affirmation of the arms industry – these are the elements in short which characterize the situation in which Europe should reconstitute itself.

Inferiority of the European Union, uncertainty regarding the formulation and presentation of its strategic interests in a period marked by transitoryness, discomfort in the constellation when the elements of security policy are rapidly changing, provoke attempts to re-understand Europe. Undoubtedly, the fluidity of modernity is manifested in the fact that we are always in a state of transition, but it cannot be denied that the current situation is fraught with tendencies that penetrate deeper into the structural determinations of society than earlier crisis situations.

We have heard various criticisms of both Europe and its self-idealization that traditionally belongs to it (Kundnani is not a pioneer but a successor). And this, of course, should not be considered as extraordinary: the fact that the actors of world politics ideologize their performance, that there is, for example, the self-ideologization of the messianic-liberal USA and its corporatist elites is not something new. Just as it is no surprise that ideology functions in the form of self-rationalization, that it creates a series of blind spots and tacit assumptions regarding the one who practices the ideology in question. Even the way European Union perceives itself, its practice of „soft” power, is not a form of some developed uniqueness. In this way, she just joins the other actors on the world scene where everyone perceives themselves as the bearer of something special/unique. No actor thinks that he implements an ideological matrix that he himself practices a certain ideology, and with that he tries to present answers to the questions of particularity and universality.

Therefore, the only question is the *modus* of self-idealization of Europe led by the European Union, that is, its institutional apparatus. And *Eurowhiteness*...should be considered within this context. It is written by a man whose father is Indian and whose mother is Dutch: of course, identity (regardless of the type) is not an a priori guarantee of acumen, but at the same time it is an opportunity to see relevant aspects. Kundnani has to accept some already expressed criticisms towards Europe, but he processes them giving us an original and robust approach to European problems. There are also some moments of the genesis of the EU in the book (this is inevitable), but the point is still in a conceptual covering, that is, a critical articulation of European self-understanding.

The European project manifests the ambitions of consistent anti-particularism. That is, cosmopolitanism and intentional anti-nationalism belong to the EU's self-definition. The characteristics that describe it are „diversity, inclusion and openness”. The author of this book, however, shows that there is a „Eurocentric fallacy”, that is, the EU realizes a typical ideological gesture: despite its particularity, established borders, and „closedness” projects itself as „debordered”, that is, it represents its „normative power” as a genuine representative of universality. The criticism of the cosmopolitan discourse of Jürgen Habermas and Ulrich Beck (and others) develops in the sense that the EU is constantly sliding into a dichotomization in which the EU appears as the most consistent institutional form, that is, as a pattern of anti-nationalism.

Kundnani believes that the EU should not be seen as the finalization of anti-nationalist normativity, or as a teleology of anti-nationalism, but as an expression of regional logic or a

particularistic discourse. The EU, as regionalism, is not on the opposite side of the logic of the creation of nationalism, but develops just as the dynamics of the nationalism. Hannah Arendt is one of the important witnesses of this. However, the ongoing dialectic of inclusiveness and „exclusivity” proves this: the expansion of EU aims at expanding inclusiveness, but at the same time, the EU remains a proponent of exclusivity in relation to the „outside” world. Kundnani’s provocative idea, which he draws both implicitly and explicitly through the argumentation, is that „far right tropes” are hidden behind European normativism. One of Kundnani’s examples is that during covid-19, the EU criticized France and Germany, which implemented intra-European restrictions against the country that was severely affected by the pandemic, but it enthroned restrictive measures against certain *non*-European countries. Furthermore, Germany as the EU Presidency (2020) promoted almost the same slogan as the often criticized and hated Donald Trump: „Making Europe strong again together”.

Following this, the author analyzes the well-known distinction between ethnic and civil nationalism by Hans Kohn, although it is quite clear to him that the normative hierarchization between these forms of nationalism is inadequate. His idea is that the same distinction *ad analogiam* can be applied in relation to regionalism. Accordingly, one can talk about civil and cultural (European) regionalism taking into account the fact that even here possible hierarchization should be eliminated and the genesis and institutional infrastructure of the EU should be observed as a dynamic synthesis between the elements of ethnic/cultural and civil regionalism. Of course, EU ideology considers only the civilian dimensions of its own model, but the reality is much more complex. Finally, our vision is not sharpened even if the EU is understood as an expression of some imaginary European „destiny”; this term belonging to the pre-modern repertoire of terms, systematically deforms the processes of identity development of Europe.

The described regionalism as a combination of ethnic/cultural and civil ingredients can speak much better about the formation of identity in Europe, because the standard forms for Kundnani are reductive and are based on „linearity”. In fact, in accordance with the fact that European regionalism is built analogously to nationalism, the identity of Europe can also be understood on the basis of differentiation from others: of course, here it is only evident that self-identity is impossible without Others. However, the idealistic understanding of „European universalism” (Wallerstein) hides this moment, which is otherwise standard in the analysis of identity.

Furthermore, the analogical usage of the term civil/ethnoregionalism allows the author to deal with too quickly derived dualities such as „liberalism and illiberalism” or „globalism and nationalism”. The deconstructive tone hits particularly the frequently used phrase, namely „national populism”, which was commonly used as a universal negative assessment, an a priori derived condemnation of deviance – despite the deep contradiction of that term and the certain emptiness that determines it.

Kundnani is particularly interested to explain the discourse of the far right in Europe –with an indication that, due to the deficit, the canonized European discourse does not at all understand how the logic of the same orientation develops. Obviously, he thinks that recognizing the discourse of the far right is not only a particular problem, but hits the very essence of the EU’s self-ideologization. And the main point of the book is that the European project has made an transformation in the last decade („pro-Europeans” are especially apostrophized here; Kundnani consistently puts the term in question in quotation marks, emphasizing that it is a standardized

trope) and, under the influence of various tendencies, has reached the situation of „defensive civilizationism”. The author of this book attributes a significant role to the concept of „civilization” (we often remember the infamous distinction between civilization and culture), it appears in different contexts in the text („*mission civilisatrice*”, e.g. what characterizes the European mythical self-interpretation).

Kundnani turns to another dimension to prove the mentioned viewpoint, namely, the dimension of memory in the genesis of Europe with its geographical and Christian elements. More precisely, Kundnani’s effort to problematize the past of Europe in the perspective of that moment that cannot be avoided is revealed here as it flows into the present, namely, in the perspective of race. Finally, we should not forget that the very name of this book refers to race.

The project of Europe is also a project of „memory”, that is, the creation of a community based on the past. In other words, the problem of Europe’s relationship with its past emerges here, which is important for the consideration of its identity. Europe experienced two world wars on its soil in the 20th century, and many designers of Europe define the post-war situation as the beginning. However, European frameworks existed before, and they can be seen as a movement from religious to racial constellations. That is, European self-definition is imbued with elements of racial concept and its „whiteness” strategy, and it is an organic part of European self-differentiation.

Kundnani has to argue with „Pro-Europeans” who reject the importance of race for today’s self-interpretation of Europe and refer to the original Enlightenment literature of Kant and others, which was consistently universalist in intent. In other words, he is receptive to all those attitudes that warn that the Enlightenment has not thrown off the deposits of racial discourse, that colonialization is not just another unfortunate sequence in the history of Europe. Accordingly, he widely receives earlier criticisms (Frantz Fanon, etc.) against „European universalism”, which emphasize what the already mentioned Immanuel Wallerstein emphasized, namely, that it is the medium of „rhetoric of power”.

The aftermath of World War II marked a departure from the past, characterized by dark dimensions. It began with a vision aligned with Kant’s universal/eternal peace: by learning lessons from two world wars, and stabilizing relations among key states such as Germany and France, the war was considered to be victorious, at least on European soil. Europe has learned its lesson although the past few decades show disruptions in this attitude, for example, the conflicts in the former Yugoslavia, or the ongoing war between Russia and Ukraine. However, post-war Europe, with its acquired catharsis, externalized wars: it was not thought that war would disappear as a whole, but that it would be relocated to those fields of the world that had not yet accepted the constitutive aspects of European „normativism”.

Kundnani rejects the viewpoints that, according to the already recognized binary logic, drew a strong demarcation line between the emerging EU and colonialism. On the contrary, the Europe in question, during the genesis of the EU, exhibited tendencies reminiscent of colonialism. We should not indeed forget that post-war Europe (or its key countries) wants to keep colonialist matrices and develop political autonomy, the aforementioned civilizing mission characterized by mentorship and paternalism. In many of today’s interpretations, the concept of „Euroafrica” is often overlooked, as if it never existed: Kundnani has the right to remind us of this and illustrates the interweaving of the original European project in the continuation of colonialism using different means. The claim that

the prospect of the continuity of colonialism played a vital motivational role in European integration is not exaggerated at all. The sublimity of the EU, with its proclaimed anti-nationalism extending beyond the 'pathological' dimensions of nationalism, explains at least one of these underlying motives.

Kundani is, therefore, right in highlighting the 'colonial origins' of the EU; even then he diverges from Alan Millward's well-known perspective that the EU was formed to save deteriorating nation-states, and he presents the thesis that the birth of the EU is a sign of the renewal of European „imperialism". Here we must return to the phenomenon of Europe as a „civilizational" project. While Kundnani does not search through the semantics of this term, scholars in the social sciences starting from Max Scheler to Norbert Elias, have extensively explored it. Civilization, which is much more than a mere term, is also a carrier of differentiation; through it, Europe not only establishes itself but distinguishes itself from others ('othering'). However, it is most important for the author of the book to connect only those meanings that explain the persistence of the EU on civilizational determinism.

We start here with the promotion of Europe as a Christian civilizational project; Winston Churchill said it, moreover, declared it immediately after the war. The Christian Democrats play an important role in promoting the modernization of Christianity as an authentic post-fascist orientation. Within the European framework, the concept of social market economy and welfare state is introduced (remember the different determinations that emphasized the uniqueness of Europe compared to the USA precisely on the basis of this aspect) with the aim of mitigating class conflicts in the then Fordist capitalism – although Kundnani stresses that the same concept was initially shaped in national states, the EU only adopted the concepts in question only in its rhetoric. Attributing the welfare state to European instances leads us astray.

Following the above-mentioned distinctions, if we could say that the EU represented itself as „civil regionalism" (although even this characterization is a critical expression; we could even talk about civil universalism), then the development of the EU can be observed as continuous hybridity between ethnic and civil regionalism. The balance is impossible to achieve. Kundnani claims that civil regionalism is the intention of the Europeans, yet it has always been framed in the context of such elements when the 'civility' in question could not be consistently performed. The lack of success in North African countries' attempts to join the EU is no coincidence; The EU maintained European particularity despite advocating for civil universalism.

Notably, Kundnani finds it appropriate to highlight the difference between the EU and Europe at one point. In the post-war context, Europe defined itself in opposition to war, with the memory of the war serving as an integrative factor. However, as the probability of peaceful relations between Germany and France increased, the motive in question weakened, and instead 'Europe' was more emphasized than the 'EU'. This important nuance, i.e. differentiating the significance of Europe versus the EU reveals much about the self-interpretation of European actors.

Regarding the significance of memory, Kundnani highlights the growing importance of attitudes towards the Holocaust in the 1960s. The integration of this profiled memory was, of course, influenced by the West German performance. Nevertheless, Kundnani argues that the memory of the catastrophic events of the Holocaust expanded even beyond the framework of European interpretations. In this regard, he accepts the position that the memory of the industrialized extermination of the Jews is actually as much a constituent element of the constitutional

structure of Europe as its civilizing mission. The Holocaust serves as an incentive for moral reflexivity and forms the foundation of the European anti-war project, which should civilize not only Europe but the entire world.

However, Kundnani notes that the same memory is linked with a certain selection regarding the past – but the concept of Europe as a 'community of memory' involves the suppression of its colonial history. More precisely, the Holocaust as a channel for memory is represented as a unique sequence of history, and the connection between certain aspects of modernity, colonialism and the Holocaust is lost – Hannah Arendt again emerged as a key witness. Consequently, polemics is opened here again with 'Pro-Europeans' attempting to widen the gap between the European project and racism, and claiming that a strengthened Europe embodies anti-racism. European officials, in their historical reflections, emphasize intra-European atrocities, but subconsciously relegate the externalization of European violence. As Kundnani states: the European project has entered a state of „imperial amnesia”.

Kundnani also discovers other traces of unrecognized European particularity. What is the background of this is the belief that the European project is not just a finalization of peace, grounded only in the recollection of horrors of war, instead, it is more of an institutional realization of an imagined 'civilizing mission' that seeks to influence and convert the world. This civilizational intention is also manifested during the so-called expansion phase, particularly during the creation of a single market where search engine elements operate *in potentia* without any restrictions.

This is where Kundnani's narrative on the neoliberalization of Europe unfolds. His important observation is that the market-driven modeling of Europe coincided with the emphasis on the concept of 'value' which has the function of balancing the nihilistic aspects of the market and emphasizing the qualitative-substantive determination of Europe. Kundnani's reflections on the inevitable conflict between post-authoritative European engagement and civilizational intentions, as well as his statement that neoliberalization, perhaps carried out with the intention of framing it with authentic 'value' patterns, is linked with an excess of technocratism and a lack of democracy, are not new. However, they complement the argumentation well. In addition, neoliberalization suppressed the previously mentioned engagement concerning the social market economy, leaving it in only rudimentary forms.

This provides perspective regarding the accession of Central and Eastern European countries to which Kundnani focuses his attention in his analysis concerning the EU's civilization expansion. Notably, the interplay between openness and closedness is evident here again: the EU opened up to the East, complying with its civilizational goals, but remained closed to the South. The EU has monopolized the interpretation of Europe by integrating the mentioned countries (in other words, the states of the former real-socialist bloc), emphasizing that it transcends geographical constraints, implying that the era of geopolitics that summarizes numerous dark moments of territorial ambitions and unbridled power ambitions, belonged to the past. In contrast, Kundnani identifies a „geopoliticized” Europe¹ that still believes to be the privileged bearer of soft universalism but adheres to the geopolitical logic of competition and rivalry. The inhabitants of the former real-socialist countries with the Soviet stamp were led to believe that they had returned to the homeland of Europe, but as the above-mentioned shows, they found

¹ Hans Kundnani, Europe's Geopolitical Confusion, <https://ip-quarterly.com/en/europes-geopolitical-confusion>.

themselves in an ambiguous framework and must ideologize in order to suppress elements conflicting with its normative purity. Notably, unlike Westerners, these inhabitants of Central and Eastern Europe have never had a colonialist past, which causes a series of misunderstandings. This does not sterilize their past: after all, they have also had civilizational fantasies like their Western counterparts: it only emphasizes the historical divergences that were often overlooked.

The exclusivity is that the notion 'Eurowhiteness' (let's not forget that it is a term introduced by József Böröcz) employed in the definition of institutionalized Europe does not deny that there are moments of inclusiveness in its fabric (Kundnani follows the migration of foreign workers within and outside Europe, examining how the same processes changed the frameworks), but emphasizes the background fact that has been overshadowed by ideological practices. The missionary spirit, evident in the implementation of the norms of civilization and the epoch-making intention of 'civilizing international politics' tends to obscure the view concerning opportunism and the lack of commonality in the field of European foreign policy.

Even the EU, viewing the integration of respective countries as an expression of extraordinary success, thought that this was a paradigm with the potential to be expanded. Kundnani observes the growing significance of the concept of civilization in the European discourse in the second decade of the 21st century. He identifies this period as the emergence of a 'defensive Europe', which becomes insecure due to intensified migration processes and caught in the stark division between 'pro-European' centrism and 'eurosceptical populism'. In addition, the already disrupted balance between ethnic/cultural and civil regionalism was further affected and the pendulum shifted towards the importance of ethnic elements. Kundnani critically asserts that whiteness is playing an increasingly significant role in redesigning the European project – to be clear, he does not attribute this to the alleged 'populist aspirations' promoting an anti-European *Stimmung*. In essence: Kundnani aims to highlight the convergence between Angela Merkel and Viktor Orbán rather than their divergence.

A significant aspect is that Europe maintains civilizational ambitions but is gradually losing confidence in presenting itself as a 'model'. According to Kundnani, it slips into the position of a 'competitor', which is less than a 'model'. Accordingly, various political and economic events in Europe, including the war in Ukraine, are examined and lead us to the present day. This way, he has only strengthened the image of a geopoliticized Europe that has its own civilization reservoir which is being dried up as a paradigm.

Kundnani dedicates a specific section to Brexit, which is also a personal challenge for him. In fact, Brexit serves as a case study testing the conceptual statements presented so far. This section also extends the criticism of 'centrist post-Europeans'. There have been different interpretations of Brexit. Although Kundnani has advocated for the UK to remain in the EU, he presents Brexit as an 'opportunity' and 'possibility' emerging from the results of the referendum. He accepts the conclusion (Paul Gilroy's) regarding the failure of the UK to process the loss of its empire and contends that the EU membership has only intensified the consequences of avoiding this acknowledged loss. Therefore, his argument suggests that the post-Brexit scenario could help the UK to escape the inherited Eurocentrism.

Kundnani's relevant book on the effects of demystification contains a variety of interpretive approaches featuring both polemics and positive receptions from different authors. It is a book that leads to many directions offering provocative perspectives on European self-interpretation.

The criticism of such non-reflexive concepts as „national populism” and critical articulation of the ideological foundations of the conceptual framework effectively clear the analytical ground for understanding the EU.

I can notice that the description of neoliberalization, along with some contextual descriptions, somewhat lacks depth in addressing the determinants of capitalism in Europe. I do not dispute that these descriptions are authoritative; I even believe that without them the argumentation of the book would be insufficient. However, the persistence of colonialism, 'neoliberal cosmopolitanism' or the redefinition of welfare, and the 2007/2008 crisis require an explanation that goes into the dynamics of capitalism. It would be interesting to explore how diverse ideological trends such as competitive ordoliberalism and French dirigism contributed to the perpetuation of Eurowhiteness.

This, however, does not question the importance of the book in enhancing European self-understanding.

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Opinion.

They have separated “real science” and faith – but found no answer to the main question



ABSTRACT

Recently an addition to Charles Darwin's theory of evolution has received a considerable international publicity, titled: on the roles of function and selection in evolving systems.¹ „motion, gravity, electromagnetically charged fields, and the principle of interactions described by the second law of thermodynamics energize universal evolution,” they argue. but it is not quite clear why they did not start from an autopoietic theory that describes complex natural and social subsystems without contradiction? this would have the explanatory power to bridge the gaps in Darwin's theory of evolution in a more elegant way.

KEYWORDS

Autopoietic systems, Faith, Adaptation, Prolonged evolution, Depression, Reuptake, Self-healing.

DOI 10.14232/belv.2024.1.15

<https://doi.org/10.14232/belv.2024.1.15>

Cikkre való hivatkozás / How to cite this article:

Dombrádi, Krisztián (2024): They have separated “real science” and faith – but found no answer to the main question. *Belvedere Meridionale* vol. 36. no. 1. pp 203–211.

¹ MICHAEL L. WONG – CAROL E. CLELAND – DANIEL AREND JR. – STUART BARTLETT – H. JAMES CLEAVES II – HEATHER DEMAREST – ANIRUDH PRABHU – JONATHAN I. LUNINE – ROBERT M. HAZEN. (16. October 2023.) On the roles of function and selection in evolving systems. in: PROCEEDINGS OF THE NATIONAL ACADEMY OF SCIENCES. [HTTPS://WWW.PNAS.ORG/DOI/10.1073/PNAS.2310223120](https://www.pnas.org/doi/10.1073/pnas.2310223120)

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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Darwin's theory leaves to chance the emergence of new capacities essential for survival. These abilities prove their indispensability by being passed on by the living organism to future generations.²

The new theory of the history of origins and evolution has finally brought natural scientists, who had been studying the origin and evolution of life for centuries, out of their intellectual paralysis.

But this theory calls for patience as well. It takes us on a journey of individual evolution without letting us know how the world came about. Darwin's genius lies in the fact that, despite this pitfall, he describes a future vision of a self-functioning system. Children could draw the *homo sapiens* without any prior study. The idea of how species change was complemented by the idea of adaptation, which determined the direction and manner of change, simply and clearly. But not without consequences. Religion was juxtaposed with scientific thinking, atheism became synonymous with pragmatism knowing the real sciences – faith became a metaphor for ignorance.³

Faith is essential to understanding life born of dust and mud. Darwin was irrefutable for the creativity of his theory describing the process of individual evolution, yet some of his critics questioned his theory.⁴ How can a 'living' organism repel a frontal assault from the extremes of its environment?

For all the creativity of scientific atheism and evolutionary theory, they failed to describe the first moment of life's emergence, or even to provide insights into the boring daily routine of species adaptation. It also pushed 'real science' and faith, the science of the soul, as far apart from each other as possible. The description of the laws of nature remained incomplete – and this creative tenet of biology became a matter of faith.

We must start from nature's rules, its capacity for renewal and self-healing.⁵ We must presuppose the existence of all sensible substances and recognise their interdependence. The subsystems of nature and society have created for themselves an overarching rule that has determined not only the near future but also the unforeseeable on a human scale.

The evolution of man as an individual came to the centre of evolution because men sought the origins of human existence. Throughout his life, man has resolves countless contradictions. His conflicts may be emotional, existential or transcendental.

In reality, autopoietic systems⁶ that work well in theory already turn a blind eye to the contradictory nature of processes in every aspect of existence – which would defeat the very purpose

² OLDROYD 1986. 133–168.

³ LIVINGSTONE 2009. 348–369.

⁴ BEHE 1996. *Darwin's Black Box*.

⁵ CREMALDI – BHUSHAN 2018. 907–935.

⁶ GIDDENS 1984; LUHMANN 1995; MINGERS 2002, 2004a. 278–299.

of this holistic approach? Do we think that nature does not correct itself, that cells and communities cannot recover from a disease? We know this is not true!⁷ The living cell has this capacity. Nevertheless, this appealing theory has given a major role to natural knowledge produced in synchrony with man, which is an inseparable speciality because of its uniqueness.⁸

THIS IS BELIEF

The power of this personal end product lies in its uniqueness and intimacy. In modern society, religion is already a social subsystem, which is then so complex that a separate science, theology, has been built around it. Faith, of course, has also been forced to undergo one of man's devastating simplifications: it has been institutionalised over the centuries. It is now a religion, which continues to have elemental force because it is personal.⁹ A religious man may know the history of his faith, he may have already come across a written codex of one of the world religions, he may have read it, and even less often he may have quoted it. But this is not what determines the ability of his faith to heal the mind and body. The power of this personal end product lies in its uniqueness and intimacy, shaped by the demands of its physical and spiritual environment. In the collective process that has been going on since the ascension of man, and which has been completed in a single lifetime at a lightning speed, it becomes the most intimate inner creation of a believer. But it also holds other surprises.

Faith and religion are not identical; their sources are, but while faith is imperceptibly organic, the institutionalised, demonstrative, orthodox version of religious practice creates violence. both are inexplicable creations of the brain.

Religion, most people think, is a bridge. (The masses of modern society are alienated from religion by its bondage, callousness and poor sense of humour.) Religion and faith have become a controlling, healing, emotion-generating structure, completed and shaped to our own needs, still today, but almost certainly forever, unknowable from man's point of view.¹⁰ We do not know how it works, nor will we. Not because it is none of our business. To know it is not remote, but impossible and unjustifiable.

For centuries there has been a debate about whether people make decisions with their hearts or with their brains. At the infantile age of his development, the heart was still attributed this role, only because it sometimes had a rapid pulse or a labored breathing. This theorem has held for centuries. Only modern science has been able to 'disprove' it - at least in its belief. The arguments in favour of the brain's role in controlling the body's activity have been mounting.

In a layman's mind, it would be able to alleviate disease.¹¹ Take the example of depression, which can have many causes: external environmental, genetic, but also due to an imbalance in neurotransmitters.¹²

⁷ REYA et al. 2003. 423

⁸ ZELENY 2006; HALL 2005. 3.

⁹ BEYER 1998. 45. 1-29.

¹⁰ LEVIN 2009. 77-96.

¹¹ LUO - YU 2015. 6.

¹² BECK - ALFORD 2009.

In addition to the known neurological processes, the hormonal system also has an impact on the development of depression. The *sella turcica* is located in the dorsal fossa of the skull, the two lobes of which produce different hormones and perform different functions. The posterior lobe stores and secretes oxytocin (anti-anxiety and euphoric) and vasopressin, while the anterior lobe produces growth hormone and influences processes related to sexual function, metabolism and stress management. Pituitary function is influenced by higher nervous system centres, signals from the periphery, environmental influences, nutrition and stress.¹³

The antidepressants developed on the basis of this knowledge have been given a “complex” task: to block the escape route of serotonin, noradrenaline, dopamine (neurotransmitters, “chemical messengers”), which are responsible for mood changes, leaking back from the “synaptic cleft”.¹⁴

Drugs that block the killer protein slow down the reflux of neurotransmitters, delaying their “reuptake”. For the sake of accuracy, we should add that the breakdown enzymes affect the function of a protein responsible for the reuptake of dopamine and serotonin from the gap into the neuron (the molecule is not broken down, it is just recycled, in order to be secreted back into the gap later, to enhance the transmitter’s effect.)

The drugs take a week or two to prove whether they reduce the chances of developing depression. The drug closes the “synaptic gap”. But the brain, why does it not reduce the chance of depression developing, or dampen its power once it has developed? (As a reminder, the cause of depression is not just hormonal: genetic and environmental influences also contribute to its development.)¹⁵

Yet why doesn’t it narrow the “synaptic gap” on its own, without the administration of medication? Why not turn on its heels and slow down the reuptake? Researchers have come up with different solutions (SSRI, SNRI drug classes have been developed.) This has given a “helping hand” to a brain that does not seem to be up to the task.¹⁶

Remember, depression is a very complex symptom: the brain’s hormone production is far from being solely to blame for its development (humans are a fragile, power-hungry, closed organism, often unable to fight off attacks from the outside environment. Once in trouble, the wounded person can hardly accept even emotional help.)¹⁷ A closed ‘self-referential system’, which has been much discussed, can lose its vitality and even its faith. The link between depression and hormones was not superfluous, because the analogy between the legendary ‘autopoietic’ system, which is sensitive and responsive to the environment, and evolution is striking, but we do not understand: if evolution is a magic bullet, why do diseases exist, or how can depression, for example, develop? Which we may have been able to show: the organism could alleviate it, or reduce the chances of it developing, because it has evolutionary knowledge (belief, “master program”, whatever you want to call it) that was created at the same time as man, it has this experience.

If we adopt a holistic (autopoietic) view, where all events are closely causally linked, we can rule out the possibility that the brain and our hormone-producing, controlling organs are doing

¹³ VAN PRAAG 2004. 891–907.

¹⁴ DELGADO 2004. 25–34.

¹⁵ NESTLER 2002. 13–25.

¹⁶ BIRINGER et al. 2009; PIGOTT et al. 2010. 164–174.

¹⁷ BOAS et al. 2019.

their job wrong. They are doing what they are supposed to do. Doubtful, are we even investigating what is worth investigating? (Medical and biological science is now capable of correcting, in some cases, the errors of living things in the current state of evolution. Once recognized and learned.) The doctor heals the patient. It is also not true that there is no research on fundamental questions. But the relationship between the body and evolutionary knowledge (belief) is not understood, not researched. The question itself gives the appearance of ignorance. Even today.

Let us repeat: “We don’t understand because it is none of our business. Its knowledge is not remote, but impossible and unjustifiable.”

Faith is the most intimate special knowledge, born at the same time as man, personalized as a result of evolutionary development, which does not control hormone production – but induces important biochemical reactions.

(We know such a consequence of emotional waves, but we do not yet see deeper.) The name transcendent is also a misnomer, because it is not otherworldly, but immanent. Its existence and role cannot be questioned.

Why do the nerve cells not “knock out” depression by increasing the production of serotonin and noradrenaline?

This is the real dilemma. It would be a life-saver in the case of depression that triggers a chronic symptom complex. Let’s repeat. “Because there is no cause is our business. To know it is not only remote, but impossible and unjustifiable.”

Scientific thinking cannot be separated from faith, these two sciences have been artificially set in opposition to each other in order to protect the theory of evolution, although in fact they are inextricably linked, like a program to a means of production. They arose side by side, in synchrony. They are evolutionary products, relying on each other to do all they can to sustain human life and the viability of species.

If the physiological impact of these phenomenological mosaics of decisive force in Charles Darwin’s theory had been proven by basic research, if they were more than mere hunches (embedded in a logical system), the theory would have been stronger.

Acting in the living cell, or looking into the past, into the future, into the clear night sky: pondering the unmitigated force upon man and the earth, we understand: everything happens for a reason, and if we look beyond the narrow limits of our knowledge, even if we search blindly, we can plot the irregular elliptical orbit of a planet. Because we know the forces at work at a distance, the effects of which can be felt even here, close to the Earth. Man can see no further than this. You could say that’s not a small thing, but you’d be wrong. It is nothing. It’s pointless to design a space shuttle with nowhere to go.

“Save time and multiply your chances of living?” – the image of a spacecraft landing safely on a tail on a wobbly platform cannot give that illusion. Until the infinity of distance, the fact of perceived scientific inertia, is disproved by the same science - validly and adequately - we will increase our chances of living by repeating what we have.

The success of an individual’s evolution is also very much a function of time: the faster it takes for the most stable individual of a species to evolve, the less evolutionary pressure it is under; the greater its chances of survival.

If this process is prolonged to an extreme, the chances of this stable form evolving are reduced due to competition between species or environmental changes. It is likely that the chances

of species survival will be improved if a narrower spectrum is attempted. The success of the prolonged evolution of an infinite number of species over an infinite time, left to blind luck and chance, is almost impossible.

“Why did Darwin leave the renewal of species to pure chance?”

These inherent (inherited and acquired) knowledge are a programme to ensure the shortest possible scenario of adaptation. We now assume that the creation of new mutations across the stage boundaries of individual evolution takes place faster than we had imagined (through the evolutionary knowledge available in the brain). It is incomprehensible why Darwin left the renewal of species to pure chance. For this would stretch the evolution of the phylogeny to infinity, which would radically reduce the chances of improving the survival of species.

The knowledge, which is made up of intuitions, individual knowledge composed by collective and personal past, can be called “guiding faith”.

“Why don’t the nerve cells produce more dopamine, serotonin, if they could alleviate the suffering of the depressed patient? (It would not eliminate the complex underlying causes of his illness.)

The question can be answered without much effort. At first glance, the process of evolution seems very simple, so it has quickly become part of the public discourse.¹⁸ A comprehensive formula for change and natural processes. Its uniqueness and creativity made it an unpleasant and well-trained opponent.

We still haven’t answered the question. Why don’t the nerve cells immediately rush to the aid of the depressed patient with a little extra serotonin and dopamine production? Not because they are not programmed to do so, but to maintain species, not to cure individuals or correct diseases. Why did the revolutionary theory explain everything without being asked? It is because the proponents of scientific thought have forcibly extended its reach, public discourse has forced Darwin’s logic, and a creative scientific approach has been surrounded by a smaller obscurity, contrary to the scientist’s intention:

As an overarching explanation, it has become the dominant one in describing the interactions of man and nature. It is likely: Darwin did not design it for this purpose. Or he was considering: how much scientific creativity was needed to overturn his theory. Unpredictable. Then he let it go. His success was guaranteed.¹⁹

He was too successful! Let’s look at homo sapiens and his successors! First, man gathered some tree branches and set them on fire. A little later, on the time horizon of the Earth’s history: with his tail, he formed a vehicle landing on the waves of the waves, which, after leaving the planet’s atmosphere, lost power and returned, and thanks to the mastery of high mathematics, after many attempts, finally landed successfully in a revolutionary new position: with his tail. But why?

Surely the rocket doesn’t land back on its tail, because we think it doesn’t make sense. (If it does, there’s a big problem.) Obviously, this statement is disputed by many. These ideas are seemingly far apart, but they are part of the story of evolution.

The adaptive, self-healing capacity of the body is not inferior to that of the soul, which is open to all solutions, not for the individual but for the whole species, in the hope of a

¹⁸ FALK 1988; DENNETT 1995. 61–94.

¹⁹ MAYR 1991. 123–139.

predictable and potent future. It programs itself again and again. This knowledge community created (belief), participated in collective evolution, and was later institutionalized by humanity. Even the atheist does not deny, he feels some kind of faith (no wonder, since for him this knowledge is not transcendent, but immanent, this knowledge is this worldly). It is a program that has been living in the deep layers of bodies for thousands of years, changing. It is designed to guide.

Bad news. In the turbulence of a complex modern society, it is slowly unable to perform its task, nor to keep up with the pace, to switch to the tempo of modern society. It was not designed for that! It cannot put a substantially renewed programme into operation within a generation or two. In a turbulent world, it can correct the fluctuations of body and soul. Quickly put pressure bandages on spiritual wounds.

In Europe, the proportion of people who consider themselves religious is falling year by year, according to self-report surveys.²⁰ People are beginning to lose their sense of coherence and can become unbalanced. The individualism and gross irrationalities of modernity are already testing evolutionary knowledge. The main problem is that our capacity for evolution and adaptation is no longer a defence in this turbulent environment.

Alienation, man's loss of contact with his natural group-mates, his insensitivity to nature, the generalisation of all these things, are far greater dangers than the launching of a tactical nuclear bomb on the Russian-Ukrainian front.²¹

Man has come to understand the complex interconnectedness of life on earth (its autopoietic aspect). It presupposes the existence of guiding knowledge evolving in parallel in the force field of evolution. But can Darwin's infinite evolution of the individual, which destroys the chances of survival, be true? Rather, it was this particular knowledge that kept the fast-moving evolution on course, that spared it from dead ends. But it is no longer immune to the self-destruction of modern society.

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²⁰ BURKIMSHER 2014. 432-445., BRENNER 2016. 563-583.

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DOI 10.14232/belv.2024.1.16

<https://doi.org/10.14232/belv.2024.1.16>

Cikkre való hivatkozás / How to cite this article:

Jancsak, Csaba (2024): Jenő Bangó (1934–2023). *Belvedere Meridionale* vol. 36. no. 1. pp 212–213.

ISSN 1419-0222 (print)

ISSN 2064-5929 (online, pdf)

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Jenő Bangó was born in 1934 in Szombathely. He joined the scout movement as a schoolboy and became a member of Regnum Marianum, Scout Troop 3. He wrote his first piece of academic work, an essay with the title *The role of fire in the cultural history of mankind*, while still in school, and won a prize for it at the annual Regnum youth competition. His interest in understanding social processes had been greatly influenced by these years and this community. He started his secondary education at the Kőlcsey Ferenc Secondary Grammar School in Budapest, but he told a joke on Rákosi in his class, which led to a disciplinary decision expelling him and excluding him from all secondary schools in Budapest.

Then a year of physical work followed; he was working for the Hungarian State Railways, rebuilding the houses in Nyugati tér (then Marx tér) in Budapest, which had been damaged during the siege of the city in World War II. In the spring, he received a recommendation from the DISZ (Union of Working Youth) secretary at his workplace, certifying that he had been doing useful work as a labourer and, as a result of his successful re-education in communist ideology, he was no longer a class enemy. This opened up the way for him to continue his secondary

education. He enrolled at the secondary grammar school in Újpest, where, with the help of his teacher of Hungarian, he could complete two years in one and graduated in 1952.

He applied for two universities. Following a rational decision, he chose a degree programme in Hungarian and German studies at Eötvös József University of Sciences, and, following his calling, he also applied for the seminary for priests in Esztergom. It was the seminary that he entered in mid-September (there were five students in the class at that time!). The 1956 revolution found her there, and she and her fellow students participated in the events as volunteers in an auxiliary capacity. When the Soviets occupied Hungary, they received a message which warned them to flee because they were wanted. They left the country on 6 November. He ended up at the Pazmaneum in Vienna at first.

In 1957, he enrolled at the University of Leuven, receiving a Ford scholarship. It was here that he learnt French. As his scholarship ran out, in 1960 he applied for a job advertisement looking for teachers to the Belgian Congo. He and his two friends taught in Bakwanga in the Congo for a year. On his return, he worked at the Central European Research Institute in Leuven, first as a research assistant and then as a research associate. He graduated in 1963.

He was involved in the editing of the journal *Documentation sur L'Europe Centrale*, where he worked until the institute closed in 1968. It was then that he wrote his thesis "Changes in the Hungarian village". In this work, he examined how village life was rendered impossible and villages deteriorated under the communist dictatorship in Hungary. In 1973 he obtained his doctorate degree. He continued his teaching career at the University of Aachen, and in the meantime he pursued postdoctoral studies at the University of Freiburg until 1975. He taught as Professor of Sociology at the Universities of Düsseldorf and Aachen. From 2005 to 2007, he was an academic consultant to the Prime Minister's Office of the German-speaking Community in Belgium.

He shared his research findings in his higher education courses in the fields of sociology of knowledge, sociology of values, sociology of time, socio-regions and social pedagogy, and social work.

From 2008 on, he was a guest professor at the University of Szeged. With his teaching activities, his personal charisma, and his clear intellectualism endowed with values, Professor Bangó richly contributed to the education of intellectuals and the distinguished academic standard the University of Szeged prides itself on. He gave a video-recorded biographical interview to the Oral History Research Group of the University of Szeged, thus contributing to our research on the micro-history of the 1956 Revolution and its application in the projects run by the MTA-SZTE Oral History and History Education Research Group.

Professor Bangó was also an active member of the International Advisory Board of the social science journal *Belvedere Meridionale*. In 2012, he wrote and published a textbook for higher education entitled *Basic Sociological Concepts for Teacher Education Students*, published by *Belvedere Meridionale*. In an interview published in our magazine in the summer of 2019, he shared his message to students of the future: "If you have a good goal that you wish to achieve, never give up!"

In 2015, he was awarded the Hungarian Gold Cross of Merit for his work in education.

His thoughts and wise insights expressed in the discussions after his Thursday classes at university will remain with us forever, and his cheerful personality will not be forgotten.



Bangó Jenő előadása után a hallgatókkal, 2015-ben

Interview with Jenő Bangó:

JANCSÁK, CSABA (2019): Bangó Jenő a megértő szemlélő [Jenő Bangó, an understanding observer] (Budapest, Leuven, Bakwangá, Aachen, Eupen, Szeged). *Belvedere Meridionale* 31. évf. 2. sz. 210–221. pp. <http://dx.doi.org/10.14232/belv.2019.2.16> 6 <https://acta.bibl.u-szeged.hu/62871/>

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Erdélyi
Társadalom

21. évfolyam, 1. szám

Transylvanian
Society

Volume 21, Issue 1

2023

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