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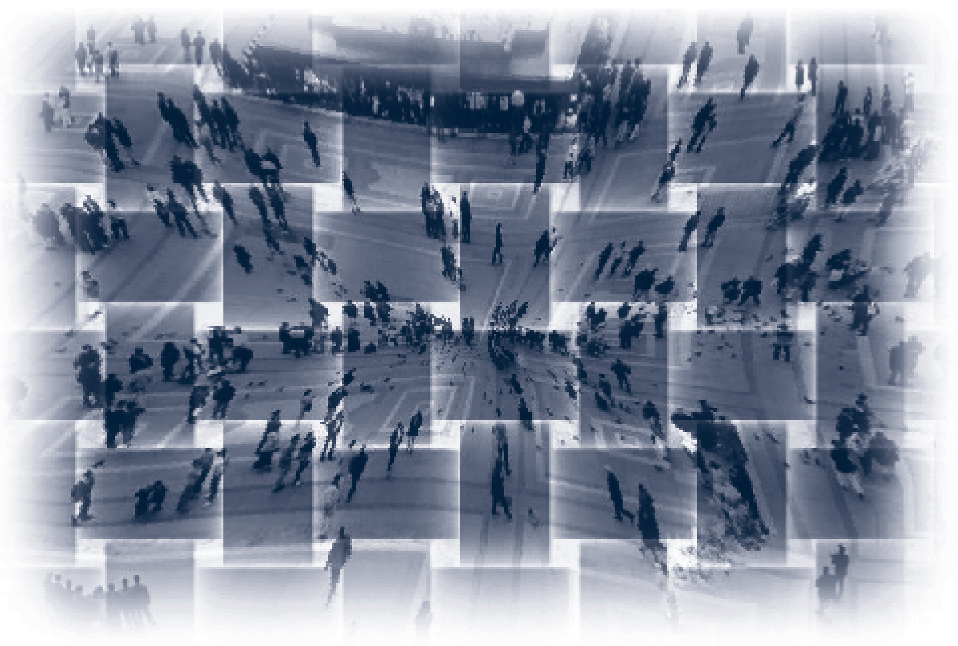

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BETWEEN STATISTICS, DEMOGRAPHY, AND MONOGRAPHIC RESEARCH: GH. RETEGAN (1916–1998), A(NOTHER) SOCIOLOGIST WITHOUT A SOCIOLOGY

CORINA DOBOȘ[1]

ABSTRACT. By exploring the professional trajectory of sociologist Gheorghe (George) Retegan (1916–1998), this article addresses the epistemological and personal reconfigurations of the field of social sciences in post-war Romania, highlighting the complex relations and professional rivalries in the field after the Second World War, and their consequences for social knowledge. My study explores Retegan's published and unpublished works, archival documents, and an interview that Z. Rostás conducted with Retegan in the 1990s. I analyse three research ventures relevant for understanding Retegan's professional trajectory and methodological choices: the 1948–1950 family budget research that Retegan coordinated at the Central Institute for Statistics; the 1957– 1959 monographic research he coordinated at the Institute for Economic Research; and his "farewell" to sociology and specialization in demography beginning in the 1960s. My article documents Retegan's remarkable capacity to develop research by way of formulating new questions, methodologies, and techniques, on the basis of the main elements of empirical research he learned during his training in sociology under the supervision of Anton Golopenția. Retegan's contributions to the field of empirical social research suggest how a context that was generally unfavourable for the development of social sciences (1948–1965) could be used in a creative way for the study of the social world. Epistemologically, the survival and even innovation of empirical research under unfavourable ideological and political conditions made possible the rehabilitation of sociology as a discipline in the much more favourable context of the second half of the 1960s.

Keywords: living standards, fertility rates, social sciences, epistemology, communism

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Introduction[2]

The professional trajectory of sociologist Gheorghe (George) Retegan (b. in Căianul Mic, July 14, 1916 – d. in Bucharest, 1998) aptly illustrates how the institutional, intellectual, and political challenges that social sciences faced during the communist regime in Romania resulted in important epistemological and personal reconfigurations of the field. The institutional and ideological pressure exerted by political actors, often against the background of professional and personal rivalries among researchers, influenced the way different social sciences were constituted, as well as their later dynamics. Specific knowledge also resulted from elements of personal biography; and the setup and trajectory of different disciplines were closely intertwined with the fates and personalities of their promotors. For example, research into the re-institutionalization of sociology in the 1960s revealed some of the epistemological consequences of the deep professional and personal rivalry behind it, especially in terms of the research topics and methods pursued in sociology (Bosomitu, 2017).

The case of Retegan allows a closer study of these dynamics, as he fortunately survived the *obsessive decade*, professionally as well. Together with other researchers, he went to prison following investigations in relation to the Pătrășcanu trial. Yet unlike Anton Golopenția (d. 1951), Retegan survived the four years spent in prison (1950–1954). After his release he returned to research, unlike Anton Rațiu, for example. Retegan's professional trajectory and his choice of methods and disciplines can clarify some aspects of the winding development of sociology in the years of "misery" (1948–1965) (Bosomitu, 2014: 334), during its "underground" period (Zamfir, 2005b: 55). This was the time when the discipline's institutional structures were dismantled by interrupting all sociological training and closing down the centres for sociological research (Bosomitu, 2014: 337; Zamfir, 2005b: 55). The period marked "the collective drama of the professional body of the discipline" (Bosomitu, 2012: 59), but also the gradual, controlled re-institutionalization of sociology beginning in 1962–1965 (Bosomitu, 2014: 340–343).

The period 1948–1965 is difficult to evaluate because two important aspects in the chronology of the discipline are debated: how profound was the rupture in 1948; and to what extent can the sociological method be separated from the theoretical and hermeneutical system in which it had been devised originally. Cătălin Zamfir proposed an innovative research hypothesis about

[2] This study was supported by a grant of Ministry of Research and Innovation, CNCS - UEFISCDI, project number PN-III-P1-1.1-PD-2016-1720, within PNCDI III, project DEMOECRO (*https://demohistory.wordpress.com/*).

this period, to allow moving past the evaluation of sociology after 1948 only in terms of *continuity* or *rupture* with the interwar sociology (Bosomitu, 2012: 62–63). Zamfir argued that "although sociology was excommunicated as a bourgeois science until the mid-1960s, it continued to function illegally already during the harsh 1950s," since

> distinguished sociologists of the Bucharest School [of Sociology] survived the wave of communist terror […] under different guises, other than sociology, continued sociological research, and this was the most important transmission source of a solid culture of sociological research to the young generation. They stimulated the interest of young [researchers] for sociology, training them professionally, guiding them through the bibliography of the field, including by borrowing them their own books. (Zamfir, 2005b: 56)

Zamfir's implicit distinction between sociology as a *discipline* (condemned ideologically and institutionally) and its *research* method allowed him to overcome the canonical perspective on the history of sociology according to which institutional dismantling meant its disappearance (Zamfir, 2005b: 56).

In this article I further develop this research hypothesis, asking if the strategy of perfecting empirical research to the detriment of theorizing, adopted in a political and ideological context unfavourable for the discipline as a whole, is also indicative of the methodological alternatives configured within the Bucharest School already before 1945. Sandu convincingly identified the different perspectives and orientations on monographic research existing within the Sociological School of Bucharest: the complete monography (promoted by Gusti), the abridged monography (*monografia sumară*, promoted by Golopenția), and the problem-oriented monography (promoted by Henri Stahl) (Sandu, 2012: 8–9; Golopenția, 2002). A nuanced perspective on the discipline in the post-war period encourages a similar approach to the methodological options in sociology before 1945.

Various research campaigns carried out before 1965, such as the analysis of family budgets from 1948–1950, at which Retegan took part, the territorial systematization research carried out in Hunedoara county in 1949–1950, at which Henri Stahl participated, or the monographic research coordinated by Retegan at the Economic Research Institute in 1957–1959, were reconsidered during sociology's ideological and epistemological "thaw" period of the 1960s as relevant examples of "concrete sociology." Examining this process of re-appropriation reveals the semantic field of the set-up and delineation of this disputed discipline, at the same time marking its historicity (Murgescu, 1962; Bugnariu, 1964; Mănescu, 1966; Murgescu et al., 1966; Stahl and Matei, 1966; Grigorescu, 1966).

This study analyses three moments relevant for understanding Retegan's professional trajectory and methodological choices, as well as the situation of sociology in the first two decades after the war: the 1948–1950 family budget research that Retegan coordinated at the Central Institute for Statistics (*Institutul Central de Statistică*, henceforth ICS); the 1957–1959 monographic research he coordinated at the Institute for Economic Research; and his "farewell" to sociology and specialization in demography beginning in the 1960s. My main sources are Retegan's published and unpublished works, archival documents, and a very valuable interview that Z. Rostás conducted with Retegan in the 1990s (Retegan, 2005).

Specializing in sociology

Born in Transylvania, Gheorghe (George) Retegan studied philosophy at the University of Bucharest, where he was admitted on a scholarship in 1938 (Retegan, 2005: 282). He graduated in 1942 (Costea, 2001: 386), one of the 20 students choosing "sociology as main subject for undergraduate diploma" (Retegan, 2005: 301). During the university years, he participated at several monographic research campaigns: the study of 60 Romanian villages (1938) and the research in Dâmbovnic (1939) (Retegan, 2005: 311–312). Gh. Retegan contributed to 4 of the 17 abridged village monographs resulting from the *60 villages* research, and also to the chapter on shepherding in Dâmbovnic. These studies were published at the beginning of the 1940s (Retegan, 1942a; 1942b; 1942c; Retegan and Zinverliu, 1942; Bârlea and Retegan, 1943).

Retegan was close with Anton Golopenţia, whom he had already met during his high school years, in 1936 or 1937, when Golopenția visited the village where Retegan was born, Căianul Mic, while he was coordinating students' research (Retegan, 2005: 277; Sandu, 2012: 8). Golopenția strengthened Retegan's decision to pursue sociology in secondary education (Retegan, 2005: 278), was his professor for the sociology seminar at the University of Bucharest (Retegan, 2005: 300–301), and at his proposal Retegan was hired at ICS in 1941 (Costea, 2001: 386; Retegan, 2005: 32; Golopenția S., 2009: 11–12). ICS, led by the physician and demographer Sabin Manuilă (1894–1964), became an important institutional option for many members of the Bucharest School of Sociology after the Romanian Social Institute (*Institutul Social Român*) was reorganized and the Youth Social Service (*Serviciul Social al Tineretului*) was discontinued in 1939 (Trebici, 1999a: 28; Golopenția S., 2009: 10–11). At ICS, among other tasks Retegan also coordinated the publication of the institute's journal, *Buletinul statistic* [*The Statistical Bulletin*] (File 82, 1951: 9).

Drafted in the artillery at the beginning of the Second World War, Retegan wrote his undergraduate diploma thesis on the front, about the living conditions and standard of living of the cleaning staff at ICS (Retegan, 2005: 287–288). Retegan defended it when he returned to Bucharest, in the second half of 1941. The thesis was well received by Golopenția, who recommended it for publication (Retegan, 2005: 288), but "The living conditions of the cleaning staff in a public institution in the capital" only appeared in print in 1945 (Retegan, 1945).

In the second half of 1941, Retegan also participated at the population and goods census carried out in Northern Bukovina and Bessarabia, Romanian territories ceased to the Soviet Union in June 1940 and recovered in the autumn of 1941 (Retegan, 2005: 288–289). In 1942–43, he took part in the ethnographic research campaign of Romanians living east of the Bug River (Golopenția A., 2006; Retegan, 2005: 390–401). Together with Anton Rațiu, he contributed to the actual organization of the campaign (Rațiu, 1994: 20). Five research teams were set up, with Retegan working alongside Ovidiu Bârlea, Traian Georgescu, and Eugen Seidel in the commune Constantinovca, Vosnesensk county (Rațiu, 1994: 23). After the research campaign was concluded in 1943, Retegan returned to Bucharest, and continued working at ICS after 1944 as well.

In 1947, Retegan earned his PhD in Philosophy *magna cum laude* (Costea, 2001: 386), with a dissertation on "The Situation of the Working Class in the Main Capitalist Countries in the Past Fifty Years" (Retegan, 2005: 251). He was then recommended by Lucrețiu Pătrășcanu for a scholarship in Paris, but he did not get it. The recommendation weighted heavily against him during Retegan's investigation in relation to the Pătrășcanu case (Betea, 2011: 151–152).

Labour statistics and the analysis of living standards

In the second half of 1947, ICS underwent important changes to its activity. Dr Sabin Manuilă, founder and director of ICS since it was established in 1936, was fired as head of the institute in the summer of 1947. In August 1947, Anton Golopenția was named "delegated general director" of ICS, a position he held until September 1948 (Golopenția S., 2009: 16). ICS was placed under the authority of the Ministerial Commission for economic recovery and monetary stabilization, whose president was Gheorghe Gh. Dej. The commission secretary, Miron Constantinescu, had supported Golopenția's naming as head of the institute. ICS was involved in evaluating the situation of statistics in Romania and drafted a plan to reorganize it, which was discussed in October 1947 at the ministerial conference for the reorganization of statistics. The decisions made then aimed to reorient Romanian statistics towards providing new data, essential for the elaboration and implementation of economic planning by the communist regime (Trebici, 1999b: 29; 1999c: 16).

The conference was organized at the request of the Higher Council for National Economy (*Consiliul Superior al Economiei Naționale*) and was presided by Gheorghe Gheorghiu Dej, at the time Minister for Industry and Commerce. In his opening speech, he emphasized the need for "a statistics connected to economic processes" (Consiliul Superior Economic, 1947: 6). The Central Statistical Commission, headed by Miron Constantinescu, analysed the organization of Romanian statistics, revealing the precarious state of industrial statistics (Consiliul Superior Economic, 1947: 31), financial and commercial statistics (Consiliul Superior Economic, 1947: 48), and social statistics, i.e., "the study of the working population" and the analysis "of the workforce as a whole" (Consiliul Superior Economic, 1947: 56). Indeed, another report dating from the same period showed that of the 727 employees of ICS, only 4 worked on social statistics (File 82, 1951: 14). During the conference, it was pointed out that in 1938–1939 ICS attempted to start accounting for the workforce and failed "because of the lack of personnel and resources" (Consiliul Superior Economic, 1947: 57). ICS was

> to be tasked with resuming immediately the statistical research of labour issues and with thoroughly organizing the Department for Labour Statistics within its technical division for Social Statistics. (Consiliul Superior Economic, 1947: 57)

Labor statistics would cover the distribution and movement of the workforce, labour productivity, the training of skilled workers, work conditions, wages, and workers' living conditions (family income and expenses, family budget, the level and structure of family consumption, the family's health and social circumstances) (Consiliul Superior Economic, 1947: 58–59).

In the summer of 1948, ICS was placed under the authority of the State Commission for Planning (*Comisia de Stat a Planificării*), established in July 1948 (Cătănuș, 2012: 108–114; Trebici, 1999c: 12–13). The need to restructure the field of statistics and re-establish its priorities led to the configuration of new areas of statistical expertise, in which Retegan easily found his place. Beginning with 1948, he led the newly established department for labour statistics and was involved in carrying out a survey on the living conditions of the families of factory employees and employees of state institutions (File 90, 1948: 27).

The survey was conducted in 1948–1950 on over 8,000 families from rural and urban areas, from Bucharest, and from all the country's historical regions (Mănescu and Vasilescu, 1967: 41; File 90, 1948: 2). The results were not published, and information on how the survey was conducted is fragmented, coming from different reports and statistical data sent to the State Commission for Planning. Established in July 1948 (Cătănuș, 2012: 108–114), the commission had authority over ICS starting in the summer of 1948 (Trebici, 1999c: 12–13). From this fragmented information, I will attempt to reconstruct the main characteristics of the research, focusing on the epistemological continuities with the surveys conducted before 1945 as well as on the methodological innovations implemented for the 1948–1950 survey.

Internationally, family budget surveys were a constant preoccupation of different specialized agencies of the United Nations (the International Labour Office, the Statistical Commission), which aimed to consolidate the research methodology and standardize results (Mănescu and Vasilescu, 1967: 37–38). In the interwar period, several recommendations were adopted regarding the recurrence of surveys, the selection of households, and the surveys' duration (Mănescu and Vasilescu, 1967: 37–38; International Labour Office, 1927). However, the most significant step towards the formalization and consolidation of survey methodology was made on the occasion of the Seventh International Conference of Labour Statisticians, when on October 7, 1949, a resolution was adopted on the methodology for the study of families' standards of living (Mănescu and Vasilescu, 1967: 38; International Labour Office, 1949: 49–54).

The Council for Mutual Economic Assistance (CMEA), established in 1949, also set up a working group on family budgets. It brought together specialists from several socialist countries, who sought to define a working methodology specific to socialist countries (Mănescu and Vasilescu, 1967: 39). The influence of post-war international research instruments on the 1948–1950 survey is a topic for future research, but it can be assumed that it was rather limited at the time, especially since the survey in Romania started before these main methodological innovations in the field of family budget research at the international level. This hypothesis is strengthened by the fact that between 1942 and 1956 Romania was not a member of the International Labour Organization, and that no representative from Romania was present at the International Conference of Labour Statisticians in October 1949 (International Labour Office, 1949: 69–76).

Therefore, identifying the epistemological roots of the 1948–1950 survey is a productive line of inquiry. Gheorghe Retegan and D. C. Georgescu participated at the elaboration of the research methodology under the coordination of Anton Golopenția (Trebici, 1999b: 39), interim director of ICS between August 1947 and September 1948 (Golopenția S., 2009: 16). In September 1948, Golopenția and D. C. Georgescu were removed from ICS, and the mathematician Gheorghe Mihoc became the institute's director until 1951 (Trebici, 1999c: 12; Trebici, 1999c: 30, 38). Retegan continued to work at ICS until March 1950 (Costea, 2001: 386). The experience gained by D. C. Georgescu and Retegan before 1945 from the surveys of peasants' nutrition (Georgescu, 1936; 1940) and the surveys of employees' family budgets (Retegan, 1945) proved useful for the 1948–1950 survey.

Before 1945…

Standard of living surveys in interwar Romania had been conducted and adapted especially for the study of the peasantry, while the number or surveys addressing employees and city dwellers was low (Retegan, 1945; Dunăre, 1945). The most remarkable was the study of peasant family budgets in 1938, conducted as part of the investigation of 60 Romanian villages. The research covered 235 rural households, distributed throughout the country (Stănculescu and Ștefănescu, 1942). The survey coordinated by Retegan at ICS in spring 1941 was meant to be the first in a series of "studies of state functionaries at all levels, but especially the basis for establishing an Office for Social Surveys with the goal of *expanding this kind of research to all the professional categories in the country*" (Retegan, 1945: 99, emphasis mine). The Office, which was supposed to provide data "about the overall standard of living of social classes" (Retegan, 1945: 99), was never established, while the information about "the standard of living of urban families" (Retegan, 1945: 102) remained profoundly lacking.

"The study of the state of professional categories with the help of the overall standard of living through surveys" (Retegan, 1945: 101) had already become a reputable tradition in Europe, being practiced at an increasingly larger scale beginning in the second half of the 19th century in most industrialized countries. Originally, these surveys focused mostly on the investigation and presentation of the structure and dynamics of workers' family budgets, and the results were used to substantiate social reform measures. This type of research became more encompassing after 1920, when the study of the income and expenses of workers' households was integrated to the broader study of "*families' overall standard of living*" (Retegan, 1945: 101, emphasis in original). Retegan also adopted this broader perspective in the research conducted in spring 1941, which sought to present the objective, measurable indicators of standard of living within the framework of respondents' behaviour and aspirations. The research consisted of filling in a personal sheet for every worker and analysing the size and source of the overall family income according to the number of family members and the number of wage earners in the family (Retegan, 1945: 112–115). Retegan also analysed the structure and percentage of different types of expenses (food, housing, clothes, tobacco and matches, transport, health and hygiene, intellectual and moral necessities, cinema and entertainment, other) incurred by a family relative to its size (Retegan, 1945: 115–124). The emphasis was on food expenses (which accounted for over 60% of the income) and on determining "the characteristics of dietary habits" in the studied families by analysing the food items consumed in a household. This also allowed qualitative assessments of the nutritional value of food consumption (Retegan, 1945: 116–119). This research also examined the degree to which income matched expenses, which was influenced not just by income and family size, but also by the "level of personal household management," a direct result of the respondents' educational and cultural level (Retegan, 1945: 124–125). Finally, the analysis included a reflection on the respondents' "process of adapting to urban life" (Retegan, 1945: 125–127). The organizational and methodological experience Retegan gained conducting this (small) survey of employees' families that belonged to the same socio-professional category proved important for the larger-scale research at which he participated at the end of the 1940s.

1948–1950: The survey of family living conditions

The research conducted at ICS between 1948 and 1950 was launched on July 1, 1948 (File 90, 1948: 23).[3] Compared to the surveys on nutrition and living conditions before 1945, this was carried out on a much larger scale. According to Retegan, the survey aimed to centralize data on:

a. the structure of family budgets (wages, revenues from [agricultural] holdings, other earnings, etc.);
b. earners (family members who earned wages, regardless of their nature) and the average number of earners per family;
c. wage distribution by area (rural / urban) and region;
d. the structure of family expenses, with a focus on the close relationship between revenue levels and type of expenses;
e. the standard of living according to family size and burden, taking the family with no children as a basis for comparison; and the standard of living of the four main professional groups analysed. (File 90, 1948: 26).

[3] The survey was deterred in Bucharest, and in Iași, Timiș, and Hunedoara counties, where the preparations for the survey were not ready in due time (File 90, 1948: 23).

The research was meant to obtain data of "great significance from the point of view of economic policy," such as a breakdown of the cost of living into its main components and an evaluation of the overall consumption of foodstuff and clothing (File 90, 1948: 26). Moreover, it collected important information on the health, housing conditions, education, etc., of the members of surveyed families (File 90, 1948: 26).

More than 8,000 families were studied (File 90, 1948: 25), from several professional categories (the majority factory employees), from both rural and urban areas. Respondents selected from all historical regions of the country were surveyed over a period of 14 months (File 90, 1948: 2, 30). ICS departments at the central and regional levels (external offices) were involved in the survey, as well as trade union organizations for different production branches, which facilitated the recruitment of respondents. Social councillors (*îndrumători sociali*) participated as well; these were employed by different factories and institutions and worked voluntarily outside working hours, advising 15–20 families each (Vasilescu et al., 1972: 2002).

Families participated at the investigation on a voluntary basis and were offered consumption vouchers as an incentive (File 90, 1948: 23). Those selected for the survey received a questionnaire ("the family book") which they had to fill in and mail monthly; the data was centralized and processed statistically (File 90, 1948: 23–25). Retegan had already identified this data collection method to be best suited for such an investigation since the May 1941 survey. However, because of the war circumstances, it could not be applied then (Retegan, 1945: 103). The 1948–1950 survey targeted several professional categories, from both rural and urban areas (File 90, 1948: 95–110). The majority were factory employees from urban areas: administrative staff, technical personnel in managerial positions, auxiliary technical personal, skilled, industrial, and unskilled workers (File 90, 1948: 2, 28, 29). The most difficult task was to obtain conclusive answers from industrial and unskilled workers. In their case, the difficulty was finding "a head of the family to keep the family book in good condition," which was much easier in the case of administrative staff families (File 90, 1948: 24). Consequently, the researchers had to adjust how they processed the responses obtained from different professional categories, so as not to over-represent some and under-represent others. For the statistical analysis of the answers, employees, regardless of their branch of activity and area of provenance, were classified in four "professional groups" (*grupe profesionale*): workers, technicians, state employees, and factory employees (File 90, 1948: 18).

The analysis of centralized data yielded the structure of income and expenses for the surveyed families, according to the professional group to which the head of the family belonged (File 90, 1948: 18, table II). A comparative analysis of the income of employees in the months of August and September showed an increase in money income by 2.1% for all families (more pronounced for the families of factory staff and less pronounced for those of state employees) and an "encouraging" (File 90, 1948: 19) increase in the share of income obtained from exercising one's profession (wages, benefits, overtime) compared to the income in kind (evaluated in money and obtained from individual farming, hunting, fishing) and to different accounting entries (recovered debts, credit purchases, loans) (File 90, 1948: 95).

Expenses registered for the months of August and September were compared across 11 categories (food, clothes, shoes, household, hygiene, medical expenses, education, personal expenses, transportation and travel, investments, accounting expenditures) and the four professional groups (File 90, 1948: 19, table III). Findings showed that food costs, although they remained the most important category of expenses, had dropped by 4.8% in September compared to the previous month, with the largest decrease registered by factory employees and the smallest by state employees. This decrease corresponded to an increase in other expenses, especially instruction and education, with a higher spending on books and newspapers (File 90, 1948: 20). Food costs represented the larger share of the expenses of the surveyed families' expenses (File 90, 1948: 20–21, table IV), regardless of income size or the professional group to which the head of the family belonged, as "the share of food expenses for workers' families is very close to that of state and factory employees" (File 90, 1948: 21). The study also found that "at the same income level the same food is consumed almost in the same quantities, regardless of the group to which the head of the family belongs" (File 90, 1948: 21).

The quantitative and qualitative study of nutrition in relation to income size, professional group, area of origin, and number of family members was central to the 1948–1950 statistical analysis. This had been a well-defined research topic already in the 1930s, though mostly applied to the study of the rural population. The investigation of the nutrition of families participating at the survey conducted at the end of the 1940s through the analysis of calorie consumption in a family was unitary and standardized, "according to a standard established in relation to the work effort expended and the number of consumption units" (File 90, 1948: 26). The "unit of consumption" used in the 1948–1950 research was 1 for those over 12 years old, with correction coefficients for age, not the number of family members. These coefficients had been set by the League of Nations in 1935–1936 (File 90, 1948: 31), and their use permitted a standardized analysis of food consumption and nutritional needs by age and expended work effort (File 90, 1948: 31).

In the research he conducted in 1938 on the population of 59 villages, Georgescu had used the "consumption unit" and adapted the age correction coefficients, an important contribution towards the use of statistics in the analysis of nutrition.[4] This experience proved very useful for the living standards research in 1948–1950.[5]

The study conducted at the end of the 1940s used the nutritional standard established in 1929 by the commission of physiologists in Geneva (File 90, 1948: 31), as had other studies carried out in the interwar period. The caloric deficiencies observed in August 1948 varied in inverse proportion to income, and in the case of the caloric need at rest deficiencies were more pronounced for the income groups below 10,000 lei (File 90, 1948: 31, 34). The qualitative analysis of food consumed in August also showed that the share of animal protein consumption, proteins that were "the most important for the body's well-functioning and maintenance," was not satisfying, and that their shortage was in inverse ratio to the size of families' income (File 90, 1948: 32–33).

The quantitative (File 90, 1948: 35, table 1) and qualitative (File 90, 1948: 40, table 6; 37, table 3; 41, table 7, table 8; 42, table 9) analysis of nutrition relative to income in August 1948 showed the different caloric averages, nutritional components, and types of food consumed by different income groups, and in so doing operated a daring synthesis between Georgescu's and Retegan's research interests. However, Retegan's role in analysing the data obtained in 1949–1950 is ambiguous. Although an interpretation of the data exists, it was not signed by Retegan, neither did he take responsibility for it otherwise (File 90, 1948: 62–75, 76–94).

The atmosphere at ICS was becoming increasingly tense: during investigations related to the "Pătrășcanu case," several employees of the institution, including Retegan, came under direct scrutiny. A "Summary report on the leadership and the current situation at the Central Statistical Institute" dating from January 1949 noted that "ICS is an institution that lent considerable support, through the statistical data it provided, to the Antonescu regime in preparing and maintaining a war of aggression against the USSR" (File 3, 1949: 2).

The same report described Retegan as "a notorious supporter of [Iuliu] Maniu, and trusted man of Manuilă and Golopenția. The trade union and the party organization [from ICS] consider him a sworn reactionary" (File 3, 1949: 5). Anton Rațiu and Nicolae Betea were the first arrested from ICS - as participants

[4] Georgescu published the results of the investigations made in 1938 on the nutrition of 265 peasant families coming from 59 villages of Romania (Georgescu, 1940: 5–6, 9–10).

[5] In both the investigation from 1938 and the one in 1948–1950 the same percent of 10% for food waste was used. This percentage was considered by Georgescu as being more useful than the one of 5% proposed by the Belgian E. J. Bingwood in 1934 (Georgescu, 1940: 11; File 90, 1948: 31).

at the research campaign conducted east of the Bug River but also close acquaintances of Pătrășcanu, and tied to Manuilă's flight and Pătrășcanu's supposed attempts to flee the country. After he was removed from ICS in September 1948, in January 1950 Golopenția was arrested in the Pătrășcanu investigation (Betea, 2011: 313). Tragically, he did not withstand the rough conditions in jail and the investigation, and died in the Jilava prison in September 1951 (Trebici, 1999b: 40). Retegan was also arrested in March 1950 and detained in Jilava, initially accused and investigated for "high treason," later for "plotting against the social order" (Costea, 2001: 386). He was tried in April 1954, acquitted, and immediately released from prison.

Although Retegan's professional career at ICS was interrupted, his contribution to the methodology of the 1948–1950 survey is beyond question. Documentation of the family budget survey conducted in July–September 1948 shows methodological progress from the research carried out by Retegan and Georgescu before 1945, the two who had most contributed at defining the methodology and aims of the survey. Some of these improvements were: expanding the analysis of living standards to more professional categories throughout the country, especially industrial wage-earners from urban areas; detailed analysis of income structure; highlighting the relationship between income level, the level and type of expenses, and professional group; quantitative and qualitative analysis of family nutrition, correlated with income level and professional group.

Family budget surveys were conducted in the following decades as well, with some important changes: the questionnaire was gradually simplified so that it could be filled in easier by the families surveyed but also to allow a more efficient processing of data. After 1950, the survey was also "limited to families of employees", and starting in 1952 a research campaign targeted peasant family budgets (Mănescu and Vasilescu, 1967: 41–42).[6] In 1953, the task of carrying out family budget surveys for both employees and peasants was transferred to the regional statistical offices. The number of surveyed families, set at the national level at 2,200 families of employees and retired workers and 3,000 peasant families, was maintained at least until 1964 (Mănescu and Vasilescu, 1967: 42). When standard of living surveys was conducted in an epistemological framework explicitly defined as sociological after 1965, many of the methodological directions and innovations applied in the 1948–1950 survey were reintegrated (Mănescu, 1966: 7–24).

[6] For studies about surveys on the living standards in postwar Romania see Mărginean (2015b; 2017).

1957–1959: The monographic research

The second significant moment in Retegan's post-war career was his involvement in the socio-economic monographic research campaigns carried out in 1957–1959 at the Institute for Economic Research (*Institutul de Cercetări Economice*, henceforth ICE). The institute was established in 1953 and belonged to the Academy of the Romanian People's Republic (Institutul Naţional de Cercetări Economice, 2013: 13).

After his release from prison in July 1954 (Retegan, 1950), Retegan could not find work for almost two years. He could not return to his previous position, and, as he later explained, he had not wanted that either (Retegan, 2005: 398). Finally, Retegan was hired at the Research and Design Institute for Paper, Cellulose, and Reed in October 1955, where he worked until June 1957 (Costea, 2001: 386; Retegan, 2005: 405), when he was transferred to ICE. His transfer to the institute came unexpectedly, as monographic research was also moved to ICE, as Retegan recalled:

> And he requested my transfer to the Academy. I believe two people talked about me at the Academy, [Mihai] Levente, who took over the leadership of the Central Office for Statistics [*Direcția Centrală de Statistică*, DCS], and [Mircea] Biji. And Levente no longer wanted to… I told you that [sociological] research teams were established at DCS, and Levente wanted nothing to do with them. He said "I do statistics, not sociology. The Academy - that's its business." And then he transferred us to the Institute for Economic Research. "Who should we name there?" And then Levente and Biji said "That one [Retegan]… He's better than the others." I was vetted! */he laughs/* It ended in the known failure. (Retegan, 2005: 405)

The "research teams established at DCS" Retegan was referring to were the teams that were conducting since 1954 the "monographic research of villages in People's Republic of Romania" (Biji and Barat, 1956: 6), at the reorganized Central Institute for Statistics (renamed in 1950 the Central Office for Statistics, *Direcția Centrală de Statistică*, hereafter DCS). DCS was led between 1951 and 1956 by Manea Mănescu (Berca et al., 2013: 305, 338). Primarily motivated by the need for statistical data on agriculture (Retegan, 2005: 348), Mănescu encouraged restarting the monographic research of villages, in the mid-1950s. After being abandoned at the end of the 1940s, monographic research was resumed at DCS in 1954-56 in the broader context of the ideological thaw following destalinization (Bosomitu, 2017: 56), so that "at a time when references to sociologists and especially those around Gusti were still not possible, sociological monographs were considered a model for describing the situation of some villages" (Rostás, 2012: 89). The coordinator of monographic research at DCS had been Eugen Barát, a specialist in agricultural statistics, who although had not taken part at the research of the Bucharest School, was familiar with its works (Retegan, 2005: 348–249).

The monographic research of villages had been ideologically redefined in the mid-1950s "on the basis of Marxist-Leninist knowledge" and cleared of the "reactionary, anti-scientific theories of D. Gusti and the so-called Romanian Sociological School" (Biji and Barat, 1956: 12). Adapted methodologically and thematically to capture the new sociocultural and economic realities of Romanian villages in the context of the construction of socialism, it continued to be practiced until 1956. In 1956, Mihai Levente (1915–1986) was named head of DCS, which he led until 1962 (Betea, 2011: 131–134). Levente had also been hired at DCS by Golopenția (Golopenția S., 2009: 11), participated at the research campaign east of the Bug River (Retegan, 2005: 392), and had also been investigated in the Pătrășcanu case (Betea, 2011: 240). He probably wanted to avoid the risk of being associated with "sociology" - a field which at that time was in a delicate situation - and therefore this type of research was transferred to ICE (Murgescu, 1962: 240). Retegan was brought over to conduct these studies. Retegan recalled the difficult situation at the time, when it was not allowed to mention "sociology" but only "monographic research. That was the directive!" (Retegan, 2005: 349).

Later, in the 1960s, in a more relaxed ideological context, more favourable to the discipline of sociology, the studies that had been described in 1957–1960 as monographic socio-economic research were re-defined as "concrete sociological research" (Grigorescu, 1966). That was also when a distinction was made between the 1957–1959 studies and other monographic research conducted at ICE previously, which focused either on industrial or agricultural production units (Murgescu, 1962: 240) or on "theme problems" (Murgescu, 1962: 243). While the previous monographs conducted at ICE addressed "reciprocally conditioned problems […] within the same economic unit", or looked to "a certain specific problem […] in the varying conditions of several enterprises" (Murgescu, 1962: 243), the 1957–1959 monographic research went" beyond the limits of a productive unit (an industrial of farming enterprise), and took into account the totality of social-economic changes characteristic of the people's life" (Murgescu, 1962: 244). Regardless of how it was defined at the time, the 1957–1959 monographic research was a significant moment in the process of rehabilitating sociology as a science in Communist Romania (Rostás, 2012: 89–91; Székedi, 2017: 39).

Not just Retegan, but also other members of Gusti's School, such as Henri Stahl and Octavian Neamțu, took part at the organization and implementation of the 1957–1959 research campaign (Rostás, 2012: 89; Retegan, 2005: 344–345).

The campaign was substantial and earned increased visibility. In 1958, a government decree was issued about the monographic research activity carried out by ICE, which had become the coordinating institution for "the monographic research of economic and social realities in our country" (HCM 902, 1958: art.1). Following requests from ICE, the decree involved local authorities (the executive committees of popular councils) in carrying out monographic research campaigns in both villages and cities. Every year, during research campaigns, these local structures were required to provide for the research teams "one physician, one veterinarian, one agronomical engineer, one teacher, and one specialist in every field typical for the researched localities" (HCM 902, 1958: art. 4). Moreover, different research and education organizations at the local and central levels were asked to contribute to the monographic research campaigns.

One of the key issues of the monographic research campaign carried out by ICE in 1957–1959 was training the personnel involved (Retegan, 1958: 40). Retegan played a decisive role, organizing and coordinating special training workshops. In the summer of 1957, the training took place at the V. I. Lenin Planning Institute (now the Academy of Economic Studies), and in the summer of 1958 close to Bucharest, at the school of horticulture. The workshops lasted for a month and counted among the teachers Mihai Pop and Eugen Barát, but despite sustained efforts, Retegan did not succeed to involve neither Stahl nor Octavian Neamțu in these workshops (Retegan, 2005: 349). Among participants were researchers from higher education institutions in Bucharest but also local specialists (physicians, agronomists) who were trained for field research, as Retegan recalled:

> They'd never done sociological research before in their lives, or this kind of research. And so, we took people teaching in higher education - lectors, assistants, those higher up wouldn't come, but lectors and assistants came - and locals. I wanted to work with agronomists from there rather than bring them from here. Or the physician - I'd rather have the local physician than bring a physician from here. So, we were bringing them. We wrote to the county secretary for propaganda - or for whatever they were, I don't know - and asked, and he sent them. And for this one month we had food and accommodation for free. And travelling costed nothing. (Retegan, 2005: 351)

At a time when there were no possibilities for sociological training, the ICE campaign had created the framework for imparting summary knowledge about monographic research and sociology. Teaching monographic research was also facilitated by the elaboration, in the wake of the 1957 research campaign, of a "Guide for monographic research," an actual research textbook to which Retegan contributed and which was used as teaching material during monographic research training workshops in 1958 (Bochiș et al., 1959: 75).

In 1958, it seemed that the situation had settled, if not for sociology as a whole, at least for its research methods. At the end of 1959, however, monographic research at ICE in general and Retegan in particular came under direct attack abruptly, in an article published in the journal *Lupta de clasă* (*Class struggle*) (Bochiș et al., 1959). The article condemned the low quality of the monographic research conducted in 1957, because of

> serious deficiencies in the study and interpretation of phenomena, due first of all to the mistaken, non- Marxist perspective underlying the way in which monographic research was designed and organized. (Bochiș et al., 1959: 75)

Retegan was explicitly accused of prompting researchers to “objectivism” in their approach to the topic, which was equated with “ideologically disarming [the researcher] - meaning, open ground for bourgeois ideology and distorting reality. The Marxist researcher can only do fieldwork armed with the historical materialist approach, the only scientific approach to society” (Bochiș et al., 1959: 78).

The reasons behind this attack, which led to the temporary discontinuation of monographic research in the form Retegan had conceived and applied it at ICE, have been laid out and explained either in a broader ideological and international context (Rostás, 2012: 90–91; Székedi, 2017: 140), or with reference to circumstantial factors, such as professional jealousies and rivalries or pursuing short-term interests (Retegan, 2005: 345–347, 351–356). Carrying out monographic research along the lines drawn by Retegan at ICE was further complicated by the relocation of Miron Constantinescu to the institute, a key player in the fate of social sciences in Romania during the communist period. After his “fall” from the top ranks of the Romanian Workers’ Party and his replacement as Minister of Education in July 1957, Constantinescu was “relocated” as director of the National Economy Institute (July 16, 1957–June 1958) (Bosomitu, 2014: 268–269), and showed interest in monographic research, which resulted in a series of personal animosities within and outside of ICE (Retegan, 2005: 345–348).

Beyond the general and circumstantial factors that favoured the initiation and then discontinuing of the studies coordinated by Retegan at ICE between 1957 and 1959 (Retegan, 2005: 354), a summary epistemological analysis of this research attempt can lead to a better understanding of the way in which interwar “monographic research” was reinterpreted at the end of the 1950s, with the fundamental input of Retegan. This analysis is brief and limited because of the sources available, namely several articles about the research published in specialized journals between 1957 and 1966.

Methodological developments of interwar monographic research

In an article published in 1958, Retegan defined the main features of the new research carried out at ICE, pointing to the ways in which it differed from similar studies in the past (Retegan, 1958). From the legacy of monographic research conducted by the Bucharest School of Sociology, Retegan claimed that two elements "had remained relevant" in 1958: the direct study of reality by "complex monographic research teams" and providing training prior to the research campaign (Retegan, 1958: 37–38). Of the research techniques formalized during the campaigns of the Bucharest School, Retegan highlighted: direct observation, archival research, interviews, documentary movies, and "statistical methods" that unfortunately "had not received full attention" (Retegan, 1958: 38).

Retegan also mentioned an article published in 1953 by Denis Szabo, professor at the Catholic University in Louvain (Retegan, 1958: 33; Szabo, 1953). Szabo explained Gusti's monographic research with explicit references to Gusti's theoretical system of which the method was an integral part (Szabo, 1953: 660). In an appendix, the article reproduced "the program of Prof. Gusti's monographic studies," noting that this could be adapted for the study of urban societies (Szabo, 1953: 667–669), something which Retegan also emphasized (Retegan, 1958: 33). Moreover, Szabo's article showed the innovations brought by the Gusti School in "the field of sociological research," with a focus on "the Gusti School's input to contemporary sociology" (Retegan, 2005: 246) and the superiority of the Gustian research approach compared to those of "American, English, and French sociologists" (Retegan, 1958: 33). For Retegan, this appraisal from the part of a "university professor [Denis Szabo]" (Retegan, 2005: 246) meant "recognizing the international primacy of the qualities of the direct research methodology elaborated by the Bucharest School" (Retegan, 1958: 33).

The fact that in 1958 Retegan avoided explaining the Gustian system of structuring and interpreting data, insisting instead on the research methodology of the Bucharest School, can also be understood in the context of a more general strategy adopted at a time when sociology continued to be a problematic discipline. The Bucharest School was only evoked prudently and within an ideological framework considered safe (Rostás, 2012: 89–90; Murgescu, 1957). Probably seeking to protect the research from possible ideological attacks, Retegan focused on the "technical" aspects of monographic research (interdisciplinary teams and different methods of direct research), without the Gustian interpretative system which represented the theoretical framework of monographic research:

> 20 years have passed since the last large-scale research of the Bucharest School, during which the design and the technique of social investigation have been enriched, under new social circumstances, with an experience that allows direct research […]. The start of the Romanian society on the path of socialist transformation made it necessary to renounce the sociological theory of the Bucharest School and replace it with a Marxist-Leninist approach, creating a new design and considerably improving the investigation technique. (Retegan, 1958: 33)

Retegan's precautions proved to have been in vain. The attack against monographic research stemmed from ideological considerations and mobilized ideological arguments, including the criticism of Retegan's choice of a "bourgeois sociologist" such as Szabo, deemed "no less than a bourgeois ideologue [who] appreciates his apologetic brothers, showing full interest in pseudoscientific methods" (Bochiș et al., 1959: 79).

Seen in a broader context however, Retegan's prudent remarks indicating the need for theoretical innovation in monographic research prove substantial. The way in which he related, decades later, to Gusti's and Golopenția's perspectives on the configuration of sociology as a discipline, and especially its role and value for society (Retegan, 2005: 249–250), reveals Retegan's preference for Golopenția's empirical research of particular topics with immediate utility over the ambitious project of total sociology conceived and promoted by Gusti.

The regional focus of monographic research

As Dumitru Sandu convincingly argued, "the regional component of the Bucharest School" (Sandu, 2012: 7), although seemingly marginal, had in fact become increasingly important methodologically and epistemologically as the "region" represented not just a framework for the selection of villages but also "a framework of analysis and interpretation" (Sandu, 2012: 10). The typological study of villages that Golopenția coordinated as part of the *60 villages* campaign, which Retegan was very familiar with, is a relevant example for the regional orientation of interwar monographic research. The study involved abridged monographs for villages considered typical: a) plain villages;[7] b) mountain villages;[8] and c) hill villages of winemakers and fruit-growers

[7] The villages Șepreuș, Jdioara, Perieţi, Văleni, Stoeşeşti, Corcmaz, Chirileni, Slobozia Pruncului, whose abridged monographs were published in Golopenţia and Georgescu, 1943.

[8] The villages Mărul and Bârsești, whose abridged monographs were published in Golopenția and Georgescu, 1943.

with additional occupations.[9] Analysing the publications and activities of the Bucharest School, Dumitru Sandu highlighted the importance of the community-regional perspective in interwar monographic research, pointing to the opportunity to study the (dis)continuity of this regional perspective in the post-war period (Sandu, 2012: 12).

A study carried out in the second half of 1949 in Hunedoara county at the initiative of the Urbanism Department of the Ministry for Constructions (Mărginean, 2015a: 76–83) aimed to "revise the best methods of documentation necessary for regional systematization in the future" (Stahl and Matei, 1966: 283), and therefore had a strong regional orientation. In 1958, Retegan (implicitly) referred to this study as having a "pronounced monographic character," conducted by several research centres "of regional importance" (Retegan, 1958: 30).[10] After 1965, Stahl described the same campaign as one of "concrete sociological research" (Stahl and Matei, 1966: 283). Regardless of how it was subsequently defined, the Hunedoara county study had been complex. It was coordinated by a central multidisciplinary group, comprising: three architects, two sociologists, one demographer, one geologist, one climatologist, one urban engineer, one architect specialized in urbanism and one in rural constructions, one economist, one agronomist, one zootechnician, one forestry engineer, one physician, one railway engineer, and one historian. Henri Stahl and ten other former members of monographic research teams took part in it (Stahl and Matei, 1966: 286).

The explicit regional approach was extremely challenging from a methodological point of view, as it entailed moving away from

> the old sociological studies of this kind, which had been conducted previously in the country and were limited to studying a pilot-village and then extending [the research] comparatively to a nearby area, with the intention to investigate a limited area of territory at the most. This time, the issue raised was how to research an entire county in order to integrate the results into a state plan, in the context of building socialism (Stahl and Matei, 1966: 286).

The research campaign was carried out in a county that was very heterogenous not just from a geographical, but also a socio-economic point of view. The main challenge was "collecting documentation that could lead to basic solutions to all the issues raised by the territory, a starting point for all the studies and specialized designs necessary for a unitary resolution" (Stahl and Matei, 1966: 284). The documentation collected was synthetized in "116 final

[9] The villages Cârligele, Căianul-Mic, Mocodul, Vidra, Bucșoaia, Bogații, Târnava, whose abridged monographs were published in Golopenția and Georgescu, 1942a.
[10] See also Mărginean, 2015a: 79–81.

sketches, of which 105 on specific issues (13 for geography, 7 for industry, 13 for agriculture, 17 for zootechny, 8 for forestry, 6 for trade, 12 for demography, 15 for public health, 11 for thoroughfares and means of communication, 3 for settlements), 8 syntheses (about underdeveloped areas), and 3 conclusions" (Stahl and Matei, 1966: 292). In what concerns the usefulness of the research campaign for the Hunedoara county, the documentation collected was indeed used for the county systematization plan, "the first to be published in the post-war period, considered a methodological point of reference in the field of regional socioeconomic development" (Mărgineanu, 2015a: 80).

The Hunedoara county research prompted multiple methodological innovations, which allowed the formalization of a research method adapted to the needs of regional studies. Defining and standardizing these needs subsequently made possible the systematic research, "village by village," of a county in Dobrogea, and summary documentation on "given issues," such as the study of the Bistrița Valley in the context of the Bicaz dam construction (Stahl and Matei, 1966: 292). Without a doubt, several elements of this regional approach were taken over and developed in the 1957–1959 campaign, to which Stahl also contributed.

The monographic research campaign conducted at DCS in 1954–1956 had investigated 20 villages from different regions of the country (hill, plain, winemaking, fruit-growing, animal raising, and mixed regions). These villages were selected as representative for the area where they were located. In order to capture the post-war political, economic, and social transformations, some of the chosen villages had previously been studied during the *60 villages* research campaign from 1938, whose results were published between 1941 and 1943 (Golopenția and Georgescu, 1941; 1942c; 1942b; 1943), and some of the villages were less researched. Of the 10 villages studied in 1954, 8 had also been studied by monographic research teams in 1938; of the 9 villages investigated in 1955, one village; and of the 8 villages studied in 1956, seven (see Appendix). The typological approach to the study of villages, inaugurated during the 1938 campaign, had therefore been used in 1954 as well. The monographic research conducted at ICE in 1957–1959, however, explicitly aimed for an innovative regional approach.

From *socio-economic area* to *microregion*

The regional approach of the ICE research campaign in which Retegan was involved moved from the study of "the socio-economic area" (1957) to that of "microregions" (1958–1959). Retegan's choice for a regional approach represents another argument for him moving beyond Gusti's theoretical and interpretative framework in monographic research.

The studies conducted in the summer of 1957 focused on the "socio-economic area" (Bochiș et al., 1959: 72; Grigorescu, 1966: 320). This was a group of villages considered homogeneous and typical from a socio-economic point of view, of which one was a pilot village and the others were nearby villages (Murgescu, 1962: 244). 8 such socio-economic areas were studied, comprising 52 villages and one industrial centre (Grigorescu, 1966: 320). Each area was named after the pilot village and the campaign resulted in 8 monographs (Bochiș et al., 1959: 72):

- Dorobanțu (Medgidia rayon, Constanța region), typical for a collectivized area;
- Micăsasa (Mediaș rayon, Stalin region), typical for an area under the influence of an industrial center;
- Mădărașul de Câmpie (Tg. Mureș rayon, Hungarian Autonomous Region), a representative centre for the growth of industrial crops;
- Sânmihaiu Român (Timișoara rayon, Timișoara region) and Dioșdi (Caracal rayon, Craiova region), both typical for the cultivation of crops;
- Oltenești (Huși rayon, Iași region), typical for a mixed area – grain and viticulture;
- Budești (Oltenița rayon, Bucharest region), peasant trade area under the influence of the Bucharest urban centre;
- Horodnicii (Rădăuți rayon, Suceava region), typical animal husbandry area.

As detailed in an article published by Costin Murgescu in 1962, the campaign was carried out by multidisciplinary monographic research teams comprising 96 researchers, who studied 8 groups of villages. The teams were composed of economists – 41.6%; philosophers – 11.5%; agricultural engineers – 10.4%; statisticians – 8.4%; physicians – 8.4%; professors – 8.3%; veterinarians – 7.2%; others – 4.2%. The composition of a complex research teams was decided based on the features of the settlement researched (Murgescu, 1962: 247). Although this study had been openly described as monographic and Murgescu's article was published in a more favourable context for sociology then the one in which the research itself took place, Murgescu did not refer to the researchers who conducted fieldwork as "sociologists," but by the specializations (economists, statisticians) under which several of the members of the Bucharest School had continued their research careers (Bosomitu, 2012: 62).

The research carried out in 1958–1959 focused on several localities, both rural and urban. 7 areas were studied, comprising 56 localities, including one urban locality and 3 industrial centres (Grigorescu, 1966: 320). The concept of "microregion" was chosen for the integrated research of these different types of localities. The concept had been circulated before, as one of the solutions for the optimal systematization of Hunedoara county (Mărginean, 2015a: 80).

The ICE monographic research campaign built on the experience in Hunedoara and the "microregion" became an instrument to analyse the social and economic dynamics between rural and urban areas. The "microregion" was defined not from an administrative, but a socio-economic point of view, and it comprised localities that had in common certain features of the production process and which gravitated around a pivot-centre; their study could lead to general summary conclusions (Grigorescu, 1966: 320). The microregion was formed from "a group of villages […] with homogenous morphological, demographic, economic, and social characteristics, both with regard to their structure and their functions" (Retegan, 1958: 41). The presence among them of an urban centre with which "the other settlements maintain complex relations" was mandatory (Retegan 1958: 41). The microregion was structured around an urban centre - a city or industrial centre. Studying the microregion also answered the need to include urban centres in monographic research, as "excluding cities from the field of social investigation was and remains an anomaly. Their existence demands investigation" (Retegan, 1958: 41–42). Directing monographic research towards the study of urban centres within the microregion presupposed not just the study of cities of microregional importance, but also that of cities "of regional or national importance" (Retegan, 1958: 42). In several cases, the microregions also included areas in the midst of industrialization (Murgescu, 1962: 244; Bochiș et al., 1959: 72). In August 1958, ICE studied three such microregions: Țicleni-Rovinari, with the localities Țicleni, Rovinari, and the surrounding villages; Reșița, comprising the Reșița Steelworks and several villages nearby; and Câmpia Turzii, which included the factory "Industria sârmei" and several villages with economic ties to the city (Bochiș et al., 1959: 73; Retegan, 2005: 323).

The research plan elaborated by Retegan for 1958 listed 9 main issues to be tackled in the study of microregions (Retegan, 1958: 42):

- the microregion's geographical conditions;
- the issues of population and labour force;
- production relations; social classes and groups;
- the industrial, agricultural, etc., processes;
- exchanges between city and village;
- the material, sanitary, and cultural standard of living;
- the social institutions of the people's democratic regime;
- forming the socialist social consciousness; its content and forms of manifestation;
- overall evaluation and perspectives for development.

An article published in the mid-1960s pointed out that the study of microregions in 1958–1959 also included aspects related to factories, labour force migration towards industrial centres, social changes due to the transformation of the professional structure of the population investigated, effects of socialist industrialization on agricultural areas, and the population's standard of living (Grigorescu, 1966: 320).

Data collected in the study of the three microregions mentioned above, partially published after 1965, confirms this broad research perspective (Murgescu et al., 1966: 41–44). For example, part of the results obtained could be used for a diachronic analysis of the social mobility of work collectives in the three industrial centres present in the microregions (Reșița Steelworks, the factory "Industria Sîrmei" from Câmpia Turzii, and the oil and coal enterprises in Țicleni-Rovinari). In particular, the study examined the move from one socio-professional category to another, correlated with the length of the industry's functioning (Murgescu et al, 1966: 41–44). Moreover, based on data collected in the 1958–1959 campaign, two factory monographs were published in 1963 by the publishing house Editura Academiei RPR: *The Reșița Works in the Years of Socialist Construction* and *Wire Rod Industry - Câmpia Turzii* (Institutul Naţional de Cercetări Economice, 2013: 15).

The research campaign concluded abruptly in 1959, following the virulent attack in the article "For the Scientific Perspective in Monographic Research" (Bochiș et al., 1959) which targeted both monographic research and Retegan personally. However, the methodological and epistemological innovations, the data collected, and even the basic training in the technique of monographic research proved important as they found their place in the new ideological and institutional context of the 1960s, which led to the re-institutionalization of sociology in 1965. In this context, much more favourable to sociology, the studies were reconsidered as telling examples of "concrete sociology," adapted to the new socio-economic realities of 1950s Romania (Bugnariu, 1964). Although with a delay, the results of the 1958–1959 campaigns were finally published in 1963 and 1966. They became reference points for sociology as a discipline in the process of being re-institutionalized and redefined, adapted not just to ideological pressures, but especially to the new socio-economic realities of socialist construction.

The monographic campaign coordinated by Retegan at ICE between 1957 and 1959 also brought important methodological innovations, such as the regional research approach detailed above and the use and further elaboration of statistical methods in monographic research (Retegan, 1958: 43; Grigorescu, 1966: 320).

The abrupt end of the research in 1959 had important consequences for Retegan's professional career. It marked his "symbolic" departure from sociology, paradoxically in a context much more favourable to sociology than it had been after 1948 (Retegan, 2005: 359–362). Familiar with demography ever since the research conducted east of the Bug River in 1942–1943 (Retegan, 2005: 371), Retegan specialized relatively quickly in demography, and became, in a short time, one of the most reputable researchers in the field in Romania.

The 1960s: Demography and parting with sociology

Retegan's decision to specialize in demography beginning in the 1960s can illuminate how the career change strategies adopted by some of the former members of the Gusti School in the post-war period contributed to the development of various fields of social research under communism.

Demography, a discipline on the rise beginning in the interwar period, developed within the institutional infrastructure set up by Sabin Manuilă, first at the Ministry of Labour and Health and later at ICS, where demographic statistics became one of the best-performing branches of centralized statistics (Trebici, 1999c: 11). The discipline kept a low profile after Manuilă fled in 1947, and especially during the period of ideological and institutional pressure on the social sciences in 1948–1954. In the 1960s, demography was (re)configured, developing in close connection to the economic sciences both institutionally and epistemologically (Trebici, 1981; 1990; 1996; 2011: 102–103). Attempts to set up a central institution for the study of demographic phenomena and to formulate public measures meant to influence their evolution picked up speed after 1965 (Trebici, 1968). This happened in the context of the demographic challenges brought by industrialization, urbanization, and the collectivization of agriculture, which led to a marked decrease in fertility rates that seemed to threaten the workforce supply. More and more articles on demographic issues at the national and international levels were published in statistics and economics journals such as *Revista de Statistică* (*The Journal of Statistics*), *Probleme economice* (*Economic Issues*), or *Consfătuiri statistice* (*Scientific Reunions of Statistics*). In 1968, the decision was made to establish a central institution, and in 1970 the National Commission for Demography was set up, under the helm of the State Council (Soare, 2011).

For Retegan, who worked at ICE until 1965 (Costa, 2001: 386), demography represented a new chance to continue his professional career in the field of social research. He is responsible for several improvements to the statistical measuring of demographic dynamics and to methodology, but also for attempts to define demography epistemologically and as a discipline.

Starting in 1961, Retegan published under the pseudonym of G. R. Șerbu[11] a series of articles analysing the demographic dynamics of the biggest cities in Romania, in which he showed that the population increase in these cities, both before and after 1948, was the result of massive migration from rural areas rather than an increase in urban birth-rate (Șerbu, 1961a; 1961b; 1962; Retegan, 1965).

Retegan was also the first to compute the evolution of fertility rates in the post-war period, by making use of the "gross reproduction rate" a synthetic index that measured the degree of population replacement in a generation (Șerbu, 1962: 45). He highlighted the marked decrease in fertility beginning in 1956, which he claimed was mainly explained by the legalization of abortion on demand in 1957 and the popularization of contraceptive measures (Șerbu, 1962: 47, 51), and he argued for the importance of studying birth-rates in Romania (Retegan, 1964). His fertility computations remained reference points not just during the communist period, but also after (Ghețău, 1997: 4–5). The 1962 study was considered "the most important moment that defined demography as a science in the post-Manuilă and post-Golopenția period" (Trebici, 1999c: 23), as Retegan succeeded to reconstruct "for the first time the marriage rate and fertility rate for a period of 60 years" (Trebici, 1999c: 23).

Retegan tried to improve the research methodology in demography (Retegan, 2005: 355–357) arguing for the need to collect new types of data at registry offices and during population censuses, and especially for supplementing them with demographic surveys (Șerbu, 1962: 46–47; Retegan, 1962: 700). The surveys would provide new information on the relationship "between economic and social factors and the decrease in fertility rates, on the one hand, and on the other hand the attitude of each social class towards population reproduction and the mechanism of propagating demographic behaviour from one social class to another" (Șerbu, 1962: 46–47). The series of demographic surveys conducted in the 1960s and 1970s shows that his pleas did not go unechoed (Pescaru, 1964; 1967; Trăistaru, 1968).

Retegan also strived to (re)define demography epistemologically and as a discipline in the second half of the 1960s, when the institutionalization of the discipline picked up simultaneously with the start of the pronatalist policy of Ceaușescu regime (Retegan, 1966a; 1966b). In several articles written at the time, Retegan went to considerable lengths to clarify the epistemological and methodological autonomy of demography and its relationship with other social sciences, especially sociology, the monopolizing attempts of which Retegan

[11] The demographer Vasile Gheţău indicated that Retegan and Şerbu are one and the same person. (Gheţău, 1997: 8)

contested (Retegan, 1966b). Retegan's attempt to define demography as a social science can be understood not just in relation to sociology, but also in the context of the early 1960s, when serious efforts were made to (re)orient demography as an analytical and multidisciplinary science. This set it apart from mere statistics and rendered it a true "population science," also preoccupied with studying the factors that influenced demographic phenomena (Trebici, 1999c: 24). He did not shy away from a veritable "plea for the independence of demography" (Retegan, 1966b: 104), openly maintaining "demography's right to *independence*, to *autonomy*, even though I was a sociologist before becoming (if you agree) a demographer" (Retegan, 1966b: 101). He described the epistemological relationship between the two disciplines as follows:

> Two different situations are possible: a) Independence, but with important borrowings in terms of theory and empirical research from the part of both sciences. The scientific achievements of one are taken over by the other, and vice versa; b) Demography is integrated by sociology, in which case demography is considered a sub-branch of sociology. The first situation is normal. The second should be discussed and rejected based on arguments. (Retegan, 1966b: 101)

Even so, Retegan conceded that it was difficult to choose between the two disciplines:

> It is difficult to study demography without knowledge of sociology—*and knowing sociology means knowing the social reality*; it is equally difficult doing sociology without knowledge of demography—*and knowing demography also means understanding the social side of demographic phenomena and processes*. (Retegan, 1966b: 104)

Retegan's attitude and his claim might seem surprising considering not just his experience and qualifications in the field of sociology, but also the emulation and effervescence surrounding the discipline in the second half of the 1960s, including the professional opportunities in this field. Retegan's option for demography at a time when sociology was being reconfigured institutionally becomes more intelligible when it is corroborated by Retegan's admission during the interview with Z. Rostás.

In the mid-1960s, there were two alternative projects for the re-institutionalization of sociology, one configured around Tudor Bugnariu and Traian Herseni, the other around Miron Constantinescu (Bosomitu, 2012: 65–66; 2014: 340–342). In the autumn of 1965, Retegan was invited to collaborate in the former, and found it wholly inappropriate, both in terms of the institutional architecture proposed and in terms of the research program (Retegan, 2005:

359–360). Retegan was not asked to participate in Miron Constantinescu's project, however, which was ultimately the successful one (Retegan, 2005: 360). He later admitted that personally he would not have wanted to be invited, because "I broke off with sociology. I still do it for myself, at home. I think about sociology and…" (Retegan, 2005: 360).

New professional challenges probably helped him make the decision: Retegan served as advisor at the National Council for Scientific Research (1966–1969) and the Governmental Commission for Economic and Technical Collaboration and Cooperation (1969–1971) (Costea, 2005: 386; Retegan, 2005: 363–366). In parallel, he continued his activity in the field of demographic research, in particular economic demography (Retegan, 1967). In May 1971, he became member of the National Commission for Demography, which had been established two months prior (File II.20: 251; Retegan, 2005: 363).[12] He was part of its secretariat and starting in 1972 also of its research group for the movement and structure of the population (File II.20: 3).

In 1973–1974, Retegan was involved in organizing the UN World Population Conference held in Bucharest in 1974. The Romanian National Committee for the organization of the conference was set up in November 1973. It included political actors as well as specialists from the National Commission for Demography and other institutions, and its aim was to organize the World Population Conference in Bucharest (File IV.118: 32, 58). Its permanent secretariat included, since April 1974, a scientific group formed by Retegan and Vladimir Trebici (File IV.118: 115–117). Retegan was one of the 19 advisors in the Romanian delegation who participated at the World Population Conference (File 6237, 1974: 73–74), which took place on August 19–30, 1974. Between 1973 and 1976, Retegan also had a short university career, teaching at the Academy of Economic Studies and at the University of Bucharest (Costea, 2005: 386).

Conclusions

The main moments in Retegan's professional trajectory and the methodological developments of his most important studies, as outlined in this study, allow sketching several conclusions regarding the evolution of the Bucharest School in the post-war period. Retegan's trajectory after 1948 highlighted the complex relations and professional rivalries in the field of social sciences after the Second World War, and their consequences for social

[12] The membership of the National Commission for Demography was approved in May 1971 (Decret 197, 1971).

knowledge. In what follows, however, I will not focus on this aspect, but rather on how the case of Retegan invites reflection on the fate of social research in Romania in the first post-war decades.

Retegan proved a remarkable capacity to develop research by way of formulating new questions, methodologies, and techniques. He did so on the basis of the main elements of empirical research he learned during his training in sociology under the supervision of Golopenția (Retegan, 2005: 284). In each of the two main research campaigns he conducted after 1948 - at DCS in 1948–1950 and at ICE in 1957–1959 - Retegan built and improved on the experience of empirical research from before 1945, according to his own admission:

> I think I am a Gustian, even if the theoretical or fundamental ideas don't fit, because methodologically I cannot be any other way. Of course, I am someone who pays much more attention to quantitative methods now than was the case back then. (Retegan, 2005: 307)

Retegan's capacity to develop empirical research methods at a time when sociology as a discipline had been marginalized, methods which could later be appropriated as sociological, is better explained in light of the interview he gave Z. Rostás. Referring to the legacy of the Gusti School, Retegan distinguished between sociology's hermeneutical system and the sociological research method:

> In my opinion, as I told you, the system was not well-articulated, it did not have a framework. There was, from my point of view, this very strong theoretical framework. The other elements, even if they were not fully engaged, not so well-articulated into this framework, would have been so in time. A strong framework presupposes a singular, well elaborated doctrine.
> - *That is, unitary…*
> - Yes. This is why everyone could fit in the School: those on the left, on the right, on the centre, or without political attitude or behaviour. A School that has a strong framework only allows in those who are earnest followers of that theoretical framework.
> - *It had more of a methodological framework.*
> - That one was strong. (Retegan, 2005: 245)

Retegan also distinguished between a "material" (the result of empirical research) and a research that becomes a "study" when the data obtained was presented in the framework of a "unitary system" (Retegan, 2005: 245). This explicit distinction between the theoretical framework of sociology (the system) and the sociological research method was also formulated implicitly by Retegan in his 1958 article, when he invoked Szabo's piece without any reference to the

Gustian system but instead insisted on the qualities of the research methodology of the Bucharest School. As mentioned previously, if in 1958 this distinction could be understood as part of a semantic strategy aiming to place the research within a seemingly secure ideological framework, Retegan's statements in the post-1989 interview suggest that the distinction between sociological system and the methodology of sociological research was not just a figure of speech.

The preference for the research methodology over the hermeneutical system can be explained not just from the perspective of the institutional and ideological limitations in the 1948–1959/1965 period, when sociology was marginalized, and the discipline's research and education infrastructure was dismantled. It was also the sign of a different perspective on research methodology and the social role of sociology, increasingly more prominent towards the end of the 1930s within the Bucharest School of Sociology (Sandu, 2012).

After the institutional infrastructure of sociology was dismantled in 1948, Retegan, like other members of the Gusti School, tried to adapt to the times, and oriented himself towards other specializations in the field of social research (Bosomitu, 2012: 62–63). He oscillated between statistics, monographic research, and demography, areas in which he could use his knowledge of empirical research.

Retegan's preference for empirical research is probably also what helped him achieve methodological innovations, creatively building on the interwar legacy. I have discussed these developments both in the case of the family budget survey from 1948–1950 (including more socio-professional groups) and in the case of the monographic research from 1957–1959 (regional approach and statistical methods). In what concerns his specialization in demography, Retegan pointed to the need to conduct demographic research in order to capture the changes in people's behaviour and values with consequences for reproductive behaviour at the time of intense socio-economic and political transformations.

Retegan's contributions in the field of empirical social research might have even benefited from this lack of system, suggesting how a context that was generally unfavourable for the development of social sciences (1948–1965) could be used in a creative way for the study of the social world. Epistemologically, the survival and even innovation of empirical research under unfavourable ideological and political conditions made possible the rehabilitation of sociology as a discipline in the much more favourable context of the second half of the 1960s. My study showed how the empirical social research conducted in this "age of misery" of Romanian sociology transmitted and improved upon research methods developed before 1945. Moreover, the focus on empirical research instead of theory become an important feature of Romanian sociology after 1965

(Zamfir, 2005a: 12–13; Zamfir, 2005b: 67–70). The survival and relaunching of sociology around empirical research perfected in a period when theorizing about the social world, beyond the official and ideologically acceptable theories, was risky. The research that Retegan carried out between 1948 and 1959 also shows that sociology's "age of misery" can be rethought as a period of experimentation and methodological innovation in the field of empirical research of social realities, which could later be developed in a more favourable institutional context.

Conducting empirical research in the absence of an institutional infrastructure dedicated to sociology specifically (practically non-existent between 1948 and 1959) was possible in an institutional context marked by the socio-economic development plans of the communist regime. The success and efficiency of economic planning, industrialization, urbanization, territorial systematization, and the collectivization of agriculture fundamentally relied on quantitative and qualitative information provided by empirical research. This led to an increase in the number of sites from where data was obtained and aggregated. If "sociology" had become politically and ideologically unacceptable, the knowledge and techniques of empirical research acquired before 1945 proved very useful for economic planning and the socialist transformation of the economy.

The empirical research conducted in 1948–1959 discussed in this article were re-appropriated, beginning in the 1960s, as sociological research: the family budgets survey carried out at Central Statistical Institute in 1948–1950; the territorial systematization studies conducted in Hunedoara county by the Urbanism Department of the Ministry of Constructions in 1949–1950; the village monographic research campaign coordinated by the Central Statistical Office in 1954–1956; and the monographic research implemented by Retegan at the Institute for Economic Research in 1957–1959. These were all hosted by central or regional state institutions where sociological research was not one of their specific activities.

The research campaigns in which Retegan was involved show that the need for empirical data, essential for elaborating the socio-economic plans of the communist regime, led to the configuration of a loose network of actors producing empirical knowledge, which functioned as an informal context for training and transmitting the investigation skills needed for the empirical examination of social realities. This happened before the re-establishing, in the second half of the 1960s, of several research and higher education institutions explicitly for sociology, with the researchers affiliated with them recognized as "sociologists."

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APPENDIX

Map of monographic research conducted in
rural areas in 1938 and 1954-58
(Murgescu, 1962: 245)

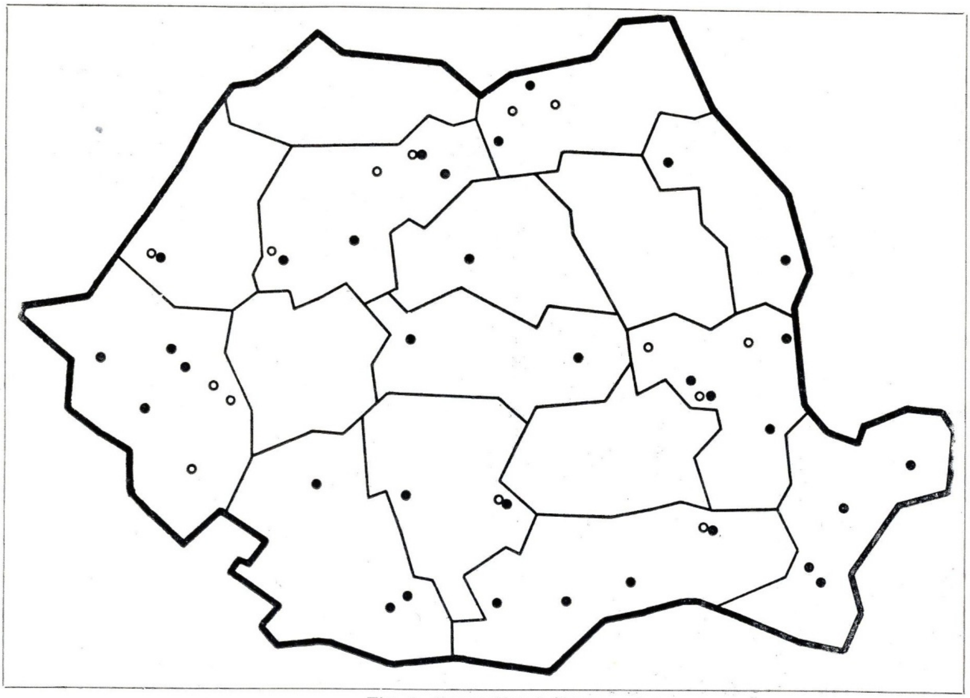

Fig. 1. Conventional Signs :
● Villages investigated by the Rumanian Social Institute.
○ Areas investigated by the Central Statistics Agency and the Economic Research Institute.
N. B. For 1938 only villages with published monographs have been indicated. In addition, economic condition was investigated in 17 villages and population movement in 14 villages.

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A KNIFE TO A GUNFIGHT: ENDOGENOUS DEVELOPMENT THROUGH LEADER AS CONTRADICTORY POLICY PRESCRIPTION

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ABSTRACT. By now a preferred EU instrument aimed at stirring rural development, LEADER initially constituted an alleged departure from the top-down productivist agenda of the CAP towards locally-led development. The exogenous-endogenous explanatory model legitimized the adoption of economistic assumptions into EU rural development policy. As the CAP policy genealogy conveys, agricultural policies occurred at the intersection of internal and external factors, whereas the endogenous framework evicts structural explanations for territorial marginalization. A case study from North-western Romania provides details on the implementation of the endogenous agenda from the perspective of public actors. Rather than inducing an alleged alternative development model, LEADER acts as adjuvant to other policies and, overall, as a pedagogical exercise in uneven development.

Keywords: Common Agricultural Policy, LEADER, rural development, exogenous-endogenous debate

Introduction[2]

The pandemic driven Economic Recovery Pack presented by the EC President von Layen in late May 2020 represents an unforeseen discursive „reinforcement" of Rural Development Policy as key policy, after the January discussions on the next budget period pointed to funding cuts. After the risks of uninterrupted endless economic growth have been illuminated by the lockdown imposed during the pandemic, the degrowth paradigm resurfaces as an even more compelling alternative.

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Rural development has long been designated an economic problem and is still treated as such by EU policy. While to some extent it represents a valid proposition, economic thinking has taken over other areas of intervention and reduced most aspects of social life to the discipline's specific assumptions. Exogenous and endogenous thinking, the latter a heuristic device increasingly applied to economic models in the 1980s (Romer, 1994: 3), was transferred to rural development policies. A Trojan horse, as Somers (2005) puts it, social capital and its variations made their way in social theories and inherently supported the reinforcement of economistic legitimacy. Although it led to the production of a significant body of rich analyses of rural processes, most tackled the efficacy of the Common Agricultural Policy (hereinafter CAP) and even when some of its assumptions have been laid out, its origins have been naturalized.

The argument is that dereliction of European countryside has been conflated with a specific type of economic problematization. LEADER is an example of persistent portrayal of rural development as economically unsuccessful because it lacks the required growth oriented structures, particularly the lack of coordination. However, while some 'successes' of LEADER can justifiably be claimed, and the endogenous ontology alludes to progressive approaches, the structure and overall context of the action will not lead to solutions to the deemed rural problems, if the endless growth model and contradictory upper level policies continue. Worrying, the 2014-2020 cycle has further mainstreamed the model to territorial policies without proper acknowledgment of its questionable assumptions.

The article departs with an overview of the history of the CAP and its driving factors. It continues with a critical take on the principles of LEADER, particularly the origins and implications of the exogenous-endogenous debate. Next, drawing on a case study part of the Relocal.eu project focused on perceptions of spatial justice among stakeholders surrounding a Local Action Group (LAG) in North-western Romania, the article supplies observations on where and how endogenous practice fails.

The CAP - assessments of its continuity and fragmentation

The history of the CAP has been the subject of numerous thorough studies (e.g. Lynggaard 2006). Several points, however, are worth mentioning here, particularly in respect to some of the policy drivers shaping the role of LEADER. The European project enshrined agriculture as a key focus in the Treaty of Rome in 1957 when concerns of food insecurity determined by World War 2 were still looming. Moreover, the Commission's proposal in 1960 underlined the need to protect the internal market from fluctuating world markets (Feindt, 2018), turning it into an exceptionalist policy. What makes agricultural policy special in the EU is its continuity and its main actors' aversion to change. A three decades old debate lingers on if and how the CAP has shifted from its original dominant productivist principle towards a post-productivist (Mather, Hill and Nijnik, 2006; Almstedt et al., 2014), or to a neo-productivist phase (Pelucha and Kveton, 2017), as well as if it exerts signs of a post-exceptionality era (Greer, 2017; Daugbjerg and Feindt, 2017). Definite conclusions depend on the assessment of variables such as the policy community influence, the overall changes in the EU mechanisms and the impact of global contexts. In a twist of events, "[d]uring the post-productivist era the main threats to the countryside are generally perceived to be agriculture itself rather than urban or industrial development" (Wilson, 2006: 4). Simultaneously, pleas for a shift to a degrowth paradigm are on the rise (Hickel, 2017; Gerber, 2020).

Income support for agricultural producers remains the primary objective of the CAP, with others stuck in a secondary position (Feindt, 2018: 121). Continuity of the CAP has been safeguarded by its sectoral character, which transformed it into a domain controlled by club-like policy circles which enforced its path-dependency. Change has been difficult to conceive and implement also because of complex decision layers embedded in the EU. However, significant transformations have been pushed through several key reforms, particularly starting with the MacSharry reform in 1992. Core values of the PAC also trace back to the support of small scale familial farms. Yet this corollary to the initial CAP focus on food security progressively turned into increased support for large scale farms, the main winners of the subsidy policy, thus eroding the legitimacy of the program and exposing it to further criticism. Self-regulation, a key characteristic of the highly insular agricultural policy world, was further contested when trade organizations and organic and eco movements gained prominence.

A series of factors regarding technological agricultural progress, EU's political organization, and international pressures drove change in the CAP. External ones are related to global processes starting in the 1970s and accelerating in the 1980s, particularly the oil shock and increased trade liberalization culminating in the General Agreement on Tariffs and Trade (GATT), which later on became the World Trade Organization. Numerous internal factors added up to a main significant output: protectionist policies in the 1960s and 1970s led to a crisis of overproduction determining low prices and alarmingly decreasing returns for small scale farms. Moreover, technological advances leading to increased yields and less required workforce meant that member states' rural areas were at risk of being deserted or of transformation into poverty islands. Complementarily, the enlargement processes in the 1980s added Greece, Spain and Portugal, countries with substantial agricultural interests, the 1990s phase with Sweden, Finland and Austria, and the 2000s wave of Central and Eastern states, which further augmented the intricacies of the policy process. The CEE enlargement and its impact on agricultural policy was already taken into account during the European Parliament Copenhagen Summit in 1993 (Swinbank and Daugbjerg, 2006: 51). Moreover, budgetary concerns were raised by the member states supporting increased liberalization. Feindt (2018) points three discourse coalitions concerning agriculture. The productivist interest was dominated by farm organizations, France and Mediterranean countries. A multifunctionalist approach to rural areas rose from pressures from environmental and consumer NGOs and member states reliant on Pillar 2 (rural development), such as Finland and Austria. The market liberalist direction stemmed from industry groups, development groups, states with corporate agricultural sectors, particularly Denmark, the Netherlands and the United Kingdom.

The main element of the 1992 MacSharry reform, named after the respective Commissioner for Agriculture, represented the decoupling of price support and the introduction of direct payments. Some authors (Lenschow and Zito, 1988, in Lynggard, 2006; Swinbank and Daugbjerg, 2006) attribute the 1992 MacSharry reform to external factors, particularly the GATT. A re-evaluation of the impact of agricultural transformations on rural societies led to the introduction of multifunctionality as a more complex framing of solutions to development problems. With MacSharry, environmental concerns are mainstreamed into rural development policies. As the GATT tightened the window to enact the reform, and the consensus on interventionism within the agricultural policy networks was reached (Daugbjerg, 1999), its radical liberalization demands were suppressed.

The 1999 Fishler reform divided the CAP into two pillars, with a first representing a continuation of market interventionism, and a second focused on rural development policies. Fishler continued the PAC reform in 2003, with the introduction of eco-conditionalities and modulation, the latter signifying a response to criticism of some member states that allocations between Pillar I and Pillar II are too rigid. The same reform introduced the Single Payment Schemes, as well as a plan for transition for the incoming CEE member states. Modulation brought concerns of fragmentation in policy implementation among member states and diagnostics that the measures could translate into a 're-nationalization' of CAP (Swinbank and Daugbjerg, 2006: 56). The continuation of payment schemes in the most recent group of member states meant that the productivist character of the CAP was breathed with new life.

In regards to the 2013 reform, Greer (2017) concludes that although it introduced some changes, particularly the increased flexibility between pillars and the addition of new actors in the policy field, they can hardly constitute a shift from the exceptional character of agricultural policy. The key principles of the CAP are now market competitivity, convergence and capping. In the 2014-2020 programming period, two specific measures to support farmers (subsidies for income insurance and mutual funds) have been switched from Pillar 1 to Pillar 2, subverting the distinction between pillars and attracting criticism (Feindt, 2018:128). Moreover, as Daugbjerg and Feindt (2017: 8-9) point out, increased corporatization and financialisation of agricultural production extended the networks of upstream (such as financial institutions and chemical producers) and downstream interests (e.g. processors and distributors). In terms of its purpose, the EU rural development policy of the present programming period cannot be described as 'development' policy (Pelucha and Kveton, 2017: 9), as the emphasis still lies on sectoral agricultural tools, which cannot directly contribute to territorial cohesion objectives. The nine objectives presented by the European Commission in 2018 for the 2021-2027 period reiterate the CAP's focus on farm support, with increased focus on environmental issues.

Gorton et al. (2009) drew attention that the CAP arrived in Central and Eastern Europe with an unadjusted 'farm-centric' bias and no significant changes followed the negotiations with Agriculture Ministries in the New Member States. The authors' explanations point towards lack of administrative capacities in the NMS, on top of significant differences in regards to farm structures, as well as socio-economic convergence of their rural areas. Consequently, they argued that increasing direct payments through Pillar 1 could work against some policies in Pillar 2. Thus, the EU missed an opportunity to transform the CAP into an adequate pan-European policy. In the 2014-2020 period, Pillar 2 received 24.4 percent of the total funds (European Parliament, 2020) and the proposals tabled by the EC in 2018 and the Council Presidency in February 2020 for the 2021-2027 period advanced a 25 percent decrease in funding for Pillar 2 and just a 10 percent decrease to Pillar 1. However, the economic recovery plan forwarded by the President of the EC in May 2020 contains an increased amount for Pillar 2.

LEADER - from CAP compromise for prolonged productivism to mainstreaming in territorial policies

Presently a key EU development policy, LEADER is described as an attempt to counter the declining state of rural areas with instruments aimed at stirring locally-oriented development based on several key principles: a bottom-up approach, participation, partnerships, innovation; all channelled through Local Action Groups (LAG). It signified an intention of shifting policies from sectorial to territorial. The policy narrative portrays LEADER's alleged success as the factor leading to its mainstreaming in the 2014-2020 period within three additional funds under the umbrella of Community-Led Local Development. We will now look at the roots of the initiative, its underlying thesis – the shift from exogenous to endogenous development, and some main characteristics displayed during implementation.

The program can be traced back in two directions (Smith, 1995): one had been the need to counter the reforms of the CAP through a diversified approach; another represented the intention to directly stimulate financially more innovative regional and local thinking - thus, at least partially, bypassing member states' central governments. LEADER can be seen as an EU project of decentralization of national policies supported by the promotion of endogenous development, which places agency for change in local contexts. We can also note that the anti-state development projects were on the rise in the 1980s global context of fragmentation of development actions, when NGOs occurred as legitimate actors. Previously, global development actions and donor agencies have been dominated by economists, who searched for single causes for underdevelopment and prescribed monocausal solutions (Holcombe, 2014: 775).

The program's origin lies in the Commission of the European Communities paper of 1988, 'The Future of Rural Societies' (Moseley, 1995: 246). Projects developed in the 1980s, for example the French 'contrats de pays' and the projects of Scottish Highlands and Islands Development Board highly influenced the development of LEADER (Smith, 1995). The 1988 reform allowed the EC to introduce pilot interventions as 'Community Initiatives' and LEADER was rolled out in 1991 for a three-year period, then extended for another five years under the name LEADER II, when 887 Local Action Groups received funding. During the 2007-2013 cycle it became a part of Pillar 2.

The 1988 report was informed by global contexts "[t]he Community is determined that its rural society should not gradually become a sort of technological Third World, condemned to a status of permanent underdevelopment" (Commission of the European Communities, 1988: 11). It indicates that the Commission was admittedly aware of various global systemic processes and their replication at different scales, including in its own policy territory. Although the report mentions some relations between rural and urban processes (e.g. migration), some aspects of the diagnostic are conducive to prescribed conservative solutions:

> [t]he objective that should be pursued, in view of the pressures of modern development on rural society (first standard problem), is far less that of speeding up economic development in the rural areas than that of strengthened protection of the rural environment (1988: 8).

The diagnostic continues by arguing that

> [u]rbanization, industrialization, the development of transport infrastructures, the excessive pressure of tourism in certain areas, the scattered siting of new buildings (splinter development), and the occasionally reckless use of new techniques in all branches of activity, including farming, have combined to deface much of the countryside in the Community in the past few decades and continue to do so (1988: 16).

The report exhibits a theoretical cut of rural-urban flows and a distancing, faraway gaze of the analysts. The separation starts in the title with the categorization of 'rural society' as inherently opposed to an 'urban society', thus holistically different. Moreover, the colonial term 'indigenous potential' appears 14 times in the document, in an effort of making the rural legible for intervention.

Earlier critical accounts of the initiative focused, among others, on the amount of dedicated budget, as one author describes it, "at almost homeopathic doses" (von Meyer, 1997, in Ray, 2000: 165). Territoriality and ethical approaches to development are the key characteristics of the program. Against claims of a non-political character, rural development is brought clearly into the political domain. Ray (2000: 169) calls researchers to look beyond the 'endogenous development' official discourse - that solutions and resources for rural development lie in rural communities. For example, extra-local actors may use the endogenous approach as a shield for their locally applied agendas. Twenty-year-old case studies from Spain (Pérez, 2000) and France (Buller, 2000) already highlighted that local and regional administrations co-opted LEADER in their agendas, as well as the vision of LEADER as just another funding stream reinforcing the status-quo. Recalling the warning of Kovách that "[t]he *technocratic model* of the integration of Eastern-Central European rurality that underpins Phare and Sapard programmes actually represses the involvement of any other rural development actors" (2000: 186), we need to question if and how the practice further extended after EEC states joined the EU.

From their view as monofunctional areas dedicated to agriculture, rural areas have been designated as targets of a multifunctionality approach. An imprecise or even quite absent definition of a multifunctional rural area has survived for a surprisingly long period of time after it was introduced in policy language (Wilson, 2006). Tourism consisted the most opted for solution during the first LEADER phase. Taking into account the previously outlined context of rural policies, we could argue that tourism served as an attempt of exorcising the productivist character of rural areas, rendering their population less economically reliant on agriculture and preparing them for a different type of activity. It represented a project of increased museification of the rural since 2000 (Cejudo and Navarro, 2020) and a direction towards transforming it into a territory of consumption for urban populations.

The conviction that the implementation of LEADER represents a faithful mirror of policy intentionality spans a considerable width of the research body. Numerous studies enact a reification of the exogenous-endogenous schematic by focusing on evaluating its efficacy. Evaluation is a key policy cycle phase, particularly due to its forward looking gaze which legitimizes the approach in preparation for subsequent implementation. However, as High and Nemes (2007: 110) point out, LEADER evaluation does not endow local actions with a substantial role in the evaluation framework, maintaining instead an exogenous character because the centre needs to justify spending as effectively. It reflects a similar practice in housing research that Allen (2009) names elitist epistemology. Even though the initiative is focused on economic development, evaluation reports cannot asses its economic output and impact for the very reason that in terms of funding for economic activities, the measures are positioned under other axes. In the evaluation of the National Rural Development Program (Ministry of Agriculture and Rural Development, 2017), their impact assessment refers to results of measures from Axis 1 and 3, meaning that LEADER could be construed as an instrument for increasing effectiveness.

Rural studies generally celebrated the occurrence of LEADER as progress towards endogenous development and marked it as the abandonment of exogenous approaches. There are two complementary arguments to be made on this dichotomy. One lines up with the critical assessment of endogenous development initiated by Lowe et al (1995) and aptly expanded by Margarian (2013), while the other questions the functioning of a reformed endogenous approach, as long as it is based on a theory of growth. Several key concepts support this manoeuvre, most of them lying at a mezo level of conceptualization, where human capital, social capital, territorial governance and innovation, all add up to inform a territorial capital.

New Growth theory conceived in the 1980s, New Economic Geography born in the 1990s, and endogenous development, all could be assessed as conceptualization of what Harvey (2001) addresses as the capital's spatial fix. The Barca report (2009) convinced policy makers, along with numerous academics, that place-based policy approaches represent the solution to overcoming territorial inequalities. Endogenous development was presented as a shift from sectoral to territorial support. Yet, as Lowe et al. (1995: 95) put it, "the discourse of endogenous/exogenous development is inextricably rooted in geographical boundaries and this prevents a full understanding of the complex relations".

Moreover, as described in the previous section, endogenous development through LEADER goes in parallel with the exogenous approach embedded in the CAP (Gkartzios and Lowe, 2019). There is thus a contradiction between the structural factors concretized through the CAP and the alleged autonomy awarded to local communities in rural development projects. The tight framework offered to local forces means that they are condemned to make the right choice. As Slee (1993: 51) highlights, "[m]ore often, 'endogenous' development is a means of achieving more effective development of a conventional type". The economistic colonization of rural development studies is shielded by what Lowe (2010: 319) describes as an empiricist departure initiated by researchers in the US. Most literature evaluates the penetration of the LEADER model, particularly that of its governance mechanisms, its implementation's hiccups, resistance or embracement. Positionality in the production of knowledge in rural policy would surely serve as key topic for future research.

As Lowe et al. (1995: 91) point out, and Margarian (2013) expands, the root of the conundrum branching out through European rural development policy is the lack of clear theoretical foundations for the occurrence of endogenous development. The introduction of endogenous development in European policy did not set out clear references to major restructuring processes taking place in the 1980s, such as deregulation, Western deindustrialization, or retrenchment of redistribution policies. With few exceptions, numerous studies of LEADER exhibit an empiricist nature and reiterate a debate translated from development economics, the exogenous-endogenous approach, situated in a growth paradigm. Margarian (2011) alleges that the endogenous approach is a normative reaction towards the perceived lingering malignant effects of previous exogenous interventions. The exogenous-endogenous debate makes sense when LEADER is officially portrayed as a development 'laboratory', as the two explanations are based on testing different variables. What the neo-endogenous development perspective brought was a promotion of technological change - that is why innovation is key - and human capital from exogenous factors to endogenous ones. Along came a perspective on the governance of rural development, a form of development policy in practice that social scientists were late to acknowledge (Gkartzios and Lowe, 2019). As Navarro and Cejudo put it, the initiative is meant not to tackle spatial differences "but to create value around the uniqueness of these territories and the wellbeing of local actors" (2020: 302), which can be interpreted as the production of structures for a capital spatial fix through a recommodification of the countryside.

Thus, the endogenous approach to rural development can be traced back to the description of the problems that affected both rural economic output and its relation with urban counterpart, particularly the issue of overproduction and accompanying market changes. Territories are now pushed to take fate into their own hands, along with the responsibility for non-development, which no longer lays with the centre (Cejudo and Nvarro, 2020: vii). Mobilizing the countryside and activating local stakeholders have been key principles of LEADER (Dax et al. 2016: 57). Endogenous development has been extended in EU policies after the Barca report, which is based on endogenous growth theory and ignores exogenous forces (Avdikos and Chardas, 2016). Regardless of the effectiveness of the endogenous model, one of its key effects is the delegitimation of measures construed as exogenous.

The second, and wider, argument concerning the exogenous-endogenous debate refers to its rooting in the growth paradigm. When growth is established as the economic necessity and the core direction is that of unravelling new avenues for value production, new value can only be instantiated through exchange. Besides obvious ecological concerns, expanding growth structures solidifies present structures that concentrate value in urban areas, whose production modes are dependent on their hinterlands. Ye et al. (2020) argue that extractivism moved from global marginal spaces and is now a main feature of global capitalism, where control over flows is the basis of today's power. LEADER aims to solve the problems admittedly created by overproduction, while simultaneously opening up avenues for capital reterritorialization, thus perpetuating growth politics. In this manner, it represents a laboratory of refinement. Even green growth, the most recent wave of policy platforms around the world, is fraught with naive assumptions at best: an incoming decoupling of GDP growth from resource use is hardly supported by evidence (Hickel and Kallis, 2019). Although the degrowth literature focused so far on diagnostics and policy proposals, it lacks a supportive theory of the state (D'Alisa and Kallis, 2020), which would provide avenues for implementation and means of countering the present growth oriented politics. Moving beyond the critique of present rural development policies towards degrowth social models would require their confrontation with institutional power structures.

Implementing the endogenous agenda: localism, participation, social networks

The complexities of implementing the endogenous agenda through innumerable institutional layers readily convey its required top-down planning. Revelatory is the fact that some LAGs "see themselves as intermediaries rather than bottom-up partnerships" (Bosworth et al., 2016: 6). Geddes counters narratives that local partnerships reside at the core of new localisms, describing them as merely "a form of fragmented local crisis management" (Geddes, 1996: 797). People of marginalized rural areas find empowerment and participation enticing because they often feel left out of decision processes directly affecting them. In this context, underscoring the significance of local partnerships for endogenous development boxes out the critique of certain grand narratives. These development prescriptions would require the territories' inhabitants to be of the highest ethical order, while non-local economic actors determined to invest locally by a quest for a spatial fix, are exempted.

Participatory approaches in development projects had been cultivated during implementation in the Global South. The 1980s development principles reflected the emergence of verdicts that states are not adequate instruments of providing development at local levels. The answer has been a direction towards populist approaches to development through participation (Hickey and Mohan, 2004). While participation can augment independence of local actors in determining the goals and means of the process, its mainstreaming in development thinking applied a technicization that eschews wider structures of injustice (Hickey and Mohan, 2004: 11). Mainstream participatory methods inherently support the depoliticization of larger structures through efforts to relocate agency. Not dissimilar in ethos, LEADER's participatory framework alludes more to astroturfing than to a conveyed local will. The bottom-up approach is pushed from above through nudging, yet sold as output. It shifts responsibility at local levels, both in terms of diagnosis, as well as solutions. As Margarian (2013: 5) points out, participation is deemed essential because it increases the effectiveness of the action. It is no wonder that professionalized external consultancy firms often play a crucial role in setting up the initial stages of LAGs actions.

If there is some conceptual form of power relations to be tackled through participation in LAGs, the only internal one in the imagined communities at play refers to conservative patrimonialistic economic actors and progressive ones. Complementarily, other power relations at stake concern the local against the state in terms of governance practices, and the local and global in economic practices. In this case, the role of nudging is to disrupt existing social networks in order to support the creation of new ones suited for embeddedness in economic structures allegedly new to the area. If we scrutinize the economy of participation - who has the resources to participate and on what terms - we discover that very few disposes of the required means. That the very poor are not directly targeted is certain, but even the presumed middle-class encounter problems in benefiting from participatory actions of LEADER. The ex-post evaluation of LEADER II underscored that "[i]ronically, the complexity of programmer delivery acted as an invisible hand in favour of complementarity and for selecting the most committed project promoters" (Österreichisches Institut für Raumplanung, 2006: 232). It can be argued that the result is not 'ironic', but planned and expected. Barke and Newton (1994) indicate that LAGs that already possessed a form of bureaucratic experience held an advantage, a fact acknowledged later on by the LEADER II ex-post evaluation (Österreichisches Institut für Raumplanung 2006: 145). Behavioural changes are deemed significant gains from the first two iterations, "[t]he successful implementation of the LEADER method was a success in itself, for it meant behavioural change" (id., p. 225).

As Somers (2005) warns in her acid critique of the conception and uses of social capital, sociologists should oppose the advent of social capital which is nothing more than the economists' Trojan horse attempting to marketize the social. "The breadth of the terrain on which rational choice theorists set their sights should not deceive. This was in no way a genuine venture into the theoretical world of the noneconomic; rather, this was the project of what Gary Becker called an 'economic imperialism'" (Becker in Swedberg, 1990: 39) Social capital comes with an anti-statist, anti-rights, and anti-institutional character (Somers, 2005: 13). Power relations are also evicted from the conceptual schematic.

Conceptualization of social capital in LEADER literature is so weak that some authors cannot seem to allocate it a clear role: "[v]iewing social capital as both a prerequisite for and outcome of applying the LEADER approach is not contradictory" (Marquardt et al., 2012: 401). The same analysis suggests a glorification of local partnerships where public actors are set aside:

> [i]n Romania, hierarchical political administrative structures, especially with the leading role of the mayors and the strongly positioned county councils, are therefore an obstacle to LEADER […] Generally, local actors seem to lack initiative and need leadership. Passivity strengthens the traditional political institutions and inhibits better governance. Overcoming this deeply rooted heritage of the socialist era can hardly be achieved by capacity building in the pre-implementation phase; rather, it is a long-term process. (Marquardt et al. 2012:422).

As if building 'better' social capital would, alas, solve the LEADER implementation problem, a view which renders the whole initiative, both figuratively and literally, as a multi-level marketing scheme selling entrepreneurship as solution.

Numerous authors point out that bottom-up, participation, and (especially) innovation are buzz-words. Yet they not only survive, but are rolled over in the next policy cycle. Innovation remained a long lasting key policy prescription, even though it is regarded as a fuzzy concept. According to the LEADER II ex-post evaluation,

> [m]ost groups embraced a pragmatic interpretation of innovation. Innovative meant "new to the area"" and compared to the first iteration, space for innovation was reduced due to increased national bureaucratization. (Österreichisches Institut für Raumplanung, 2006: 165).

In practice there was no strict attachment to the innovation requirement. One EC official said that it was not innovation that most rural areas needed, but just "well managed rural development". In the daily practice, "innovation became a synonym for complementarity." (id., p. 165). Then why is there so much emphasis on the troubled concept? It seems that its main pedagogical role is to urge the abandonment of the 'old' exogenous thinking.

Relocal methodology

The article will further lay out some key findings on the implementation of the endogenous agenda. The empirical data comes from the Relocal.eu research project focused on assessing spatial justice through case studies. I undertook the field research in 2018-2019, which entailed 20 interviews, mostly with public employees in the area, and two group discussions with stakeholders surrounding Mara-Natur Local Action Group in the county of Maramureș, in North-western Romania. The interviews' main themes focused on perceptions of spatial justice, instruments for development and cohesion, the functioning of the LAG, and the sense of local autonomy. The key research topic represented the assessment of spatial justice perceptions. This data has been complemented with a review of grey literature ranging from local, regional and national to EU level publishers.

Romania - context and agro-rural-territorial policies

Romania is the EU state with one of the highest ratios of rural population - 9 million rural inhabitants in 2018 out of a total of 19.5 million, making it a key target for EU-led rural interventions. The country holds a record for emigration rate, mostly to older EU states, both from rural and urban areas, which raises the question of who decided to stay or, rather, got stuck in rural areas. Specifically, who would be available for development projects and what type of development would they favour? Small plots represented quintessential assets in coping with austerity policies in the 1980s by supporting recently urbanized relatives, but also during deindustrialization, mass layoffs and return to the rural in the 1990s, as well as in the context of general low-wage policies from 2000s onwards. Most familial agricultural practices are subsistence oriented. According to EU statistics, Romanian farming is deeply unequal, as "nine in every ten farms (91.8 % or 3.1 million farms) were smaller than 5 ha, but the 0.5% of farms of 50 ha or more in size farmed one half (51.1 %) of all the UAA in the country" (Eurostat, 2018: 19). Basically, it is a two tier farming system. Land registration is not completed, which deters the circulation of land on the market - owners could benefit from subsidies, but, on the other hand, it would support a policy of enclosures (Amin, 2017). Land grabbing is, nevertheless, a common occurrence, and one of the core explanations for tenure duality. Moreover, candidate countries had to dismantle barriers protecting their agriculture from subsidized Western agriculture, leaving farmers in precarious positions. Besides administrative decentralization, a significant contribution to inequality comes from national territorial policies such as the institution of metropolitan areas as soft policy spaces or the territorial planning instrument RO2035, which envision a polycentric development model (Ministry of Regional Development and Public Administration, 2015). Analysing European Quality of Life Survey data, Shucksmith et al. (2009) concluded that urban-rural differences in the 12 richest EU states are minimal, but the difference was substantially higher in poorer countries, such as Southern MS and the NMS. If LEADER was originally conceived for the issues faced by Western European rural areas, principles have not been adjusted for states with different situations.

A local application of endogenous rural development policy: views of public partners in a Romanian LAG

Romania underwent drastic deindustrialization in the 1990s and 2000s. The Maramureș mining industry employed around 30,000 people at its peak and has thus experienced dramatic changes when the sector shut down. Depopulation is country-wide specific, yet county demographic projections are even bleaker at -10.6% in 2030 and -33,9% in 2060 (Institutul Național de Statistică, 2017). In 2016-2017 the county had, at 65%, the country's highest ratio of employees earning the minimum wage (Patronatul Investitorilor Autohtoni PIAROM, 2018). Research on territorial inequality points that even though the North-western region is the least affected by poverty and social exclusion, the region is highly polarized around the most developed county, Cluj (Ministry of Regional Development, 2017). The LAG's territory reproduces the country-wide territorial inequality. The suburban villages neighbouring the county capital are substantially more developed compared to their furthest counterparts. Just around 12% of the total population is employed predominantly in the three villages and the town surrounding the city of Baia Mare (Mara-Natur LDS).

The Romanian Government initiated LEADER with a three-year delay during its fourth iteration in the 2007-2013 programming period and 239 Local Action Groups became operational in its subsequent programming period. During the PAC Health Check in 2008, Romania adopted the position of maintaining the status quo. Based on each of their Local Development Strategy, they open calls and select small-scale projects to be funded with an average of several tens of thousands of Euro. Social services provision reflects the wider trend, as they have already been externalized or relegated to a high degree towards NGOs. Welfare is now expected to be carried out through project-based initiatives, as well as through external funding as much as possible. In the locality's villages with poor Roma populations, NGOs managing Norwegian Grants implement social inclusion projects.

Mara-Natur was formed in 2011 at the initiative of the municipality of Baia Sprie, a small city in the county of Maramureș, North-West Romania. The five communes in its componence catalogued as poor according to the Local Development Human Index, are located in the Southern and South-eastern parts, the farthest from the county capital Baia Mare and from any other major city. The population density of the territory accurately reflects it: the less dense the population, the poorer the respective area. The economic disparity of Mara-Natur's territory is amply documented in its LDS, revealing that most economic activity takes place in the vicinity of Baia Mare. The other city in the region, Târgu Lăpuș (population 12.000) is practically surrounded by villages associated in Mara-Natur. As a relatively remote, as well as actively de-developed area primarily through the cessation of mining exploitation, its development parameters are highly sensitive to upper-level political decisions. As a commune mayor explains, attracting external funding is a main motivation for joining the LAG: "[w]e succeeded. We had to. [...] Because it is another easier funding source on European funding". Other stories depict mayors who were particularly sceptical or not interested – with the explanation that they are either too exhausted or anxious because of extra responsibilities. In the end, it appears that discovering the opportunities, costs, as well as limits, lead most of them to view the membership to the LAG as a positive. One stakeholder puts it simply that "there was a strategy creator and an explanation creator towards authorities for why it is good" and the money stood as bait to overcome reluctance. Initially, the idea of LEADER arrived in the area through presentations prepared by consultancy firms who described it as opportunity to access funding. As interviewees pointed, similarly to numerous other LAGs, it assembled around public actors.

In the first stages, Mara-Natur supported each of the 18 local administrative units to apply for small funds. Recently, its calls for applications shifted focus towards the development of small businesses and entrepreneurial development. According to the 2016 LDS, the objectives regard the conservation and promotion of natural and cultural heritage, increasing the area's economic output, supporting social equity through social services, and developing the area's good governance. As the Mara-Natur team representative underlines, "LEADER is complementary to the large NPRD. Mara-Natur's funding objectives specifically did not include infrastructural projects because town halls can access other designated funding". Indeed, LAGs are not singular development instruments, they exist in a complex and thick layer of myriad initiatives unfolding in parallel. Besides other agricultural and rural programs, the Ministry of Development offers a National Program for Local Development. With every funding opportunity comes a requirement to conceive planning documentation, which coexist with each territorial administrative unit's own strategy, as well as county, regional, and national level. Over-planning is a disempowering mechanism which absorbs scarce and valuable resources at local level, particularly in project-oriented funding system. Moreover, local administrative autonomy is stifled by low financial autonomy. Interviewees point the lack of ministerial coordination in development plans. Often, reverse-thinking leads to adopting legislation to prevent infringement without checking the capacities of local administrations to solve particular issues, such as environmental ones. Some regulations actively impede infrastructure development because of technical evaluation which excludes forms of territorial arrangements such as scattered villages. And some technical solutions, although superior, are not legally allowed, for example using sewage pits produced in the area, although the producer exports them to mountainous areas in Germany and Austria. At the end of the whole series of efforts, as the LAG representative describes, lies the final beneficiary, who is, more often than not, a regular person adapted to subsistence livelihood and who finds the price of overwhelming bureaucracy as too costly to even bother.

As recounted by public administrators, the transfer of responsibilities from central to local levels is not properly coupled with the assurance of adequate funds for responding to these obligations; therefore, they all acknowledge the need to apply for alternative financial resources. Yet again, some are more capable of writing competitive projects, others dispose of funding for externalization. For richer communes, Mara-Natur is the cherry on top, just another opportunity for attracting external funding, while for poorer ones it turns into a source of frustration: funds are symbolic relative to their needs, and the administrative effort too costly. At a larger scale, the increased bureaucratic procedures and the need to co-finance the funded initiatives favour by design the public administration and the more experienced private economic agents, while they discourage the poor, who have fewer incentives to apply for funds for their plans. Even for LAUs, particularly the poorer ones, a 2 percent mandatory co-funding rule might be an issue. Because there are numerous mayors involved in LAGs, the ministry cannot politically refuse to support them. But, as respondents say, there are pressures from meat producers or others to direct increased funding to them. They assess the state level agro-rural policy as uncritical towards EU policy, where it acts as translator because changes are not adequately discussed with beneficiaries and deadlines are short. Moreover, the Ministry of Agriculture does not assume long-term commitment during debates on the next programming period for this rural policy instrument, which has already created a class of local rural development specialists - around 1000 in LAGs only. This concern unravels shaky sustainability of the whole program. It is unfortunate, according to interviewees, as LEADER does contribute to achieving spatial justice through more equitable measures than the national ones.

In the absence of local capacity to engage in project application and implementation, local authorities gain significant support roles, as interviewees conclude. The situation seems widespread, a study covering 20 villages in a southern county (Mihalache, 2016) revealed that accessing development projects turns into a prerequisite in attracting future funding, due to gaining administrative competences. Local authorities might end up signing partnerships, but the partners might not fulfil the project indicators and everything will fall back to the public administration, particularly financially, as it has happened - according to an informant:

> [w]hy should I, as local authority, contract consultancy services, as long as the responsibility for the funding contract remains exclusively with the beneficiary? [...] Because, although for colossal money and in the moment of verification and audit, the consultant is free from obligation, no responsibility.

Interviewees acknowledge networking as an added-value of LEADER due to the LAG's meetings which represent opportunities to exchange ideas.

Sometimes, calls for projects need to be rescheduled because no applications are submitted. From the management perspective it is not an inherent issue, yet even an indicator of perseverance, while others directly conclude that "the fact that people do not apply for funding should make us think". On the other hand, insufficient will of association between inhabitants is considered an important hindrance to local development and is bluntly stated in the LDS. EU programs attempting to induce rural economic cooperation after the socialist Agriculture Production Cooperatives have been dismantled is more than ironic. Opening up guest houses has been a success, yet there are currently no funding lines for this demand - an underlining of the lack of autonomy, or lack of support for development - instead, climate and innovation measures appear now to be the measures eating up a substantial part of the rural development budget, which is not deemed useful for this area: "you should give 40 per cent on innovation, environment and climate change, where we don't have experience, we don't even know what we want, we don't even know what the word 'innovation' means...". A note here: while the area's environment will continue to suffer from previous poly-metal extraction, mining conservation is a governmental responsibility.

Attracting applicants is challenging because of co-funding requirements added up to the lack of bureaucratic experience, as well as to the impediments in 'animating the community' - while work-led migration sucked away a sizeable chunk of the working-age population. Thus, the idea of turning the LAG into a local scale management authority, a 'mini-NRDP', represents one 'temptation' for LAGs which is to be avoided if a LAG desires to actually work organically, as intended. It would be 'the easy way out', according to a representative. Petrescu (2015) encountered strikingly similar confessions during interviews with representatives of Romanian LAGs. Why is this apparent trick so out-spoken? Because fund absorption is the prime political objective, whereas ideational agendas regarding principles of rural development are secondary at best. From this perspective, LAGs are Mini-EUs in a structure resembling a Matryoshka doll opening up European Commission - Romanian Government - Regional RDP Agency – LAG. Keeping in mind that fund absorption is a key evaluation indicator, financing projects that 'just work' from an administrative point of view is an alluring prospect. Thus, autonomy of LAGs is technically guided towards a certain result and community needs found on the ground have to comply.

Public administrators are presented with numerous offers of accessing the competitive field of development projects, either through national or European programs. Yet, as respondents point out, they are not even supplied with the right tools and resources to counter the centrifugal effects of neighbouring urban growth poles. A problem is that even if all the prescriptions are followed, chances of achieving a form of development drop when exposed to larger economical structures - no integration to local and regional chains, weak infrastructure, tough competition on the market with both national and international mammoth actors, on top of increased polarization already exhibited and promoted by the government which drives any newly discovered resources as much as possible to few regional cities.

Who do the EU policies bear in mind when devising new policies? Respondents underlined that it feels like numerous core concepts and policies, particularly in rural development, are designed with Western European areas in mind. For example, the looming 'innovation' and 'climate' thematic areas are regarded as simply inadequate for most of the Romanian rural parts for a couple of reasons. One would be that pollution has been reduced simply as a result of deindustrialization. The other is that 'innovation' requires significant academic activity, which here is at best insufficient, or simply unavailable. The present gap between the material realities of Romanian rural areas and Western rural areas is much wider than the EU-wide official vocabulary implies. As the LAG representative asserts, the introduction of sewage in some villages could be considered an innovation in the respective setting. So, at the moment, LEADER seems to be applied in Romania as the Romanian villages had merely experienced the same development trajectories as Western villages.

Over-bureaucratization and rigidity are certain issues, as mentioned by most LEADER evaluation studies (Navarro and Cejudo, 2020: 301), which both affect local autonomy. For example, even if the LAG would decide that they want to adopt a more equal territorial distribution of funding, regulation regarding competition would prevent them from doing so. Overall, the present funding management regulations are not just overbearing, but they turn into an instrument of control. The reason is the lack of any real guidance offered during the project cycle and the almost exclusive focus on meticulous verification and evaluation. On top, rules change much too frequently during project implementation. However, while it is expected that regulation suffers adaptations, the speed and complexity of the unexpected changes provokes a surplus layer of uncertainty and stress. The end result is a general decline in enthusiasm for potential applicants to EU funding. The issue of detrimentally excessive focus on control, instead of guidance and collaboration, is also visible when local needs are not taken into account at central levels. Drafts of nationally relevant guides for future funding are not open to the public, and most local knowledge, however well-documented that is, is not really taken into consideration at central levels, informants mention. The manoeuvres could be interpreted as a result of insidious top-down political power schemes, but they might partly be a side-effect of a rather clear process: the lack of assumption of responsibility of the national institutions involved in the process. Concretely, for example, EU regulations are seldom adequately transposed in intelligible guidelines which can easily be applied by funding recipients. The question of why the relevant ministries hastily adopt and implement EU regulations without significant negotiation with the European Commission, as other states often do, needs answers from other sources. Yet, the issue reverberates and amplifies at lower levels. From this point of view, interviewees portray a colony-metropolis relation between the Romanian state and the EU institutions, as orders from above are simply being obeyed.

Personnel and competences are a central concern to people involved directly and indirectly in Mara-Natur. Autonomy in spatial justice processes is unattainable without the required human power able to steer it through development projects. But the whole set of procedures launched by the European funding schemes favours by design the externalization of human resources to private consultancy firms, who bear no accountability. Thus, instead of becoming a stone at the foundation of local autonomy and spatial justice, it shatters them. Consolidated institutions would be better equipped to act towards a more equal territorial development. Concretely, if local public administrations could permanently employ motivated teams of specialists in funding management and other fields related to territorial development, their capacity to roll development projects would greatly improve. The LAG would better serve the territory by obtaining the required support to hire people who would bring the necessary expertise. For example, respondents demand a permanent architect and territorial planner who would serve those town-halls who cannot afford to hire them independently.

For the local actors, LEADER so far constitutes an exercise in administrative capacity to attract external funding, develop projects, while interacting at a different and novel scale. Practically, the LAG operates as a localized intermediary management organism in the EU funding distribution chain: it opens calls and selects small-scale projects according to its LDS. Whether LAGs are supposed to become self-supported after a while is unknown. Besides attention to the implementation of the local development strategy, management teams have to consider the LAG's preservation by carefully pacing activities during the seven-year funding cycle. The county council has recently joined the four LAGs operating in the county as partner and its financial contribution is regarded as significant in supporting the organizations to overcome potential funding interruptions. Interviewees are concerned that increased modulation between the CAP pillars would be a crushing blow to the LAGs, few would survive. Overall, this potential direction is in direct opposition to the needs and requests formulated through the LAGs. Higher degrees of financial autonomy and higher funding levels are deemed necessary to further the LAGs impact and benefits on local development. LAGs' managerial work needs pin-point precision to successfully attract the meagre, yet much-needed funding, while respecting the program's principles and strict conditionalities. The incurred cost supported by actors for the pedagogical process involves the assessment of benefits and the adaptation of institutional thinking to a new format. The cost of applying a highly complex format designed for skilled administrative personnel to de-developed areas deficient in administrative capacity is unknown, and without clear long-term scope of the whole program, it is unpredictable.

Conclusions

The brief incursion into the CAP's history set the scene to evaluate the drift between the formation of policy principles. Analysis of LEADER policy characteristics, particularly its endogenous approach, showed that its origins lie in an economistic view of development which rearranges rural development options in a tight framework meant to suit wider policy agendas. This article examined the 2014-2020 implementation through a case-study focused on perceptions of public actors involved in a Local Action Group in North-western Romania. LEADER is portrayed as intention of spurring locally identified potential growth factors. What the overview of the CAP conveys is that this example of endogenous development has been born, at least partially, as reaction to structural factors, ranging from global geopolitics to EU internal politics, not from direct concern with effects of uneven development. Initially introduced as laboratory for rural renewal, LEADER constitutes a compromise intended to sustain the productivist character of agricultural policy in front of critique stemming from a wide range of actors. In this sense, it is not a novel approach in itself, but a novel application of an already instituted economic system.

The case-study reveals that resource-poor rural areas are bestowed with the impossible task of kick starting sustainable small scale economic development without the adequate resources for financial and administrative economic participation, while navigating a convoluted bureaucratic system. Rural public administrations, often the sole actors with administrative capacity in their area, are deemed conveyors and risk-takers for development projects, particularly in public infrastructure, a required element for any subsequent economic project. Their required involvement in the program without support for increasing administrative capacity through investment in personnel, reflects LEADER's attempt of bypassing state institutions. Innovation, a core LEADER principle, alludes to smart solutions for improving an already working economic structure. In the present dire context, it constitutes an unnecessary bureaucratic burden in attraction of funding. Exogenous factors, which are the initial determinants for the area's dereliction, and redistribution, are regarded as quintessential for improvement. In Romania, LEADER runs in a policy ecosystem flooded with exogenous and uneven development planning, be it most of the CAP or the national growth-pole territorial strategy. Efforts should inherently tackle at their core the centrifugal forces which agglomerate resources in urban centres.

As any large-scale amply funded policy with substantial legitimacy, LEADER is mandated to be successful. But the long-term life of the program is unclear. No clear pathways towards the type of emerging (rural) society, its economic structure, or its relations with urban counterparts, are outlined. The incentives for people and institutions to assemble in a LAG according to these principles, if no funds were attached, are not elucidated. Crucially, if the initiatives constitute examples of good practice, how could non-beneficiaries of financial support follow through? Endogenous thinking still runs largely uncontested because its allusions of empowerment and autonomy are concrete yearnings. The LEADER framework skilfully answers to empowerment demands by presenting entrepreneurship as empowerment instrument and an increased competitive structure. It promises a renaissance project where peripheral positions do not ontologically stand as hindrance and actors appear if not equal, at least as belonging to the same field. These features place rural actors in the high risk position of failing once again to achieve development. Redistribution necessities, to which LEADER meagrely contributes, trump the need, and available resources, for overt contestation of principles and procedures. Substantive redistribution is off the table, as it would run against the mechanisms of the capital's spatial fix.

While the LEADER configuration deems local knowledge and community building as essential stepping stones in tackling uneven development effects, it fails to properly acknowledge (and even discursively obfuscates) the necessary resources and capacities - as well as the overwhelming influence of outside factors - and even geopolitical contexts (such as East-West histories), mandatory for the production of spatial justice. It arrived as a tool for governing rural populations as 'surplus population'. The economistic view of development offered through LEADER acts as mechanism for coping with prolonged austerity without actually tackling its roots. Overall, the program represents an instrument for depoliticization, a mechanism of reshuffling institutional memory which redraws territories of responsibility and blurs macro socio-economic contexts. LAGs are bestowed with technical managerial roles deemed to steer free-floating areas. If unfettered economic growth continues as main development principle, with few exceptions, areas affected by uneven development are at risk of maintaining their present position. Emphasizing participation and the consumption of social networks for the program's implementation highlights both the different local perception of the problems' origins and the policy intention of re-encapsulating solutions along with increased local responsibilities. However, neither principles, nor procedural propositions, seem to reduce widening territorial inequalities. Ultimately, LEADER represents a pedagogical exercise in uneven development.

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THE (RE)PRODUCTION OF MERITOCRACY: CHALLENGES FROM THE ROMANIAN HIGHER EDUCATION SYSTEM UNDER NEOLIBERALISM

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ABSTRACT. The paper follows the institutionalization of meritocracy in the Romanian higher education. Using the Romanian experience, the study explores the setting of meritocracy, highlights the revised institutional genesis that led to the adoption of a so-called post-traditional approach, and it reviews the deployment of practices that steered higher education in Romania. In support to these, a reflective stance is employed alongside secondary sources to scrutinize the techniques of control and practices which inform institutional evolution. The research attempts to shed light on the increase of doctrinal entrenchment through which meritocracy justifies academic stratification in a pauper system aspiring to world-class recognition.

Keywords: meritocracy, higher education policy, Romania, neoliberalism

Introduction

Interventions in higher education (HE) have embraced the umbrella of neoliberalism (Doherty, 2015) mobilizing discourses of excellence and marketization by extending the logic of competition (Littler, 2018). They embody a powerful strategy that aspires to reinvent the university (Marginson and Considine, 2000) and to proliferate the knowledge capitalism (Olssen and Peters, 2005). When it comes to analyse such directions, meritocracy has gained an increased attention in education, meritocracy being employed to shape the system as an institutional construct (Mateos-González and Boliver, 2019). Aiming to use merit as a link between education and labour (Souto-Otero, 2010), HE policies have pursued social justice and social mobility (Lim and Tan, 2018). On the other hand, these have eroded the base of human relations (Purcell, 2007; Liu, 2011; Littler, 2013; Mijs, 2016) that support the university as a key institution.

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Romanian higher education (RHE) system is no exception to meritocracy advancements, as it has adopted a strategy of rebuilding itself under the pressures of an extremely state-centric model (Dobbins, 2011). The RHE has triggered institutional measures aimed to reorganize the system through meritocracy by pushing forward the research model through income diversification, incentives and performance criteria. These directions have targeted: academic career, decision making, quality assurance and funding. They have become embedded into a so-called "post-traditional approach meant to be meritocratic" (Vlăsceanu and Hâncean, 2015: 188) to accomplish a fundamental institutional objective—university's prestige (Maassen, 2017). The approach, however, has failed to grapple the adaptation to what it should have stirred a superior governmentality through merit. Alongside attempting to produce merit, the approach has triggered a maladaptation that mirrors a self-claiming prestige through adaptation to rankings by leading their members to publish in journals barely meeting academic honest standards (Djuric, 2015), pay to be published, receive "international" prizes (Micu, Miclăuș and Ancu, 2018) or devise complex criteria to allow deceptive promotions (Geven and Maricuț, 2015).

Assuming a reflexive perspective, this paper scrutinizes the development of meritocracy as an institutional vector for power and stratification, dominating the period after 2000 in Romania. RHE represents a worthy case to investigate, not just for what it can teach us about a specific context, but also for offering a useful perspective to develop our understanding of meritocracy more generally. RHE context allows connections to a major issue of the HE research, namely the need of analysis upon the intended goals and the unclear effects produced by reforms (Fumasoli and Stensaker, 2013). This calls for critique to expose the directions HE took in less studied spaces. Comparative studies and those focused on Romania have scrutinized the system (Dobbins and Knill, 2009; Dobbins, 2011; Deca, 2015; Dakowska and Harmsen, 2015; Králiková, 2016; Sabic, 2016), yet there are no discussions about meritocracy as part of the reforms. Echoing Lim and Tan (2018), the paper examines meritocracy as a negotiated ideology associated to an allegedly just system and discusses meritocracy as a veil that deceives with rewards based on the interests of the market and the scarcity of the system. It suggests that the adopted meritocratic path might have been created symbolically alongside rhetorical strategies selected to control funds and augment hierarchies.

What follows showcases how meritocracy has emerged and shifted discourses and forms. After presenting methodology, the paper contextualizes the RHE design and by questioning the practices that surround meritocracy, it examines the revised foundations of reforms and their effects. These inform the deployment of practices centred on the (re)production of a meritocratic academic system. Final remarks draw on the establishment of meritocracy as a state-supervised platform.

Envisioning Meritocracy

As a term, meritocracy evolved from the sociology circles in the United Kingdom. Back then, meritocracy implied referential critique (Floud, 1956; Fox, 1956; as cited in Littler, 2013) on expression and context framing a social-democratic awareness on the topic. The concept gained prominence through a work of fiction (Young, 1958), but as the book was misread (Donovan, 2006) and the term migrated outside academia, the meritocracy form shifted, becoming norm and vessel of political and economic interventions. These changes emerged within the USA culture where merit related to the functional requirements of the society. Arriving at a result of overemphasising the positive aspects, it pinpointed that advancement and justified reward had to be earned based on inborn traits and individual effort, with the organization ensuring equal chances.

The new form of meritocracy received a boost by being altered once again in the UK. Finding support during the Thatcherism period, meritocracy informed successful consumption (Littler, 2013). Basically, meritocracy developed as a function of accumulation through which population joined the neoliberal shift. Through the 1990s, the meaning of meritocracy rendered in equality of opportunity, a direction preserved for most of the subsequent years. Then, engineered by the British government to support competition, meritocracy accommodated individualism as a path to entrepreneurialism, while still making people believe in merit conceived in a traditional manner (Allen, 2014). As the author states, holding to original definition, meritocracy promoted a void space created by the idealization of justice and the suspension of social cooperation. The neoliberal culture of entrepreneurialism filled this space and used meritocracy as a vector of success.

Several directions inform the success of meritocracy. In the public and political discourse, meritocracy enhances democracy in administration by limiting corruption and inducing good governance (Charron *et al.*, 2017). Economic growth and policies also amend meritocracy as a measure of progress. Coupling meritocracy to the creative class boosted the interest, advanced the economic emphasis and its integration into mainstream discourses targeting job activities. Hence, the positive part of meritocracy developed as a check point for the justice of institutions, seen as necessary for "preventing self-loss and subsequent dissatisfaction" (Allen, 201: 380). Under these directions, the term inflated, but it neglected prior critiques that showed meritocracy was an incompatible relation to the free market logic (Souto-Otero, 2010 commenting Heyek's perspective on the topic). Hence, meritocracy fortified during the ideological expansion of neoliberalism, striving to enhance—paradoxically–egalitarian values under a stratified vision of the society.

The appeal of meritocracy revolves generally around its moral legitimation of hierarchies and its apparent ability to optimize the allocation of rewards (Mijs, 2016: 17). For this reason, meritocracy has appealed as a technique of positive power synonymous with market justice (Smith and Matějů, 2012) requiring distributive justice. Others have however advocated thoughtful reflection on grasping meritocracy and its dimensions (Liu, 2011). Through this call for careful inspections, Son Hing *et al.* (2011) has unveiled that meritocracy leans towards an ideology that legitimises hierarchy and inequality or a combination of them. Littler (2013) has confirmed that meritocracy is a way to extend the interests and powers of elites through rankings of key professions, fields of study and subjects. Consequently, the salience of meritocracy revolves around reinterpretations and modes of change under political and economic discourses that make meritocracy to entail a tautological structure (Littler, 2018). Such a transformation is likely to vitiate the qualities of individuals, disrupt collective work, and link them to power spheres (political, economic or education) that project failures on individuals. It leads to a subversion of the logic of the relevant spheres, among which education appears to be the most challenged one.

While it has been considered to improve social, politic or economic spheres, meritocracy has regained its controversial fame of meaning anything under neoliberalism. It is a significant part of neoliberalism, seen here as the governance of markets (Povinelli, 2011), attempting to change HE through discourses and policies towards economic calculations (Centeno and Cohen, 2012). Indeed, meritocracy is a doctrine that colonizes current transformations of education. Documenting the neoliberal shifts taking place in HE, several authors have revealed transition from exchange to competition, from equality to inequality, from labour to human capital (Berg, Huijbens and Larsen, 2016). Following these, the critique on the HE neoliberalization has disclosed the negative consequences that convert people and knowledge into capital (Fraser and Taylor, 2016). Especially Giroux (2014) has linked neoliberalism with a social amnesia responsible for shallow interactions in an attempt to eliminate any critical progress, with education as the main opposing bastion. Similar attacks have made others argue that universities have developed barbaric mutations under the spectrum of "meritocratic extremism" (O'Sullivan, 2016). The reinvention of the university as an enterprise (Marginson and Considine, 2000) is therefore continuously reproduced under the neoliberal agenda. Such a context allows this paper to pinpoint the urgency to explore other contexts where meritocracy is diffusing, the case of RHE contributing to that.

Methodology

Considerable discussion circumscribes around the positivist direction and the replication of studies. In this paper we discard such an approach that obscures the critical endeavour (Lefebvre, 2014). Instead, we think that valuable contribution materializes when commenting the techniques of control and practices that "disclose the cognitive means and procedures and the social forms or relationships through which ideals are developed and stabilized into the conventions that we call institutions" (Hasselbladh and Kallinikos, 2000: 707). The contribution therefore emphasises what construes HE as practices of everyday life where meritocracy (re)produces.

Supported with secondary sources, the path relies on reflexive inquiries to criticize the nexus of structures and relations that infused the development of meritocracy. Although a problematic approach, reflexivity helps to improve clarity over the topic and addresses obscured practices as it is the self-replicating clientele system hidden under reinvented meritocratic norms and discourses. It sets the topic within the "most unlikely case study" (Gerring, 2007), a rationale informed by what we know best and can channel through the international literature. By using the described path, we trace the local insetting of RHE meritocracy under a post-traditional transformation.

Revisiting the Institutional Genesis

The Central East-European (CEE) countries reflect an evolution of contrasting perspectives over the university's role as the main component of HE system reforms. Yet, a common feature reveals universities employed reforms, increased institutional integration and performance. All countries in the region adhered to an extended design framed to depart from the state authority, but taken with measure (Dobbins and Knill, 2009). The exception—Romania—became a classical case of isomorphism that steered the most its governance towards marketization (Dobbins and Knill, 2009). RHE envisioned the institutional implementation of meritocracy in universities, an attempt which we illustrate from its inception. The inquiry, therefore, explores the state governmentality under the vector of meritocracy.

Inception

The reforms of the RHE started soon after the 1989, when Romania saw the opportunity to align to the institutional changes preached in the region and interpreted as beneficial towards international integration and convergence. The difficulty of adaptation originated in the inertia of preserving the state control over HE and breaking the monopoly of conservative forces. Without clear norms, academics controlled hierarchies through age equalled with experience and political/organizational influence, exerting their authority over the evolution of the system. Anchored in the communist tradition of ideological meritocracy (disguised through fierce competition under the Communist Party command), few changes materialized early on. This inertia had profound effects that established an insecure foundation within the reconstruction of RHE. Primarily, it shaped neoliberal radical reforms (Gog, 2015) as the main solution to solve the apathy of the system and sanitize it from its past problems, aiming to reactivate its people by not being looked at as laggards (Dobbins, 2017).

Relaunched in 1998 (Nicolescu, 2002), the reformation comprised interventions focused on decentralization and autonomy. The institutional redesign of RHE expanded throughout tensions between the adepts of extreme transformation and the actors settled around a system of self-preservation. With a basis of reforms already entrenched into a hybrid stage that borrowed neoliberal ideas to shape traditional development (Ban, 2016), it was easy to import neoliberalism with Anglo-American instruments (Dobbins, 2017) and supranational ideas of hegemonic structures and later connect them to European expert organizations. While sketchy, these ideas legitimated contradictory authority and activated subsequent changes. Zealotry (changing whenever possible everything related and coming from communism in the neoliberal directions) and interventionism (facilitating design) framed a common agenda around topics and ideals from above translated locally within "visions of reform" coupled to transition mythologies and ideologies of salvation (Mincu and Horga, 2010).

Pulsations

Extreme design operated remorseless after 2007. Through the consensus of actors gravitating around HE, all parties agreed—with lax opposition—on the directions and goals set by the "National Pact for Education" (involved for shaping the 2011 Law of National Education). Supported by a strong neoliberal alliance of politicians, economists and intellectuals, the reform accelerated practices that envisioned RHE as "the most far-reaching expression of entrepreneurialism" (Dobbins and Knill, 2009: 419) and established intricate rules (Geven and Maricuț, 2015) of shaping the meritocracy of the system. The reform exacerbated the neoliberal path RHE took, altering with differentiated effects its structure under a contradictory image between discourse and implementation. Thus, meritocracy became pivotal in RHE through discourses of excellence and new academic elite formation.

However, problems that combine excellence and equality emerged. To accomplish the legitimation of behaviour, RHE established structures of development to overcome limited and poorly managed financial resources, and comply with international commitments. From this position, institutional design could be easily invoked through discourses targeting merit that reinforced other approaches- "the Romanian experience teaches us that diversification policies in reality act as vessels for legitimizing other changes, such as in the public financing of higher education, usually favouring those institutions that are considered to be more competitive" (Sabic, 2016: iv). That became entrenched into the neoliberal actions of the Romanian state in general and local actors in particular interested to produce competition within the HE system.

The new agents of local design (RHE institutions and their leaders) emerged under the common narratives (competition, ranking, autonomy and accountability). Although much of their endeavour receded under political negotiations, they pursued a statistical performance in an attempt to raise the system. Supporting this reasoning comes a statement of one of the first who drafted the reformation, who argues that education illustrates "a hybridity between a production line and a sport competition" (Bîrzea and Fartușnic, 2003: 84). Alongside supra-national and private actors, the new agents created a transverse set of governmental interactions, partly explored by Szakács (2018). Their interactions might have just re-created "academic oligarchs" dressed in new institutional and elitist ranks using the design as a primitive accumulation of political and social capital. It is what Offe (1996) substantiated about the excessive alteration in designing institutions under radical liberalism which then triggers unintended effects.

The accelerated pace and imprinted habits of the new elites confronting the old ones created an elastic transformation under the state bias towards prestige. Through "elastic transformation" we imply the negotiations and the acceptance of strong interventions coupled with the introduction of biased proposals at various levels, which are common elements in Romanian politics and education. At one end, the elasticity stretched under the fight for positions in the newly created institutions, each representative claiming more meritocracy. On the other side, ministerial status involved isomorphic behaviour under a personal view on organizational myths that evolved to the current status of a post-traditional academic society meant to be meritocratic. These are parts of a system where each minister (29 in 30 years) attempted a distinctive design and a personal rhetoric framed within the elasticity of political assemblage. The elastic transformation was therefore the mode of RHE to use power and impose authority by gaining support from the system components, adding this to the other mode, which is the reference to international context.

Form

Transformation of RHE reveals that its institutional design entailed common agents striving towards marketization and internationalization. Although similar characteristics challenged HE throughout the world (Roggero, 2011), their evolution in Romania transformed the RHE into one of the systems most prone to marketization (Dobbins, 2011). Under the assumed recommendations of European Higher Education Area, the RHE reinforced its design uniqueness as the national perspectives bent under the power of transnational ideas (Sabic, 2016). Notably, Szakács (2018: 220) overviewed the institutionalization of Romanian education as an adaptable script of national interests through worldwide discourses of nationhood and citizenship, supplemented with the institutionalization of Europe as a cultural resource, in an attempt to match the vision of a "good society" entailing meritocracy. As much as it was willing to borrow the international expertise disguised under local interests[2], the Romanian state re-emerged as the main agent shaping the HE (Sabic, 2016; Dobbins, 2017) towards more marketization. It comes with no surprise as Romania embraced neoliberalism (Ban, 2016) regarded as a political power shaping society under the principles of a market economy (Foucault, 2008:131), and through this, the most manipulated sector might have been that of education given its potential to steer the economy and society.

Guided by goals of excellence and performance matching communism, when Romania pursued rankings of productivity, yet anchored in local complications (Ives and Bădescu, 2015; Králiková, 2016), the design of RHE transitioned towards controlling reward and punishment (Gog, 2015; Sabic, 2016). These cemented the RHE re-design, accentuating universities and HE use as political instruments and less as institutions. It increased the view that "the organizational structures of higher education reflect political institutional frames rather than

[2] Many HE projects of WB, UNESCO and other institutions were de facto appropriated by Romanian teams, under a lax guidance of international experts.

educational ones" (Meyer *et al.*, 2007: 195). Nevertheless, the same paradigm of control over the process and product of HE has remained active despite the deceptive retreats of the state from the canvas of design. Actually, because of the complex assemblage operating in Romania, the state has reaffirmed itself as the mastermind shaping the institutional expansion of the RHE. It is also a consequence of missing defensive positions from the universities themselves, not able to articulate convincing narratives about their roles and reimagined adaptation to society (Kwiek, 2012), as actors aspiring to meritocracy.

What the state did with the RHE is an institutional identity shift towards enhancing governmentality under the meritocracy mechanism, translating its prescriptive view on education to facilitate internationalization and liberalization. As radical as it was envisioned, the design could not entirely dissociate from the institutional fabric established during communism (Dobbins and Knill, 2009). It mainly followed institutional isomorphism, enhancing processes driven by legitimacy and the compliance of university to the broader framework of norms and rules. Against this view, Králiková (2016) emphasised the logic of appropriateness which manifested internally in the reform process, arguing that the design emerged as a reaction to the past within a critical juncture at the dawn of transition when new institutional legacies formed and took control over the process. Both accounts therefore substantiated parts of the same design evolution by providing explanatory values to the complex fabric that HE is. As statist legacies mingled within the new framework, the neoliberal reactions against the system entrenched the actors who attempted to design the HE. The evolution happened as the state has never abandoned its legacies despite apparently allowing larger agency. It is what the next section will discuss under the vector of meritocracy.

A critical interpretation of the RHE meritocracy

Young (1958) foresaw meritocracy will become a central tool aiming to transform education and integrate it into a market-based society. In Romania, the institutionalization of meritocracy and its design involved deployment of practices and registers capable to steer HE towards the "post-traditional approach". To capture the extent of practices envisioned as meritocratic, we detail individuals' careers, university alliances and management of meritocracy through a context-based critical approach.

Individual Meritocracy

In the "post-traditional education", career change turned to activate individuals towards education seen as a private good. Meritocracy has served to break the career advancement lethargy and promote research-focused professors. Several career actions involved extracting the best out of Romanian academics. Subjects had to be redirected from their focus on teaching to research intensive directions. This process extended their norms to make professors compete for a decent wage, yet the time frame expanded over the regulations. Normally in a neoliberal framework, aside teaching and administrative tasks, a Romanian professor has to apply for grants, but their completion enforces extra hours of work, carefully reported through neoliberal technologies- 'minutes' (which frame the overload), enabling management of merit and control over the everyday life. Simply, the Romanian academic had to volunteer his or her free time for the betterment of the system, while the university reported the performance and managed the increase in merit.

The meritocracy of individuals was recreated softly in hard-wired procedures to pursue excellence. Through accountable scripts and bureaucratic measures (Geven and Maricuț, 2015), meritocracy enables selections of subjects who align to normalized qualifications. They much publish in journals with problems, yet institutionally supported, pay or negotiate to become publishable, aim to obtain diplomas and certificates of outstanding activities offered to increase merit, and do "voluntary" activities among other examples. These sorts of qualifications add to the merit manipulation through incentives offered to support the directions set by the institutional apparatus in an effort to enhance meritocrats and to create the illusion of belonging to a special category, differentiating themselves as the new breed of neoliberal regulations. Basically, academics are actively manipulated to consider their merit as their "gold star" reward on behalf of the university, rather than the source of their individual hard work and academic prowess. Meritocracy therefore frames merit as a currency negotiated to acquire "measurable" points and allow entrance to the upper tiers where subjects have to continuously bargain the rate of exchange. The success is locally negotiated within bureaucratic procedures and on most occasions defeatism installs or subjects select one side of the elastic transformation.

Indeed, individualisation by manipulation is a result of the current institutional changes. The focus on competition and research assists the idea that it is the only way to build hyper-capable individuals, capable of a meritocratic university. Above all, in the RHE, this would phase out the undesirable subjects, or at least discipline them. The remnants will be free to act on the academic market, designed to bridge the idealized free market. They will enhance the quality of research and flagship the quality of RHE. As parts of the international market, reformed subjects will not burden/shame the system, as they will be capable to financially support academic life. They can shape the "post-traditional approach" and be part not only of the local meritocracy, but will also challenge the international arena.

Management and Meritocracy

The adoption of neoliberal values in Romania sees managers adjust themselves to the projection of old interests and practices negotiated within the academic community of the new market directions. From the managerial positions, meritocracy needs advertisement because it supports the organizational agenda for displaying success, and it confirms the managerial team as praiseworthy. The advertisement of the organizational management is reinforced with many displays of power: announcing meritorious subjects as part of management achievements, taking photos alongside meritorious subjects, informing the community about the success of different grants, and popularizing events. These practices of displaying meritocracy enhance symbolic forms that serve as "organizational myths" (Meyer and Rowan, 1977), embedded into rituals of power.

When the already under-financed grants competitions are cancelled or the contracted funds are cut and redirected, alternatives to push up the merit rely on distinct schemes of involvement (Redacția, 2014). A grant director has to hire bureaucratic personnel and managers from within the organization raising the merit points of such key actors several times by only occupying relevant duties and conveying authority. Hence, the top tier administrative staff wages escalate to numbers similar to those of private managers from foreign companies. Concurrently, the grants directors and activities coordinators have to master the administrative-financial nexus of the university (obtaining countless signatures and approvals allowing the university bureaucrats to claim a role), where they have to provide additional benefits to the organization by involving once again the bureaucratic staff who, usually, represent the base for selecting agents of design and control.

The development of rationalisation and systematisation advances strategies that equip elites with tools of control and alliance formation under a meritocratic agenda targeting redesigned institutional authority. The strategies manifest through distinct forms of codification (administrative participation, quality assurance, experts creation, etc.), enabling idealized narratives (excellence, Europeanization of education, mobilities, employability among others) purported as vital in (re)producing a superior system. There, the focus transfers to university apparatus able to codify merit and deliver it in forms that bind subordination through the recreated hierarchy that strengthens authority. For example, to apply for grants, one has to submit the proposal to the university obtaining first the necessity approval and only then one might apply to the grant competition.

Another situation links to the "allocation of merit" through wages where one has to compete for an extra income (~25% of base wage). Here the competition develops between academic functions, where administrative duties prevail, enforcing allegiances to a group of interests linked to managerial positions. It discloses how merit is still part of a clientele culture disguised under the veil of accountability and meritocracy.

Institutional authority therefore, represented by managers, increases through the alteration of individual merit towards the collective acceptance to meritocratic interests where accountability and managerialism prevail.

It can be inferred that managers enable biopolitics development through meritocracy. They encourage marketing and publicity of career path development. The subjects become storytellers of merit, "of their lives as if they were the outcome of deliberative planning and choice" (Gill, 2016: 42). They are urged and shaped through institutional directives to transfer their professional identity, their experiences and expertise from what they aspire to as researcher and teachers to what authority imposes them to be, for the deemed benefit of the market and society. Hence, the social visibility appears as necessary suggesting discipline– "In discipline it is the subjects who have to be seen" (Foucault, 2012: 189).

Academics become entrapped in a regime of performativity focused on the production of public and marketed self. The newsletters of various universities (2017-2019) indicate this. There, subjects display their performances and merits, which reinforce the managerial positions by promoting them internally to the students as well as internationally through their results as deriving from the good management. Having to report levels of academic life, subjects are caught in a new form of management, that of subjects' personality. Furthermore, by rapport to meritocracy and by accepting the management of personality, academics enable variations of auto-exploitation and surveillance mechanisms of their colleagues. Advancing towards the meritocratic tiers, academics force themselves to attain scripted merits and surveillance over the merit of others which has to be not equal with the personal one, but at least superior and by necessity, anchored into the well-designed managerial registers.

Illustrative is that many who gained superior ranks and overview the new criteria do not comply to them. Regardless of the outcome, the managers prevail; the results of others become theirs.

Meritocratic alliances

With fragile funding (by law, the whole education sector should receive six per cent of GDP, yet this has never happened in 30 years) and with increased demands, universities accepted the neoliberal change of HE. Under a market logic, universities have to compete to receive supplementary funds due to the classification into research universities, research and teaching universities, and teaching universities. The classification made universities inflate the rankings and design strategies to become primers certified by the nomination into the second group, which is seen as the most sustainable for their existence. Yet, the allocation of financial resources and the increase of prestige have been heavily hit by legislative interventions that have devised ways of "rationalizing costs, disciplining labour and instilling competition" (Gog, 2015: 28). Hence, the envisioned excellence through competition has suggested a disguised language of meritocracy that has created a tournament policy, permeated by the institutional meritocratic ranking system.

Another part concerns the creation of an elite network of universities. Five universities formed the University Network (Consorțiul Universitaria), a union striving to marshal meritocracy based on their heritage, popular perception and research outputs. Among many aspirations, this union strives towards keeping the flagship of RHE. Given a political decision to receive less budgeted places than other universities perceived as "local/regional" (UBB, 2018), the consortium took a meritocratic stance to separate itself from the rest. Considered the base of academic life in Romania, these universities stressed their role in international science and local development while other universities, notably those developed after 1990, were particularized by the union as having a "local/regional importance" and were contrasted through their adherence to political schemes. The document also lamented the lack of national awards received despite the "visibility/impact" traditional universities have. The point of this lamentation, somewhat justified, was the demarcation created against other units and the over-articulation of the historic legacy. This suggests that policies of extreme competition and the appeal to meritocracy dismantle the system and enhance the neoliberal path of RHE.

One final example of meritocratic alliances is the NGO Ad Astra association. Alternative to the contested national parametrization of merit, Ad Astra develops its own ranking of universities and offers symbolic prizes for researchers to highlight what they consider an impartial overview over Romanian science. With good critical insights on the development of RHE, the group, however, fails to see its own problems created by the focus on neoliberal criteria. As such, if one publishes in contested journals and is part of research grants based on subjective qualifications, that person can easily join the organization with little verification in this regard. Moreover, the association appears to have established a neoliberal deviation reinforcing meritocracy by requiring additional status reconfirmation through its own designated criteria. Even the titling "Asociația cercetătorilor români" (the Romanian Researchers Association)– conveys that only its members are the "genuine"/"Romanian" researchers.

Reflecting on meritocracy

Having framed three directions that support the establishment of the post-traditional meritocracy, this section expands onto the meritocracy discourse.

As pinpointed by the three directions developed within the neoliberal path and the adaptation of academic values to it, meritocracy has encroached merit. It has formed a veil that has deceived with rewards based on the interests of the market and constrains the scarcity of the system. It has enabled commodification while university has lost from its critical position constructed through intellectual endeavour and scrutiny beyond the market forces. This way, meritocracy has portrayed a powerful tool that not only justifies quality but has allotted punishments under discriminatory measures. Under this change, meritocracy has borrowed political and market language, distorting merit semantically and the circumstances that have created it—education where, despite flaws, had points of assessment.

Without a clear reasoning, meritocracy can be everything and this has opened ways to contradictions. It is a container of discourses and registers used to cover up inequalities and funding selection, while preaching about solving them and enhancing excellence. Likewise, confusion only enhances authority because no one, except the upper tier, may concoct what merit is and under what conditions one may receive it. If there are accepted international features, then those are altered to frame particular interests and advance policies that serve the institutional apparatus. A similar conclusion emerges from an analysis on internationalization of quality assurance: "government is seen as the main beneficiary of all evaluation procedures, followed perhaps by the university management to a lesser extent" (Geven *et al.*, 2015: 59).

Subsequent achievements are continuously reframed to serve the illusion of reaching the utopian merit tier. Merit is used to promote change and to recreate groups of interests who can support such transformations and maintain the power in a biased environment. The case becomes a ground for control, disguised within the discourse about meritocracy by which people can change and achieve success. As institutional and organizational management regulates merit, individuals are controlled and appropriated through actions that enable allegiance to an exclusive class centred on meritocracy of interests. Accordingly, meritocracy metamorphoses into a mechanism that enables the advancement of those who conform to a wider spectrum of accountable measures that advance political control. This is produced through the transformation of merit from individual selection to a collective selection that targets groups assumed to be meritocratic by trying to establish them as a distinct class of aspiration. Henceforth, meritocracy manages conditions that legitimize exclusion of undesirable subjects through ranks according to how individuals fit within the institutional design. Looking back, the reform has instilled meritocracy, yet it has also subjugated subjects and institutional components by (re)producing them into commodities.

The tactic is to promote modularity where authority can more easily separate the rankings and stratify the academic population. It is an instrument to exert authority through nudging procedures supervising the managerial and institutional directions. It is a silent violence over the academic community that allowed meritocracy to become an alienated instrument augmented through financial gains targeting academic communities and individuals. In regard to this, the power exerted through the discourse of meritocracy transforms individuals into political and economic tools. Equivalent tools are parts of a delegated surveillance where subjects challenge themselves and reject non-meritorious colleagues, avoiding the blame of sitting temporarily on the right side of ranking. We notice therefore a shift from the soft power of merit towards the hard power features of meritocracy, from dialogue to punitive and restrictive measures, from aspirations to the establishment of excellence groups and subservient communities based on bureaucratic and political interests. These enable a partition into good or bad, into worthy and burdensome, demanding discipline and punishment.

Building institutional authority requires responsive subjects to doctrinal identities/discourses by creating alliances that display and promote the benefits of institutional merit and its hard-acquired status. Meritorious subjects negotiate a regime of truth beyond the limits of self. This concurs with how the meritocrats consider morality to be on their side as they are entitled to reward themselves (Young, 2001), or to punish others. Preaching about merit delivers a strategy for power and control (gains popularity and maximizes income), but simultaneously creates a survival strategy (avoids criticism and academic isolation) against critique and failures. It stands in line to what Foucault (2007) broached, that governmentality revolves around political power and projection of interests. Now, meritocracy becomes both the strategy and technology employed to design and support the market.

Conclusions

This paper has explored RHE under the vector of meritocracy. It has linked to studies aiming to dismantle meritocracy (Liu, 2011; Littler, 2013) or its delusions (Purcell, 2007; Mijs, 2016). Following such studies that have criticized meritocracy, the paper has disclosed the aggression of meritocracy over layers of life in academia through increased control and techniques of removing the "pathological" out of the system. Specifically, it has attempted to elaborate on some effects that meritocracy has triggered, pursuing Dobbins's (2011) call for scrutiny in countries financially and ideologically dependent on the West.

The use of meritocracy in the RHE has become the vessel of institutional design in an attempt to move the system up in the rankings. Despite the early warnings of theoreticians who studied former communist countries, the RHE has restructured itself into generating outcomes by relying "on cognitive and moral resources which in their turn, however, are not to be created by administrative fiat" (Offe, 1996: 202). In this regard, the personal level has gained renewed insights through the interest on the stratification of lives because this enables meritocracy to twist morality and alter the university foundation, limiting the empowerment of communities and individuals under neoliberal forces. The research therefore advances a tragedy of the commons when HE is increasingly perceived to gravitate towards a unimodal existence—the neoliberal society advocating meritocracy.

Developed as a reflexive approach, the study also contributes to unveil meritocracy when the state develops into a platform for driving the HE system towards marketization. Disclosing this, we notice that Allen's (2011) prediction about the state governmentality has failed: it is higher and more brutal, just better disguised. At least this is the case in Romania and it would be interesting to be explored in the CEE region too. Another point argues that meritocracy reflects the state power in need of radical institutional design to enhance governmentality over its subjects and deliver them into the market. In numerous ways the state channels authority through tools and discourses that stratify academic life, and extends them into the everyday life. The RHE case thus supports the view that "the state has increasingly acquired for itself a new range of scales from which to act, as well as new tools and means of governing" (Robertson, 2012: 48), of which meritocracy stands at the forefront.

Anchored in neoliberal perspectives that have only pushed forward survivalist techniques, the HE has to distance itself and allow a reimagined normality. If the HE strives for quality and sustainability, the alternatives need collective thinking (Feldman and Sandoval, 2018). Old discourses that set the base of HE should be revisited alongside examining new avenues of struggle to improve the life of the community, society and the system. They should allow us to reclaim HE through critical reflection and activism (Morley, MacFarlane and Ablett, 2017). Although meritocracy in HE will hardly collapse, at least merit has to undertake a sustainable course, a more communitarian perspective filtered through collective practice.

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EDUCATION FOR (UN)SUSTAINABLE DEVELOPMENT: RECOGNIZING ANTHROPOCENTRISM IN ROMANIA'S SUSTAINABLE DEVELOPMENT STRATEGY

MARIA MARTELLI[1]

ABSTRACT. The environment is no longer a backdrop, but an agent pressing us to restructure our economic and political systems, down to our livelihoods. This research aims to make a critical overview of the Sustainable Development (SD) model. It looks at how market fundamentalism and anthropocentrism are driving forces in the shaping of its proposed form of education: education for sustainable development (ESD). This "new" educational paradigm aims to support the SD strategies that are globally implemented and "localized" at the nation-state level. The current SD model and the Agenda 2030 operate within a specific framework of the nature/culture divide, one that reiterates human domination. As such, this research aims to analyse the educational values within the idea of sustainable development – one that wishes to "reorient" society but instead ends up emphasizing it in its anthropocentric form. It does so by close reading and analysis of the UNECE Strategy for Education for Sustainable Development and Romania's National Strategies for Sustainable Development, 2008 and 2018. Concluding, it might very well be the case that restructuring schooling – and governing - to bring it up to the realities of climate change requires rethinking our fundamental educational values and the nature/culture divide, as well as making nation-states less servient of markets and less growth-oriented.

Keywords: political ecology of education, education for sustainable development, anthropocentrism, Eurocene

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Education and its environments: the global and the marginal[2]

We are the environments of others.
(Sabrina Scott, 2019)

Education changes slowly, but not as slow as a geological epoch. When it comes to environmental education, we should hope change comes fast enough. The short history of environmental education has led us to sustainable development, the latest big endeavour of global agreements. In 1992, after the Earth Summit, UNESCO replaced its International Environmental Education Program (1975-1995) with a program entitled Educating for a Sustainable Future (UNESCO, 1997). Education for sustainable development (ESD) is meant to strengthen "the capacity of individuals, groups, communities, organizations and countries to make judgements and choices in favour of sustainable development" where sustainable development is meant "to meet the needs of the present generation without compromising the ability of future generations to meet their needs" (UNECE Strategy for Education for Sustainable Development, 2005). ESD comes as one of the latest aims at institutionalizing a "broader" kind of environmental education, which has previously been a scattered concept that got defined within the debates regarding the values it should instil and the practices it should adopt (Sauve, 2005).

The notion of environmental education steadily developed, although without keeping pace with carbon emissions. Nation-states differ in how they participate in producing climate change and in how they are affected by it. They also differ in their approach to environmental education. Globally, there have been attempts at making common plans. During its 57th meeting, in December 2002, the United Nations General Assembly proclaimed the decade 2005-2014 as the "UN Decade of Education for Sustainable Development". In 2005 in Vilnius, UNECE (United Nations Economic Commission for Europe) proposed the Strategy for Education for Sustainable Development. For The Paris Agreement (2015), nation-states signed an accord to mitigate global warming and limit the temperature increase to 1.5 °C. In 2015, Romania adopted the Agenda 2030 for Sustainable Development, and in 2016, at the Batumi conference, the UNECE Strategy for Education for Sustainable Development was deemed necessary for achieving the aims of Agenda 2030. This was the start of Romania's

[2] This article is based on the research I have done for my master thesis at Babeș-Bolyai University, Faculty of Sociology and Social Work, coordinated by Florin Faje. I want to thank him for the conversations we had and for often sparking my curiosity. His course on Globalization and Development was instrumental for this research, as well as his insights and his helpful feedback.

journey to seriously tackle environmental education – a start that begun in the context of global powers negotiations, international agreements, looming climate change and pressing biodiversity loss.

My article makes two major claims regarding ESD: its tendency to embrace market fundamentalism and its anthropocentrism. These are grounded in a close content analysis of official documents for its implementation, and particularly in the framework within which ESD operates: "sustainable development". This framework is taken as intrinsic to the perspective from which ESD is born and inseparable from it. The fundamental assumptions of sustainable development are both anthropocentric and growth-driven, as shown by close reading of their official strategy documents. Moreover, attention must also be paid to who is speaking for whom – to who has the power to define, implement and strategize sustainable development (Banerjee, 2003). In this sense, the analysis takes into account the power that some nation-states exert upon others, given the position of political marginality of Eastern Europe and thus, of Romania.

Education does not happen in an ideological vacuum, but rather in very specific geographical and historical contexts, within power structures of many kinds. Moreover, schooling is something we do with the future in mind. My aim is to contribute to the literature of the political ecology of education, to critical analysis of the sustainable development framework and to critiques of anthropocentrism by providing an overview of what education is being proposed for this uncertain and vulnerable present-future we have.

The Anthropocene, The Eurocene, and the many names of development

The new epoch of the Anthropocene has been acknowledged, albeit less so in schools, meaning that humans have affected the environment to such an extent so as to warrant the coining of a new geological categorization. While schools are slow-changing institutions, the urgency of the climate crisis (Carrington, 2019; Letters, 2019) confronts us with a lack of time to do things in the usual way. Our politics, economy, infrastructure, production, consumption, almost everything must be changed if we are to keep to a 2 degrees warming path.

This time of the "Anthropocene" has many names and carries many meanings (Bonneuil & Fressoz, 2017). Scholars have been re-naming it ever since it was first named, to criticize or draw attention to other environment-modifying forces besides "the anthropos" (Haraway et al., 2015). Words are not innocent, and naming tends to affect how we think and approach concepts. There is a strong case for the "Capitalocene" (Moore, 2016), arguing that naming it the "Anthropocene" is ahistorical and doesn't consider what has really contributed most to environmental and climate change, namely, capitalism. For the purpose of better understanding the context of education for sustainable development and its implementation internationally with the help of the UNECE, the use of the "Eurocene" (Grove, 2017) name might be of help. In a similar note to the Capitalocene, the Eurocene takes into consideration the fact that "Not all of 'us' have played an equal part in the making of either the anthropos or the Anthropocene". It emphasizes the fact that there is:

> … a vanguard among the European people that developed a distinctively mechanistic view of matter, an oppositional relationship to nature, and a successive series of economic systems bases indebted to geographical expansion. The resulting political orders then measured success by how much wealth could be generated in the exploitation of peoples and resources. (Grove, 2017)

The "Eurocene" draws attention to the nation-states and the peoples that have both defined and benefitted from a certain organization of the world, and thus it does a finer work of describing the context than the "Anthropocene". However, "the anthropos" is not to be forgotten as a useless category. On the contrary, it is a category that must be analysed as well, especially given the fact that it is used to define subjects worthy of political consideration – "humans". The sustainable development goals deal primarily with members of the human species and are written for their "sustainable development" first and foremost. Therefore, a definition of anthropocentrism is due, as a view that "considers the satisfaction of human interests as central" or, more clearly: "Anthropocentrism is the disadvantageous treatment or consideration of those who are not members (or who are not considered members) of the human species." (Horta, 2009)

There is an importance to be put on the naming of education for sustainable development, too. It is an education "for", "towards" something, a normative education. Its end-goal is "sustainable development", that is the sustainability of earth habitability as well as economic development - concepts that don't easily go together. In Romania, ESD translates as "educație pentru dezvoltare durabilă" - education for lasting development. "Durabil" as a word hints more to a temporal dimension, a future-projection, while "sustainable", beyond its history of use, seems to include the present as well, to argue for something that can be "sustained" now and later. In this translation, ESD's emphasis is clearly put on "development" rather than "sustainability". These word choices are to be brought up because they might impact understanding in unpredicted ways. For example, I have opted, following Hursh et al., for the use of the term "*market fundamentalism* over *neoliberalism* to reflect the neoliberal's faith in markets" (Hursh et al., 2015). This belief will become transparent when reading the documents.

Environmental Education after the Holocene

Given the transformations brought about by the Anthropocene/ Capitalocene/Eurocene, how should schools be transformed? Indeed, are schools, as institutionalized forms of education, capable of being remade or are they rather part of the problem? If we are to respond, mitigate and adapt to the climate crisis, schools are to be re-shaped as well, possibly much more radically then first envisioned. We are not in Kansas anymore, not in the Industrial Revolution, not in the Holocene. Past ontological and epistemological assumptions are up for debate, now that the social/natural became visible to be as muddied as ever (Latour, 2015: 51). As a species facing a crisis it has partly helped produce (Scranton, 2015; Dawson, 2016), we owe it to ourselves and every other non-human to acknowledge, understand and act quickly and responsibly. This is not to re-iterate the classic argument that "growth" is a species problem, or to assume any deterministic stance regarding the human species, but rather to recognize what might be the political implications of being part of this species in particular.

There are many ways to go about this. In what follows, I will argue for a renewed understanding of our species' place within the ecosystem, based on rethinking the man/nature duality and our economic system (Morton, 2019). The environment is not just a background for our decisions. It is present, making itself known with its planetary crisis: "...when you mention the environment, you bring it into the foreground. In other words, it stops being the environment. It stops being That Thing Over There that surrounds and sustains us" (Morton, 2009: 8). What can education do in this more-than-human world, in which non-humans and other forces are pushing back the Enlightenment dream of human control and infinite progress? "What happens with education if it acknowledges that the world does not need humans, and it is likely to thrive ignorant of human existence?" (Pedersen and Pini, 2016). Re-thinking inquiry itself, and our given epistemologies, is only the first step towards restructuring schooling.

In face of the lack of recognition of how politics shape the idea of "nature" and "ecology" and "education", a political ecology of education is called for. Such a perspective is proposed by Teresa Lloro-Bidart in her analysis of the K-12 Framework for Science Education in the United States. Lloro-Bidart argues that the framework itself reproduces conceptions regarding nature/society: first, it emphasizes a belief in technology and science as a way of solving environmental problems and second, it frames "nature as a resource to be managed" (Lloro-Bidart, 2015). As "part of the natural world", the framework considers students and citizens as benevolent consumers (Lloro-Bidart, 2015, pg. 138). This nature/ society division, nature as resource, and citizens as consumers are also part of the sustainable development worldview.

Critiques of Education for Sustainable Development

Sustainable development aims to solve the ecological crisis mostly by "making production ecologically sustainable" (Merchant, 2005: 283). Economist Lori Ann Thrupp (*apud* Merchant, 2005) sees it as split into two main camps: a northern, upper-class, scientific approach that is protectionist, aims for population control and technological innovation; and an opposing faction, composed of "grassroots groups, indigenous peoples' movements, anti-establishment greens, urban minority groups, and a few academics, all of whom stress social justice in land, health, education, and quality of life" (Merchant, 2005: 286). We can see that ESD can be used and repurposed in a multitude of ways, both at the paper-policy level and implementation level. However, ESD has, most probably, failed to live up to its own standards. As Huckle and Wals (2015) argue, that is partly because it was too idealistic and partly because it censored more radical critical ideas. They mount an analysis of mainstream ESD documents such as the Earth Charter aiming to show how ESD has been (1) enveloped by neoliberal discourse and (2) policy-driven, without real implementation plans:

> Characterised by definitional haziness, a tendency to blur rather than lay bare inconsistencies and incompatibilities, and a cosy, but ill-considered association with the globalization agenda, the field has allowed the neoliberal marketplace worldview into the circle so the mainstream ESD tacitly embraces economic growth and an instrumentalist and managerial view of nature that goes hand in glove with an emphasis of the technical and tangible, rather than the axiological and intangible (Selby and Kagawa 2010: 37, *apud* Huckle and Wals, 2015).

Hursh, Henderson & Greenwood (2015) show that environmental education (EE) had long been influenced by neoliberal ideology. First, they underline that neoliberalism is a political project, not simply an economic one.

Second, they claim that its typical policies are shown to undermine climate solutions as they "promote re-regulating society to privilege market transactions". This leads to a restricted curriculum with a specific view that favours market fundamentalism. In such a system "environmental issues and crises are turned into opportunities for entrepreneurialism and technological innovation, rather than a systematic political and cultural rethinking and reworking of our relationships with the environment" (Hursh et al., 2015). It is not all bleak, however. Even in such situations, not everything is determined from top to bottom, as even the often-encouraged individual green consumption can further stimulate political activism toward environmental issues (Willis and Schor, 2012 *apud* Hursh et al. 2015).

Kopnina (2012) provides a brief overview of the relationship between EE and ESD, showing how the two are intertwined and sometimes competing. Her main concern is that ESD "presents a radical change of focus from prioritizing environmental protection towards mostly social issues, which may or may not be related to environment" (Kopnina, 2012: 701). Moral obligation towards other species is often forgotten or put aside, while ESD's strong points are human-oriented. There is a large debate concerning whether or not education should or should not be for/towards something, and in the case in which it should, this "something" is to be discussion, pluralism, self-determination - or rather something else (Jickling, 1992; Öhman, 2006). Kopnina writes that even these multiple perspectives might be less democratic when realizing (1) what Wals and Huckle also mention, that is, the unequal power of governments and corporations in the global community and (2) that the voices of non-humans are under-represented, despite being extremely important in the crisis at hand, and even under the threat of extinction.

In a long line of environmental positions that stream from a non-anthropocentric viewpoint, I agree with Kopnina's critiques. Without arguing towards diminishing the democratic pool, but rather exactly to keep space open for yet unheard voices, I believe that education should truly dedicate itself to thinking and acting critically of the society it is born in. However, allowing continuous debate regarding whether or not we should have an education that argues for environmental and climate justice is not a radical position, but possibly a dangerous one. It might be, indeed, robbing us of the time in which we could still do something regarding both human and non-human earth habitability.

Sustainable Development Strategies: political ecology at the margins of Europe

An understanding of ESD should rest on an analysis of the framework under which it is written about and implemented: sustainable development strategies. I use the qualitative method of content analysis to look at the strategies regarding the implementation of education for sustainable development in Romania. I start with official statements such as the 2018 Voluntary National Review, Romania's National Sustainable Development Strategy 2013-

2020-2030 (from 2008) and The Strategy for Sustainable Development Romania 2030 (from 2018) and continue with the UNECE Strategy for Education for Sustainable Development and its accompanying documents, such as the report for implementation in the 2017-2019 phase.

In the 2018 Voluntary National Review, Luminita Ghita mentions that Romania has had such a strategy dating back to 1999, under the motto “Doing more with less”. After EU accession in 2007, a new strategy was devised, based on European sustainable development goals and with an agenda for 2020 and 2030. The newest strategy dates back to 2018 and is written in accordance with the 17 global SDGs. Here I will devote attention to the last two strategies to underline their inclination towards market fundamentalism and anthropocentrism.

The national sustainable development strategy (SDS) of 2008 is a prime example of situating an Eastern European country in relation to Western Europe. Romania’s own goals are all traced in comparison with the European Union’s, a clear sign of its attempts to try to mitigate its “deficiencies” and “underdevelopment”. This is unsurprising, as:

> The concept of development did not exist in its current connotation until the late 1940s, when “economic development” became associated with the process to pave the way for the replication in “underdeveloped areas” of the conditions characterizing industrialized nations (broadly, agricultural technification, urbanization, industrialization, and the adoption of modern values). (Escobar, 2015)

Sustainable development is claimed to be an “integrated policy” in which “environmental protection and long-term economic development are considered to be complementary and interdependent” (National SDS, 2008: 10). While defining something as complex as SD in one sentence is, of course, difficult, compressing environmental issues into “protection” and considering it “complementary” with economic development shows how the two relate ideologically: the aim is to keep the environment as healthy as possible for the greatest economic growth possible. The feasibility of this aim is clearly put to the test by the latest IPBES (2019) reports on climate and biodiversity. Were we not to question this, it would still be problematic to think of them in such a relation: one that supposes that the environment is here for (some members of) the human species to create economic development. This is more obviously stated later in the strategy, by continuously referring to nature as “capital”, “resource”, “service”. The financialization of nature is problematic as a cultural practice, negating certain views in favour of others (Sullivan, 2009), as well as a sustainability practice, as profit for some is not livability for most.

When we look at the four key objectives (National SDS, 2008: 12), we encounter both "environmental protection through measures that make it possible to decouple economic growth from negative environmental impacts" and the promotion of SD through the world. This is scarcely possible when looking at the ways through which the decoupling of economic growth from environmental impacts is often achieved: by increasing the service industry and other low-carbon industries in detriment of more pollutant industries – which globally tend to be pushed back and externalized in the new "margins". The sustainable development paradigm operates by defining what "sustainable development" is based on the view of global powers, and implementing it in "Third World" or otherwise deemed "underdeveloped" places, without critically inquiring how these separations were made and for whose gain (Banerjee, 2003).

Romania, as a former margin or a "semiperiphery" (Boatcă, 2006), is constantly trying to gain ground by expressing the importance of its position in the EU and the resources it can bring. For example: "In terms of biodiversity Romania's accession brought into the European Union a valuable input of plant and animal species, some of them endemic, that had become extinct or rare in other parts of Europe" (National SDS, 2008: 23). This sentence shows how nature is, first, nationalized (owned by the nation to be used for its purposes) and secondly, politicized as a valuable resource that increases the country's position by Western standards. Accordingly, natural biodiversity enters the political sphere as a "resource" to advance the nation's agenda – in this case, becoming an economic and political force by European standards.

Much of the document affirms decisive belief in the mechanisms of the free market, as opposed to the difficult history of Romania's previous planned system, from which most environmental problems seem to have emerged. The document insists to "increase competitiveness" in all sectors of the economy, and "social inclusion" is to be promoted by means of a "flexible labour market, enhancing the relevance of the educational and professional training system for better employment, encouraging the emergence of entrepreneurial culture" (National SDS, 2008: 17). This flexible labour market, however, ends up taking a form that is advantageous to employers and detrimental to employees, making vulnerable those who provide "atypical" work – such as day-work, part-time, self-employed, etc. (Guga, 2016). On the contrary to helping with social inclusion, it does exactly the opposite.

Conceptually, the importance of getting "gradually closer to the average performance of the other EU countries" is continuously stressed. This is the underlying strife, often blaming Romania's historic development and comparatively praising market mechanisms:

> The main factors that have induced changes in the ecological composition and structure (and therefore in the carrying and bio-productive capacity of Romania's natural capital) in the past few decades can be traced back to the strategic objectives of socio-economic development and the means for their implementation over 1960-1989. Those policies caused imbalances and discontinuities that were corrected only in part under the spontaneous impact of market mechanisms in the period between 1990 and 2007. (National SDS, 2008:24)

The document situates Romania as an Eastern European, post-socialist country wishing to define itself according to Western European standards and to achieve them. "Market mechanisms" are, by contrast, revered, as just by their appearance imbalances are "corrected" – there seems to be no additional analysis or explanation needed. The strategy's belief in market fundamentalism is hard to deny. Romania is not a special case in this, as adhering to the "self-regulating global market" is "for Eastern European societies, ... being once again defined as "catching up" with the West" (Boatcă, 2006). The legacy of communism is shunned together with other forms of government subsidies:

> ...a large number of loss-making enterprises were kept alive through government interventions, which sheltered them from the rigours of market discipline and prevented them from adjusting to an increasingly competitive business environment. (National SDS, 2008:24)

Regarding education for sustainable development, the document mentions that the "entire educational and training system will internalize the principles and objectives of sustainable development" (National SDS, 2008: 82), affirming once again how it aims to be a broad, system-wide, normative approach to direct the student's view of society. These skills and knowledge will be integrated "laterally in all syllabuses", integrating them in each discipline, while aiming to transcend the boundaries of "formal, informal and non-formal". It is stressed that ESD must not be limited to an environmental perspective but be an inclusive concept that connects the environment, the social and the economic.

This approach, as previously noted (Kopnina, 2012), might end up being "a turn away from the environment", as in practice any human right, citizenship education can be catalogued as ESD. The vast area that ESD covers makes it difficult to conceptualize and can easily become useless as a category of understanding educational practice. It is easy to write about it in policies and seems to please everyone: a civil society concerned with sustainability and social injustice and a corporate sector preoccupied with economic profitability.

However, it does not clarify what is to be done, taught or learned. Its broadness can be used as demagoguery, but it could also be used by activists, teachers, and students to pursue more localized, justice-driven, and even radical education. In that sense, ESD is a double-edged sword for maintaining political power and the economic status quo.

Sustainable Development: a strategy for human and capital growth

The newest strategy for Sustainable Development (2018) has a more independent outlook, seemingly having internalized the sustainable development goals. Sustainable development aims to "satisfy the needs of the current generation without compromising future generations" and clarifies that "no one will be left behind" (National SDS, 2018: 13). Despite such broad claims, it seems that the generations it speaks about are solely generations of the human species. Even though the strategy contains two goals on conservation of "marine" (Goal 14) and "terrestrial" life (Goal 15), many individual members of other species will, indeed, be left behind or directly consumed. These other species are conceptualized as "resources", and must not be driven to extinction based on the fact that they benefit human use and capital growth. In this sense, from the very beginning, the strategy shows its stance as anthropocentric. To be precise, its strategy is a form of anthropocentric speciesism, where speciesism is "discrimination against those who are not classified as belonging to one or more particular species" (Horta, 2010).

The 2018 SDS acknowledges that in the last ten years, Romania's SD aims were written so as to partake in EU policies. In 2018 they are written in relation to the 2015 United Nations Summit for Sustainable Development, and in light of the resolution adopted by the General Assembly, specifically, The Agenda 2030 for Sustainable Development. The new discourse is much more focused on long-term economic growth along with citizen growth as human capital. Citizens are a resource to be invested in, their resilience is something to be trained and a culture of entrepreneurship can create a space in which they are to attain their material and psychological goals (National SDS, 2018: 17). From this very beginning, it is clear that market fundamentalism is not forgotten, although the historical past and the country's position as post-socialist is not mentioned anymore. Even trust is marketized and written about in terms of "social capital" as a way of "unlocking citizen's potential for self-realization" and sustainable development of their communities (National SDS, 2018: 18). The citizen is a focus of investment of resources for profitability much more than the community itself, for the SDS's underlying theory seems to be one of individualism. Despite this, "community" is a core aspect of SDS, constantly mentioned although not directly supported. Protecting the environment is seen as an "opportunity" for citizens to "unite in with a noble purpose" and it is everyone's responsibility because of the "human-environment" relationship (National SDS, 2018: 18). Clearly, environmental problems are seen as important because they impact human livability, but they are also instrumentalized as an opportunity for human advancement and community-making. Not only is nature seen as for-humans, but also as a space whose protection requires human ingenuity and thus gives back enrichment. In this sense, the image of an educational puzzle is of aid: environmental problems as human-made for human purposes of self-flourishing. A circular logic is used in this paragraph, as a safe natural environment is said to be achieved by having already cultivated a sense of community (instrumental, as well, in achieving personal potential).

The aesthetics of the new strategy is different, friendlier, with graphs and colours, as if imagining a broader readership, and thus the involvement of civil society as promised. As written in relation to the global agenda, it refers directly to the 17 goals. Under goal 4 (Quality Education), ESD is mentioned as a key "instrument towards realizing SDG" and described as an underlying educational paradigm whose goals are "to help individuals reflect upon their own actions, taking into account their current and future impacts, social, cultural, economic and environmental" (National SDS, 2018: 38). Unsurprisingly, environmental is stylistically last. The 2020 goals aim at having curricula based on competences (achieved in legislation), but also, the "promotion of entrepreneurial culture" (keeping constant with its belief in market mechanisms) and the support of extracurricular activities that promote education for "health, civic education, artistic, scientific, ecologic education and through sports" (National SDS, 2018: 40). This, as a strategy, denotes that certain topics remain outside of the realm of traditional schooling (health, art, ecology), while others are pushed within (entrepreneurship). What is stressed as an aim for 2020 is schooling's ongoing connection with market actors, by encouraging knowledge-making for the necessities of the local business sector. While there is some attention paid to improving the quality of education and to addressing inequalities, little is mentioned in regards to environmental concerns. For its 2030 goals, the strategy aims to have students knowledgeable enough to "promote sustainable development", including "a sustainable lifestyle, human rights, gender equality, a culture of peace and nonviolence, appreciation of cultural diversity and of culture's contribution to sustainable development" (National SDS, 2018: 41). All of these sound good as buzzwords, but both the conceptualization of such aims and the implementation is more complicated.

For one, it is obvious that students are to internalize the normative truths of EDS. That means not only having them agree with a growth-based, market fundamentalist, anthropocentric worldview but also to become active agents in its implementation. Students in institutionalized education are always located within a society and taught according to a society's norms and needs. While dissent might appear (from both students and teachers), the overall reproduction of a specific culture and power structure seems to be the aim.

In the 2018 Voluntary National Review, the Coordinator of the Department for Sustainable Development, Laszlo Borbely, says that "Our biggest challenge today is to live sustainable and to make sure that nobody is left behind" (quoted as written). Sustainable development is seen as a way of life that each of us, individually, should pursue. In this way, the accent is put on each individual's actions, and especially each individual's consumption. Thus, it is not rare that the proponents of such strategies focus on individuals and less so on communities, and on consumption and less so on production. Romania's position as a country is not forgotten, however, now, it is a "strategic bio-geographical position", at "the crossroads", "a bridge between ecological regions", with "the ambition to become a regional hub for sustainable development". The country's past is not mentioned anymore, only its present and its future. Environmental "riches" become part of the country's pride in the face of global powers. "Nature" has entered political discourse as a "resource" that can re-make the image of the country as strategically and geopolitically valuable.

The two sustainable development strategies (2008 and 2018) have minor differences, but broadly, they envision a future that is for-humans, for their growth, first and foremost individually, but also community-wise, nation-wise and of course, economically. This future they are preparing for seems ignorant to the implications of the climate crisis. Climate change action is only one of the seventeen goals, namely, and ironically, the 13th. The kind of education the SD strategies are promising seems very much like the strategies themselves: too optimistic, market fundamentalist, and anthropocentric.

ESD and its citizens at the centre of the scorched Earth

"The consumer is still the king: nature is not so much understood as consumed."
(Subhabrata Bobby Banerjee, 2003)

In UNECE's strategy (2005), ESD is seen as an education in a constant process of redefinition, one that must be localized, that is lifelong, and that aims to be ethical and tackle equity and solidarity issues. Community involvement and partnership making with multiple stakeholders (government, NGOs, citizens, private and non-private sector, mass media, etc.) is stressed and of great importance in ESD decisions. One of its principles is to promote decision making for the protection of the environment (III, point 27, UNECE Strategy for ESD 2005).

ESD's economistic, resource-oriented view, as well as the division it internally makes between human and nature transpires from parts of the strategy, although it aims to be otherwise. For one, it is said that ESD finally takes into account human action, society and economy in regards to nature, critiquing previous EE as just about environmental concerns. However, this is a dishonest view of other strands of EE, which have also included social concerns (Sauve, 2005) while being mindful of their relationship to the environment. In this sense, ESD can be accused of boasting too much and doing too little.

ESD is greatly concerned with human rights and human living - in that sense, it is anthropocentric. Some documents try to address and redress this problem, such as "The Future We Want" (United Nations Conference on Sustainable Development 2012), but most seem completely unaware or uninterested in it. For example, point 33(d) (UNECE, 2005) argues that ESD should provide insight into problems by using a life-cycle approach that focuses on economic implications as well, "addressing both the natural environment and that modified by humans" - however, in the Anthropocene it becomes harder, if not impossible, to draw a line between "natural environment" and that "modified by humans". Moreover, such a delimitation is proof of how nature is kept over-there, while humans are kept separately, over-here, as if not part of it.

Point 34 argues that governments should be "supportive of non-formal and informal learning because informed citizens and knowledgeable consumers are essential in enacting sustainability" - people are seen as both citizens and consumers, and it is through citizen practice and consumer practice that sustainability is enacted. It appears then that one's citizenship (however that may be defined) and one's status as an economic agent is what drives ESD's points. First, this denies agency to those that are not citizens, such as (1) those humans that are refugees, migrants, homeless or too poor or otherwise disenfranchised, as well as (2) to nonhumans who are not even at all considered as relevant agents, although they are the first to suffer from biodiversity loss and actions taken to sustain anthropocentric economic growth. Second, this focus on the citizen/ consumer obscures other options for sustainability (Banerjee, 2003). People might oppose viewing sustainability as simply a consumer practice, for example by wishing to create spaces outside of economic consumption (such as those of mutual exchange, urban community gardens, free zones). Of course, ESD is aimed at redressing economic inequality and social injustice, but its enactors seem to be still, mostly, the privileged ones. This is further seen in point 37 on mass-media, that should be mobilized to pass key SD messages because it is "a powerful force guiding consumer choice and lifestyles". In many cases, ESD seems to be just another instance of the individualistic mantra of "voting with our wallets".

Making Education for Sustainable Development happen

In terms of practice, ESD is different than "traditional schooling" (Stevenson, 2007) because it demands teachers to be a team with the students and not transmitters of information. ESD is meant to be interdisciplinary, problem-solving and process-oriented, thus it is based in the here and now, with a particularly practical approach. It is a whole-institution orientation, recommending that the entire school community (teachers, students, parents, managers) orient their teaching according to ESD principles. There is much debate on whether such a reorientation is even possible, as it requires teachers to be able (and willing) to "challenge the dominant conception, organisation and transmission of knowledge" (Stevenson, 2007). Moreover, it requires an enormous amount of work and resources to be dedicated to this restructuring.

From an implementation point of view, countries are asked to make a national plan and find or create core bodies to put it into practice. As of the 2017–2019 official report, in Romania, the Governmental institutions involved are Ministry of National Education (MoNE), Ministry of Environment, Ministry of Research and Innovation and the newly created Department for Sustainable Development (founded by Government Decision 313/2017). Additionally, three NGOs are involved: European Network for the Promotion of a Responsible Economy for the 21st Century (the REPER 21 Association), The Foundation for the Development of the Civil Society (FDCS) and The New Horizons Foundation. There are also a few universities involved and no businesses. MoNE is set as the central decision-making body, with country school inspectorates supervising implementation. ESD is cross-referenced in the formal curriculum of pre-university education in Romania, and the National Strategy for Sustainable Development 2030 aims to achieve ESD targets. The part that is in the making is the bulk of it: Reper21's program, ONG21, which gathers NGOs under one network to draft the ESD national policy proposal by June 2019. Attention is given to informal education as well, pointing out the School in a different way (Școala Altfel) programme - one week per year, consisting of various educational activities, national contests and after-school programmes. Public awareness is mobilized, for example, through the World Environment Day 2018 (Beat plastic pollution), with selected achievements from various schools.

Reading through the report, it becomes clear that Romania is particularly late in ESD implementation, as by 2015 it should have been in stage III of its implementation, but it is only now drafting new policies and what it claims to have done is what already had been included in the national curriculums in 2017. The answer to this lateness is to be searched for, however, the difficulty of getting ESD through the institutionalized educational system isn't hard to notice. One can take ESD competences and try to think them through typical school practice: Learning to know; Learning to do, Learning to live together; Learning to be (Learning for the Future: Competences in education for Sustainable Development, 2011). How may these be taught in the same institution of memorization, learning to the test and constant demand for student performance (Martelli, 2018)?

The difficulties are many, which does not mean that the opportunities are few. First, the difficulty of implementing the practice of ESD, which requires challenging the way the transmission of knowledge is done, is clear. Second, the underfunding of education is a constant problem (European Comission, 2019), and it must be addressed systematically, otherwise, there is little hope for large-system change. Third, although it is anthropocentric and market fundamentalist, ESD contains claims of cultural diversity that are valuable, but vaguely implemented – for example, in Romanian education, there is a lack of attention to Romani history and language (Furtună, 2019; Vasile et. al, 2020). Fourth, its championing of ideas of gender equality is as necessary as they might be met with resistance (Gheorghe, 2019; Grünberg, 2019). Fifth, the not-yet successful implementation of ESD means, for a state such as Romania, its difficulty in "catching-up" with the West and its standards. Sixth, it remains to be seen how and if ESD practices are capable of addressing the already existing systemic inequalities in access to quality education (Vasile et. al, 2020).

The opportunities to be taken from such a programme are not to be entirely dismissed, however. Re-structuring education to be less about memorizing and more about learning to be/know/do is valuable work, that can be further refined. Moreover, as previously claimed, the broadness of ESD is not always a weakness, but it could be instrumentalized by teachers, students and others to propose a more just and critical education within this same framework. However, this is not to say that all the hope should be put on the shoulders of marginal cases and lucky communities – only to acknowledge their agency. What is to be made is a call for a fundamental re-conceptualization of what education can, should, or might have to be in the age of the Anthropocene/Capitalocene/ Eurocene. Such a call cannot be made without seriously reconsidering the issues with the human/natural divide, as well as with the economic and material structures that dictate definitions and strategies.

Further research questions

This article deals mainly with the official documents of the sustainable development strategies and how they deeply influence what education for sustainable development is. In this sense, it is restricted to an analysis of policies, definitions, strategies, words and language, and much remains to be said about what has been done. How does ESD look within or outside the classroom is a different question. Furthermore, much remains to be said about how these documents are made and decided upon – as there might be a difference between who can speak and who ends up speaking, ultimately. In this sense, this article stands to make a few necessary claims regarding two theoretical foundations of ESD and SD, and much remains to be researched about how they are put into action.

Conclusions

Education for sustainable development is not and cannot be a replacement for environmental education. It is, more likely, an education made specifically to respond to a context of the environmental and climate crisis, without needing to radically change the system that originated the crisis. In this sense, ESD is exactly following the aims of "sustainable development" unquestioningly. It is oriented towards promoting human rights, of course, but it gives weight only marginally to the environment, which is almost an afterthought. It is an education that accounts for current issues such as infrastructures and climate change on the environment side, and poverty reduction, gender equality on the human side (as ESD itself would phrase sides as if they are separate). While it tackles world problems in a way that is transformative for how education is done in many of Romania's schools today, it is not transformative enough to look at class issues or recognize the need of justice for nonhumans. Furthermore, it leads attention away from an ecological view towards a human-centred view, therefore re-enacting what has brought us here in the first place. ESD is deeply anthropocentric and reifies a view of the world as for-humans, for human knowledge, protection, admiration, learning, growth, use. It is done in a global context of sustainable development strategies that, despite their declared intentions to reorient society towards a "sustainable" one, are still market-fundamentalist and go hand in hand with the current capitalist system.

A particular historical and economic arrangement of the human species has become the leading cause of the sixth mass extinction and climate change (Dawson, 2016; Grove, 2017), and as such, a global, political, species-conscious approach is necessary. It might be preferable, as the old saying goes, to leave much of the economistic, anthropocentric thinking that caused this mess behind, in hope of going forward. Education for sustainable development doesn't stand up to the task. Another education is possible: this might mean leaving spaces up for questioning, listening to the voices of nonhumans, having a community inspired, climate-conscious curriculum, and taking action with all of the learning community to foster resilience and solidarity with humans and nonhumans.

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THE REBELLIOUS SOCIAL NETWORK REACTION TO COVID-19

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ABSTRACT. Gathering social media content and analysing the heavy and unstructured text coming from posts, comments and reactions can come as a powerful tool in understanding how people react to the information they receive. In this article we present the results from a social media analysis of 10771 headlines, with their subsequent text bodies and comments posted in a subreddit destined for Romanians during the state of emergency declared in Romania, from March 16 to May 15, 2020. Our objective was to model the main topics debated by this targeted population of people that tend to use Reddit to discuss current issues and to identify the sentiment polarity towards these topics. As expected, Romanians are mostly concerned with their social condition in the context of the pandemic caused by CoVID-19, as our research has revealed a word frequency for the term "Coronavirus" prominently higher than any other preferred term. However, the analysis brings up a surprising turnaround as the overall sentiment of the text posted in this dataset is predominantly neutral with a higher frequency of positive posts compared to the negative ones. This was unforeseen by our initial expectations: a natural tendency to more negative posts than positive considering the context of the chosen study period. Moreover, when compared to the time series of the CoVID-19 infections and caused deaths in Romania, spikes of extremely high or low mean sentiment scores per day can be correlated to the fluctuations of the declared cases. Not only does this bring us closer to understanding the social impact of CoVID-19 in the current context, but the outcome of this analysis can be easily extrapolated for further investigations upon other social networking tools or for more in-depth analysis on our studied corpus.

Keywords: social media analysis, sentiment polarity, topic modelling, CoVID-19, state of emergency

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Introduction

Public opinion is a key point in analysing how the information is spread and impacts people's lives. We refer to the public opinion as it is defined by Krippendorff (2005), in which opinion implies an independent, unpredictable and cognitively autonomous exercise of one's mind, while public, a noun coming from Latin and meaning "people", refers to a collective and in our case, a collective which exercises their ability of having opinions in the public sphere.

With the growing popularity of social networking, the heavy content of posts, reactions and comments allows us to analyse what people are most concerned of and their reaction to such concerns (Fersini, 2017). This, in turn, brings us closer to understanding how is it that the society expresses concern about an issue, in our case, the perception over a period of time about CoVID-19 social, medical, economic, and political implications. The way we studied public opinion via social networking is an expression of favouring positive feelings or indulging negative feelings in people's lives.

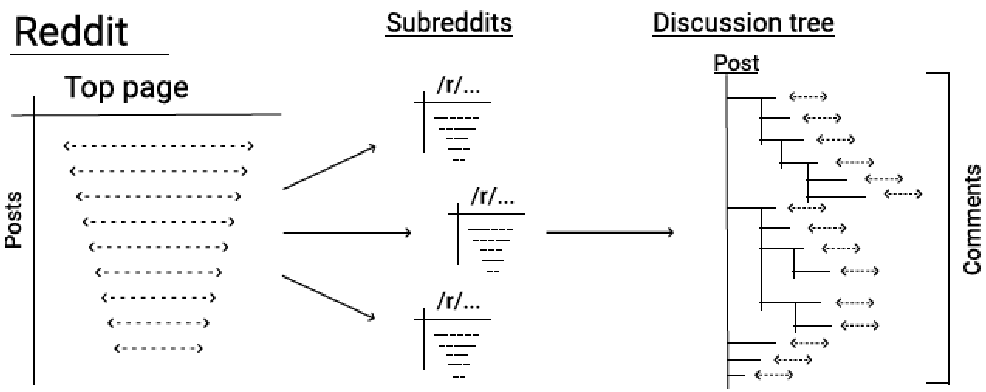
In this study, we have analysed almost 7.5 million words from Reddit posts to determine the polarity and the inclination towards a popular subject. CoVID-19 was the aimed subject taken into consideration due to the economic, political, and social implications that have boomed during the last months (Swasey, Winter, & Sheyman, 2020). We have not, however, targeted only the posts who were related to this subject, but rather modelled the topic out of the text corpus to see whether this situation was discussed via social media. On the 16th March 2020, the president of Romania announced that the country is under a 'state of emergency', implying a series of restrictions and new rules that threatened to change the lives of many citizens. On the 15th May 2020, the country switched from state of emergency to 'state of alert' with fewer restrictions.

In this context, our study focuses exclusively on the Reddit (Reddit, 2019) text posted in a Romanian subreddit during this period and aims to the understanding of how these changes and the way they were communicated have affected Romania's young to middle-aged population. Reddit is a social networking tool intensively used by young adults and an increasing audience consisting of young and middle-aged people. It is a platform that combines web content, forums, and social news, organized in subreddits. Submissions get upvoted by other users, which makes it easy to identify the popularity of the content posted by a user (Mediakix, 2018). Discussion trees (Figure 1), as described by Alexey N. Medvedev, Renaud Lambiotte and Delvenne Jean-Charles (Medvedev, Lambiotte, & Delvenne, 2018) are a form of organizing the posts and comments people submit and contours the life of a community.

This aspect further implies important public opinion factors: liking, supporting, having attitude, and expressing one's beliefs upon something, which are debated on this social media platform in a dynamic, forum-like exchange of opinions. Reddit is by itself a social intrument of acting in one's beliefs since the posts get upvoted and engage people into giving feedback, hence they form an act of drawing attention (Medvedev, Lambiotte, & Delvenne, 2018). This empowered us in choosing Reddit as a platform of public opinion amongst so many others available online.

Moreover, Reddit users are pseudonymous, and there is more likely for them to express without constraints because they use Reddit services without displaying their real name. What might come as a surprise is that the platform collects personal data such as: email and IP address, private conversations, reactions, and posts. However, the information targeted in this article is the text corpus coming from the posts and their comments, and no user-related data has been analysed (Reddit, 2020). Once again, we have chosen Reddit for our study because it is one of the largest web services, it has a dominant database with more than 300 million users, and in the last 6 months they gathered over 1.5 billion visits (SimilarWeb, 2020). The platform comes with an API destined for the fast and easy collection of titles, bodies and comments for defined periods of time (Reddit, 2018).

Figure 1. Schema of the structure of the Reddit platform: top page organized in subreddits and discussion trees



Source: Medvedev, Lambiotte, & Delvenne (2018).

This article first covers an overview of the existing literature discussing the matter of how people are generally reacting during a social crisis, which are the feelings they tend to share and how they are adapting to an unusual situation that is threatening to alter most spheres of the society. A particular focus is shaped around the times of pandemics, and around what happens when people tend to seek information and debate around the disease causing the pandemics in the first place. The main research questions are stated in this context followed by a section which targets the methodology of the analysis that drives to answering them. The methodology touches all stages of the analysis, illustrating how the results were driven and which were the limitations of the open source technologies we have used. This in turn is followed by an interpretation of the results gathered at all stages of the analysis: data preprocessing, word frequency analysis, sentiment evolution in time and topic modelling. These interpretations are wrapped together in the discussion section where our findings are theorized along the sociological findings together with the practical application of the text mining techniques applied on large sets of unstructured datasets coming from social media debates. In the last section, the conclusions of the study are drawn. Here we also harvest some of the future research directions instigated by our study.

Shared feelings during a social crisis

During a pandemic, it is normally expected that negative feelings such as uncertainty, fear, anxiety, or worry would arise among societies (Dingwall, Hoffman, & Staniland, 2013). In this way stress levels increase in individuals and expose more sensitive ones to more serious disorders (Shigemura, Ursano, Morganstein, Kurosawa, & Benedek, 2020). This could be explained by the fact that generally people have easy access to all shapes of information, including inaccurate and exaggerated news that circulates over the Internet and that intentionally or not increases the sense of fear and uncertainty (Ornell, Schuch, Sordi, & Kessler, 2020). Nonetheless, media plays an important role, as by spreading the news about the disease and its potential implications, it causes a sense of danger among the public, more than simply increasing its awareness. In this way, people normally perceive the problem in an alienated manner which differs from their own experience or knowledge. A serious effect can fall on “the sense of ‘trust’ that the society has in the face of mass problems”, meaning that in such conditions people are starting to doubt the governing organs of the country as well as the states’ official sources of information (Kasapoglu & Akbal, 2020). This in turn results in a weakening sense of security and hope for the future in the population of the country, ending up in a general negative feeling.

This causes the pandemics to turn from a natural problem to a social one as its effect is sensed in most of the spheres of the society: family, education, workplace and employment, public places, and open-air activities (Kasapoglu & Akbal, 2020). What causes this uncommon situation to be sensed as an instigator for fear and uncertainty is its effects on most social aspects in people's lives. Once the social distancing becomes mandatory, all activities that were done in groups have to be stopped (De Vos, 2020). This could either involve leisure activities or work or school related ones, all of which are part of our day to day lives. Once this significant part of our lives has to be readapted to the new reality we are facing, this triggers an entire chain of causalities to arise and to instigate uncertainty in the population. Not only does the disease itself cause an epidemiological impact, but also the fear of the implications of the disease is easily spread causing an impact in the social relations and consequently in their public discussions and debates.

Social media can be a powerful data source offering us a wide range of possibilities to discover previously unknown information about what people are discussing (Usai, Pironti, Mital, & Mejri, 2018). They can either be using it as means of expressing their opinion, or as a reaction to other people's opinion or simply to communicate with the others. Shaping this information using novel text mining techniques can help us to better understand the impact that a major event can have on the society (Ampofo, Collister, O'Loughlin, & Chadwick, 2015). Such major event is, in our case, the pandemic caused by CoVID-2019 and its implications on most sociological layers.

We should, however, be aware that this novel type of data comes in an unstructured format and in heavy quantities which require careful transformations to allow a fair interpretation of the information and the consequent creation of knowledge. The problem we are facing is the lack of consistent research in mining social data, therefore the full potential of the advances of text mining tools towards sociological studies has not yet been reached (Ristoski & Paulheim, 2016; Usai, Pironti, Mital, & Mejri, 2018; Gaspar, Pedro, Panagiotopoulos, & Seibt, 2016). What is more, the process of data construction itself yields a transparent delivery in a well-defined research framework (Mutzel, 2015).

Recent studies on social media data understanding how society reacts under the stress of a social crisis are given by Gaspar, Pedro, Panagiotopoulos, & Seibt (2016) and Dawn Breslin, Enggaard, Blok, Gårdhus, & Pedersen (2020). The latter employs an analysis of the same situation as the one studied in this article: the reaction to the pandemic and consequent lockdown caused by CoVID-2019. Both studies reveal that the studied countries have gone through real stressful times which has provoked a combination of negative feelings in their population. On the other hand, Zhong et al. (2020) are arguing that, in China, the crisis deployed by CoVID-2019 is perceived in an optimistic, hence positive way by the people who "have appropriate practices towards COVID-19" or simply, who are more knowledgeable about the virus.

In this context, our main concern is the following: how did the Romanians who are expected to be well informed react to the pandemic caused by CoVID-2019? We took the study case of the Reddit social media reaction during the lockdown as the lead dataset to be studied. Our expectations were to identify a special focus on the discussion around this virus and its implications in the social life of the individuals, shared among the social network platform studied. Around this topic, we have also expected a tendency towards panic or fear, hence proof of negative feelings towards the causalities of the pandemic. Using the results of this analysis, answers to the following questions were sought:

a) Is social media a means of expressing powerful feelings towards the context of a social crisis?

b) Is the general sentiment identified in the text from the social media during the most restrictive times during the pandemic revealing fear or more of a positive feeling, such as optimism?

Methodology

We have followed the widely used data analysis steps for Natural Language Processing for our research dataset, using Python (Python, 2014) as a data science tool for fast analytics and Tableau (Tableau, 2009) to display the results (Deepa, Manjunath, & Ravindra, 2019), (Subramanian, 2019). First, we have preprocessed our dataset in terms of text cleaning, translations, and lemmatization, and second, we have counted the frequencies of all words' occurrences from the posts and comments analysed. We have taken both Romanian and English translations into account. Last, we have computed the sentiment polarity score and compared the results with the official CoVID-19 infections and deaths recorded per day (Portal, 2020). All steps of our methodology are represented in a series of Jupyter Notebook files published in our GitHub repository (Cioban & Vîntoiu, 2020).

Data containing the text of the posted titles, text bodies, and their comments, together with the number of comments and scores for each post were extracted using Reddit's available endpoint for data collection (Reddit, 2018). In Table 1, the descriptive statistics of the explored dataset are shown. The main variables of the study are the Reddit-computed score of each posted headline, the number of subsequent comments for each post, the computed length of words for the posts and comments in both English and Romanian and the computed Vader (Hutto & Gilbert, VADER: A Parsimonious Rule-based Model for Sentiment Analysis of Social Media Text, 2014) score for each post translated in English. As seen from the descriptive statistics table, more text is concentrated in the comments than in the posts. This comes as expected as posts are generating a high number of comments, in this case leading to a maximum of 1098 comments for one single post. The top rated scores as per the Reddit scoring system (Reddit, 2019) seem to be getting close to 3000, whilst the least popular ones even get a score of zero points. As the mean of the number of words used in the comments is very high compared to the word length of posts, we have used the Romanian word frequencies from both the comments and corresponding posts to understand which are the terms preferred by Romanians over Reddit during the lockdown. In terms of the Vader polarity score, the mean seems to be close to zero, with a standard deviation of approximately 0.4 leading to spikes of positive and negative feelings identified among the posted headlines. We have extracted and analysed a total number of 10771 headlines and their subsequent 217815 comments available from the subreddit "Romania" (Reddit, 2019), during the state of emergency declared from March 16 to May 15, 2020. The analysed period contains 59 days, having computed a mean polarity score for each which was compared to the number of CoVID-19 infections and caused deaths (Table 2). We avoided using any specific tools to filter out the threads that were not discussing around the virus, to see if one of our main expectations was met: people discussing mostly around the implications of CoVID-19.

Table 1. Descriptive statistics of the titles, bodies, and comments in the Reddit dataset from the Romania subreddit retrieved between 16 March 2020 and 16 May 2020

	Reddit score	**Number of comments**	**Posts (Romanian) word length**	**Comments (Romanian) word length**	**Posts (English) word length**	**Posts (English) Vader polarity score**
mean	59.54	20.22	37.52	661.55	34.65	0.016
standard deviation	183.7	47.76	116.56	1830.01	129.09	0.4
minimum	0	0	0	0	0	-0.997
1st quartile	1	1	7	45	7	-0.077
2nd quartile	5	8	15	135	15	0
3rd quartile	40	23	27	586.5	27	0.226
maximum	2878	1098	2559	42389	7384	1

Source: personal computations based on the data from Reddit (2019).

Table 2. Descriptive statistics for the daily CoVID-19 registered cases and caused deaths between 16 March 2020 and 16 May 2020

	CoVID-19 cases	CoVID-19 caused deaths
count	59	59
mean	265.51	16.98
standard deviation	126.34	11.18
minimum	17	0
1st quartile	190	7
2nd quartile	278	19
3rd quartile	346.5	25
maximum	523	42

Source: personal computations based on the data from Portal (2020).

Considering the low availability of natural language processing support existent for the Romanian language, we have translated all bodies and titles' text to English using Yandex API (Yandex Technologies, 2019). This endpoint allows translations of up to 5 million words per day meaning that we were restricted to only translate the body and titles corpus, as the high volume of text in the comments was exceeding the allowed limit for text translation. The critical preprocessing required by any translation toolkit was to clean all text from special characters, emoticons, and URLs. Due to this requirement, an important aspect of the dataset was omitted: the reaction expressed via emoticons which is nowadays widely used in social media. Still, considering the forum-like expression of text typical to Reddit, text is usually preferred by users instead of emoticons as a means of transmitting reactions to other people's posts or comments (Medvedev, Lambiotte, & Delvenne, 2018).

All data was saved to a text corpus and analysed in terms of word frequency. We used the Bag of Words technique (Zhang, Jin, & Zhou, 2010). Therefore, we have constructed a dictionary consisting of the top 5000 words and used it for the word vectorization step to aid in visualizing the results and model the two main topics from the studied Reddit data. To model the word embeddings, we used Python's library scikit-learn, CountVectorizer (Borovikova, 2011).

To investigate the polarity of the posts, we have used the Vader rule-based lexicon (Hutto & Gilbert, VADER: A Parsimonious Rule-based Model for Sentiment Analysis of Social Media Text, 2014) to compute a compound sentiment score for each post, generically defined here as the titles joined with their corresponding body text. Vader was chosen for its fitness for analysing the sentiment across social media text (Pandey, 2018). A positive sentiment is considered to have a compound score of more than 0.05, while negative is less than -0.05. Everything in between is considered neutral. Hence, we have categorized our posts according to these threshold values. All lexical ratings can be found at (Hutto, vaderSentiment, 2020). All scores were analysed against the number of CoVID-19 cases and deaths declared per day in Romania (Portal, 2020) to count for any correlation that could bring an explanation for the daily fluctuations in sentiment scores.

To identify the two main topics of the corpus, we have used LDA (Latent Dirichlet Allocation) modelling from the Python Gensim library (Gensim, 2019). We applied the model on top of the corpus words present in the BOW created previously to make sure we are modelling only the most frequent 5000 words.

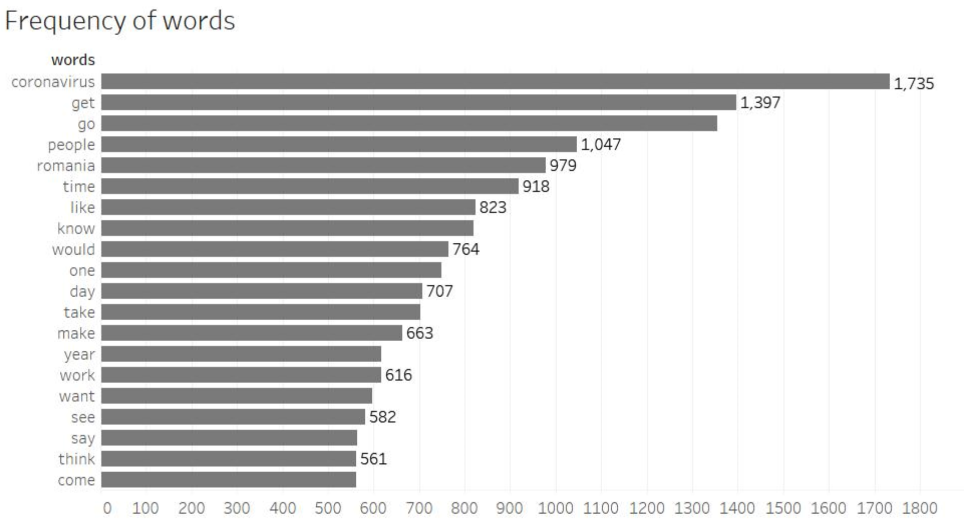
Analysis results and interpretations

The frequency analysis is displayed in the form of a top-50-words frequency bar chart computed using the Bag of Words for the top 5000 words used in our corpus as displayed in Figure 2. The most frequently used word in the studied subreddit is "coronavirus", hence people are intensively discussing the situation caused by CoVID-19 or, simply, people are bringing the new coronavirus often in their discussion on Reddit. This finding is aligned with our expectations from the beginning of the study. Along other frequent words we have identified "Romania" and "people" and simple verbs like "know", "get", "make" and "think". This suggests a common concern for the state of the population of the nation around the pandemic caused by this virus in Romania.

When analysing the number of words per day during the state of emergency (Figure 3), it was easily observed that the numbers were extremely high at the beginning of the period, especially in the first month, causing people to intensively discuss on Reddit. This is explained by a shared concern of the population of the Reddit users around the newly installed situation in the country and the novelty it brings amongst the social spheres affected. In general, the most prominent spikes correspond to important news related to the public declarations made about CoVID-19 in Romania. One such case is the official proclamation of the city of Suceava being under a restrictive quarantine after an explosion in the number of CoVID-19 infections (Ilie, 2020). This could be perceived as the fact that people were using high quantities of text to express themselves when important news was addressed to the population.

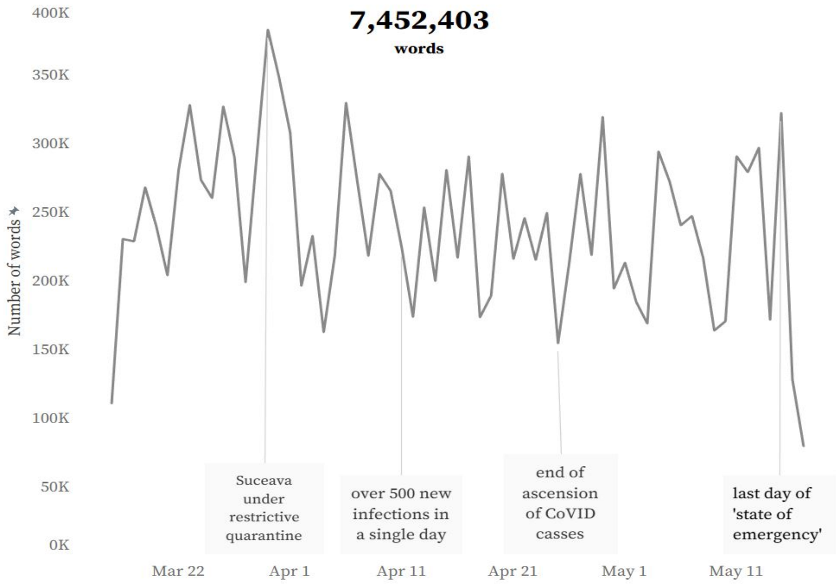
Overall, the compound sentiment scores vary from -0.998, representing the most negative feeling to 1 for the most positive, with a mean of 0.016, hence having a predominantly neutral sentiment across the Reddit posts analysed during the state of emergency in Romania. However, the frequency of posts per sentiment category (Figure 4) reveals a surprising twist from what we anticipated initially: the positive posts have a higher occurrence than the negative ones. This fact might imply that in general, people had a tendency for being more positive when expressing themselves via Reddit posts in Romania during the state of emergency, than they were negative. This in turn, could be interpreted as a generally optimistic attitude in favour of a pessimistic or fearful one, coinciding to what was discovered amongst people in China which are known to be more knowledgeable about the disease and its precautions. (Zhong, et al., 2020)

Figure 2. Frequency bar chart based on the BOW text representations for the 50 most frequent words in corpus – Reddit data from the Romania subreddit retrieved between 16 March 2020 and 16 May 2020



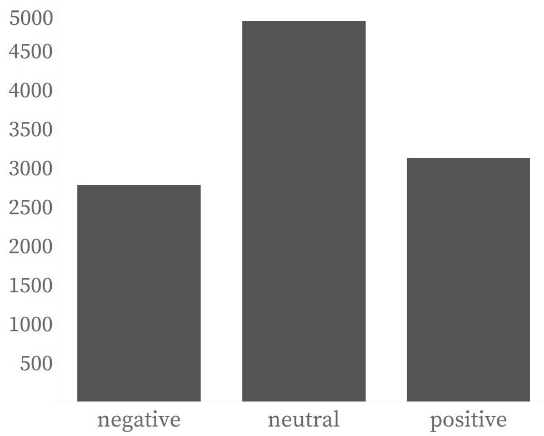
Source: personal computations based on the data from Reddit (2019).

Figure 3. Number of words per day used in Reddit posts and their subsequent comments – corpus data gathered from the Romania subreddit retrieved between 16 March 2020 and 16 May 2020



Source: personal computations based on the data from Reddit (2019).

Figure 4. Frequency of Reddit posts per category of sentiment based on the corpus data gathered from the Romania subreddit retrieved between 16 March 2020 and 16 May 2020



Source: personal computations based on the data from Reddit (2019).

When comparing the normalized mean values for the polarity scores per day, some peaks relate with the increases and decreases in the numbers of deaths and registered incidents of CoVID-19 in Romania (Figure 5). For some increases in the number of declared occurrences of the disease, Reddit more positive posts seem to be recorded, which comes as unexpected from the normal reaction in such situation. This could either be perceived as an outburst of ironical posts, which is easily misinterpreted by the classical sentiment analysis tooling or, simply, as an optimistic attitude in this population in particular which might be more knowledgeable in terms of the virus, as in the study of the knowledge, attitudes, and practices of the Chinese people during the rise of COVID-19 pandemics (Zhong, et al., 2020).

To understand how these variables correlate with each other, we have computed a correlation matrix between the daily mean word length of the posts in the BOW, their daily mean computed Vader score and the number of CoVID-19 caused infections and deaths (Table 3). As shown in the matrix, the infections and deaths have a high positive correlation, which is not surprising as these variables are dependent on each other: the number of infections influences the number of deaths caused by the virus. What is interesting to notice is that the number of words used in the BOW posts are correlating positively with the number of CoVID-19 infections and so does their computed Vader score. Even though the correlations are not high, they can still be significant when compared to the events occurring during the 59 days that were studied here. Going further with the analysis, we have plotted a time series graph to better observe the behaviour of the Vader score in relation to the registered infections and deaths.

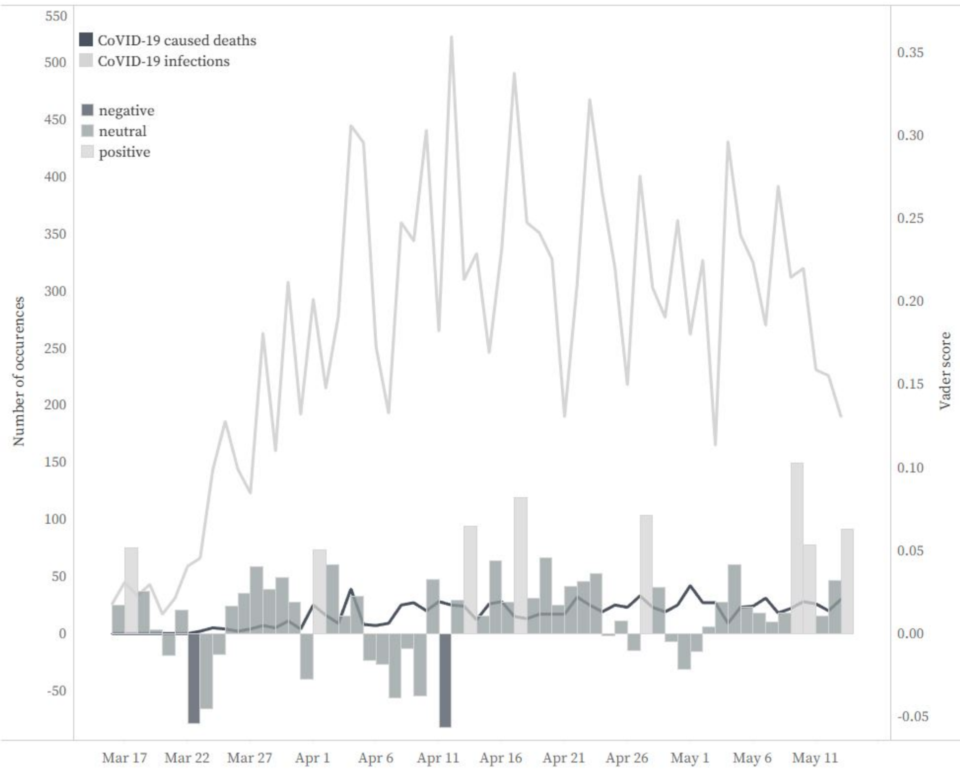
Table 3. Correlation matrix between the posts' in BOW word length, the posts' computed Vader score and CoVID-19 caused deaths and infections as per the statistics provided by the European Centre for Disease Prevention and Control

	Posts' Word Length	**Posts' Vader Score**	**CoVID-19 infections**	**CoVID-19 caused deaths**
Posts' Word Length	1	0.005207	0.269617	-0.0318
Posts' Vader Score	0.005207	1	0.23694	0.18521
CoVID-19 infections	0.269617	0.23694	1	0.613265
CoVID-19 caused deaths	-0.0318	0.18521	0.613265	1

Source: personal computations based on the data from Portal (2020).

During the first weeks of the state of emergency, the analysis reveals that people were expressing more negative feelings than during the latter stages. This could be interpreted as an accommodation of the population with the situation of the country as well as a possible acceptance coming from the Reddit users of Romania. Right before the end of the official state of emergency, people seem to become more enthusiastic as multiple peaks of positive feelings are recorded in the data. This could be easily seen as a positive and optimistic attitude towards the end of the uncomfortable state and the beginning of some more relaxed times. Once again, by analysing the entire set of records for this period, we find out that the general attitude of the population is a neutral one during most days, with 8 days of positive sentiments expressed in the posts of the studied subreddit and only 2 days of slightly negative feelings.

Figure 5. Time series analysis of the evolution of the normalized polarity scores compared to the cases and deaths caused by CoVID-19 - corpus data from the Romania subreddit retrieved between 16 March 2020 and 16 May 2020

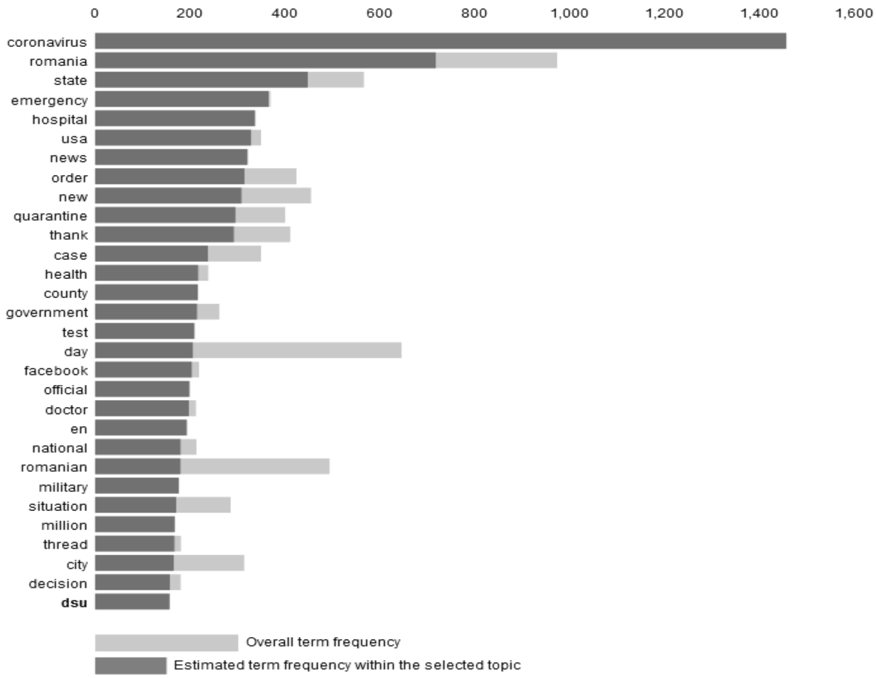


Source: personal computations based on the data from Reddit (2019).

The topic modelling with the LDA algorithm (Figure 6.a) has revealed, for one topic, a primary interest into the topic of Romania's state of emergency caused by CoVID-19: "coronavirus", "Romania", "state" and "emergency" are the top four tokens by relevance in this topic. This comes as a good proof of the fact that the population of the country which usually use Reddit has a keen interest in discussing the latest news both at the country level and at an international level regarding the state of emergency installed. Words like "Bucharest", "Cluj", "national" and "Romania" are pointing us into the direction of discussions of the implications that the virus CoVID-19 has at the national level. On the other side, the term "USA" is identified in the top 10 words used in the modelling of the first topic, as well as the term "news", which again helps us to identify the same interest of discussion. The words "hospital", "quarantine", "case" and "health" are shaping the unanimous concern around the virus' implication in the health system, therefore people are expressing their opinion on the well-being of the country's population in the times of this social crisis.

Figure 6. LDA Topic modelling results for the two most prominent topics discussed in the corpus data gathered from the Romania subreddit retrieved between 16 March 2020 and 16 May 2020

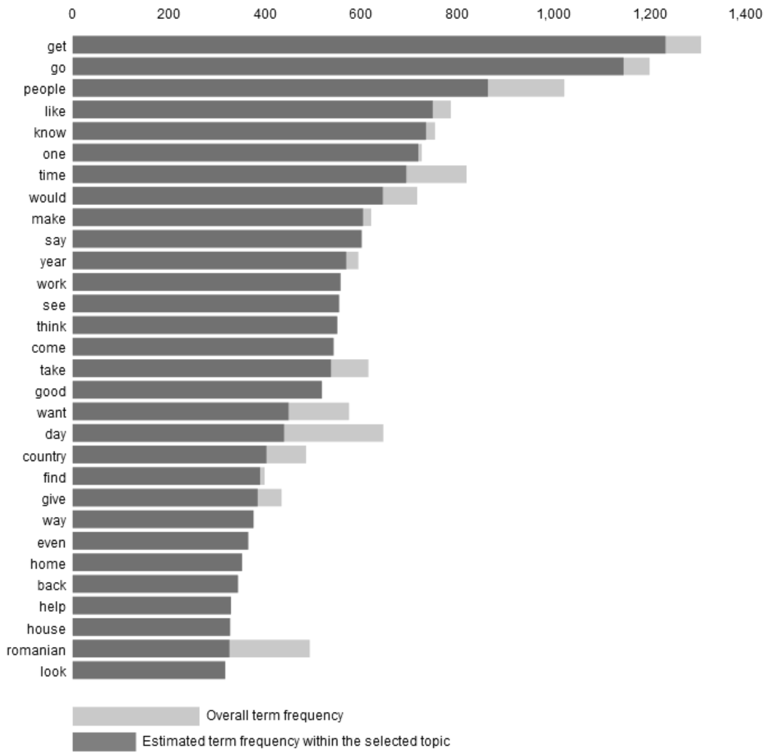
a) Top-30 Most Relevant Terms for Topic 1 (34.7% of tokens)



Source: personal computations based on the data from Reddit (2019).

As for the second topic (Figure 6.b), it seems that people might be discussing actions, such as regular activities in their daily lives: “get”, “go”, “make”, “know” or “work”. The coverage the tokens in this topic is widely spread, with a percentage of 66.5% of the words used. This is because these are commonly used verbs one would prefer when writing non-formal text in general. Tokens like “good” or “like” imply a positive attitude in this topic, which seems to be at the opposite side when compared to the main topic where the dominant feeling would rather be neutral to some words indicating maybe a more negative connotation driven from words like “hospital” and “quarantine”. Moreover, the terms “day”, “home” and “house” present in this topic, bring stronger proof that on the second basis the discussion is focused on the daily living activities of people.

b) Top-30 Most Relevant Terms for Topic 2 (66.5% of tokens)



Source: personal computations based on the data from Reddit (2019).

Discussion

Our research opens a new gate towards the contribution of text mining with social data in the times of a social crisis, with a study case that is focused around the unusual situation caused by the CoVID-2019 pandemics. By analysing what Reddit users have posted during the state of emergency declared in Romania, we have come closer to the understanding of both the overall and daily reaction to this atypical situation our society had to face. Our analysis focused around word and sentiment frequencies, as well as on topic modelling.

First, our initial analysis revealed an extremely high frequency of the word "coronavirus", followed by other terms which implied a general concern around the pandemics and its ramifications. Hence, along this preferred term, "quarantine", "Romanian", "people", "hospital" or "state" were some of the most frequently used words. This brings us close to shaping a global topic that was intensely discussed among Romanians, a topic that was also confirmed by our last stages of the research, the LDA topic modelling. Knowledge was naturally built on top of our findings and a consistent number of conclusions were drawn from only modelling the topic of the Reddit posts.

Going further with the analysis, the overall feeling identified in the corpus of the posts is a neutral to positive one, implying that people were mostly discussing the facts with a few outbursts of more powerful feelings. In this context, we could state the social media represented by our study audience is not necessarily a means to express strong feelings as it is more of an instrument to debate the shortcomings of the pandemics and, probably, its theoretical considerations. However, by analysing the time evolution of the words' frequency in the corpus and the sentiment scores of the posts per day, we could easily derive significant conclusions upon both the tendency to post more in times of important events and the way the feelings were expressed before and after these events.

This research has ultimately come as a contribution to the theoretical findings upon the sociological reaction in times of a crisis as well as the practical implications of using data mining with social media corpus. As per the results of the present analysis, we have taken an insight into what is it that the people in Romania which are using Reddit as a social media platform are discussing about and which is the polarity expressed within the text they are composing in this manner. Our findings revealed that, during a social crisis, in this case caused by the CoVID-19 pandemics, people are actively discussing around the cause of the crisis, the virus itself and around the implications it has upon the well-being of the society. The forum nature of the Reddit platform allowed us to explain why is it that the text discussed and analysed during the lockdown in Romania had an overall neutral to positive feeling. Using the most common text mining techniques has allowed us to understand the social impact the CoVID-19 pandemics with its consequent lockdown had upon Romania's young to middle-aged population that is using Reddit.

We are also rising a few concerns regarding first the generalizability of our dataset as we have used here a limited sample and might not fully represent the population of Romanians who are knowledgeable about CoVID-2019. As (Lazer & Radford, 2017) pointed out, “All of Twitter is a census of Twitter”, hence all of Reddit is a census of Reddit. This study can well be continued by analysing what Romanians were discussing on other social media platforms such as Twitter and Facebook to grasp the overall feeling expressed by some different categories of users from these platforms. Second, the ethics of analysing big data in sociology (Herschel & Miori, 2017) should be addressed by both this study as well as any other related one. This means that a certain emphasis should enhance the vulnerabilities of the findings and proposed methodology in the future research. Our aim was to exclusively arrive to a better understanding of how people are facing the serious times of a crisis and not to use these findings for any unethical purpose.

Conclusions and future implications

The present research has resulted into both expected and surprising results: people in Romania have proven to be mainly posting about CoVID-19 issues related to their lives with a general neutral to positive sentiment. In the dynamics generated by the exchange of posts and comments constructed on the Reddit platform, the Romanian users have proven to change their overall expressed sentiments from negative spikes at the beginning of the state of emergency to more positive ones towards the end of this period. This could be interpreted as a general concern among the population of the country that socializes using Reddit around the implications the virus has within the daily social activities of the individuals. When analysed against important events occurring in the country, the polarity scores’ fluctuations could be contextualized.

To improve and expand our study for the future we target an application of the present methodology to other popular social networking platforms such as Facebook and Tweeter for a wider targeted audience. In this way, our analysis will address other categories of social media users, which might bring more valuable information to this research. Also, we aim more in-depth sentiment analysis for the Reddit thread specially dedicated to CoVID-19 to identify patterns and tendencies across time. To fully extend this study in this direction, a full analysis of the comments of all analysed posts is desired for a better understanding of how people are reacting to other people’s posts. We expect the reactions to be stronger and hence to reveal interesting patterns among the sentiments expressed in Romania’s subreddit. To take this research at an international level, we aim for a comparison of the tendencies identified in Romania with the posts people have discussed worldwide.

ABBREVIATIONS:

BOW	Bag of Words
LDA	Latent Dirichlet Allocation
CoVID-19	Coronavirus Disease 2019

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