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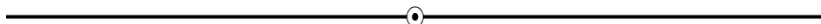
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THEORY, HISTORY AND LITERARY CRITICISM

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Humour of Workers Protests and Economic Inequality in South Africa

Idowu James Adekunle*

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Abstract:

This study explores the intersection of humour and social activism in South Africa, focusing workers protests through the lens of Carl Jung's psychoanalytic theory. A live video recording of Trevor Noah's standup comedy serves as the primary data source, offering a unique perspective on the role of humour in reflecting and shaping social narratives. Using performance analysis, the study examines how humour is employed to critique and challenge social injustices, highlighting the complexities of power dynamics and resistance in South Africa. The analysis reveals how humour can be both a coping mechanism and a form of resistance, allowing individuals to navigate and challenge oppressive systems. The findings suggest that humour can play a crucial role in social activism, providing a platform for marginalized voices to be heard and amplifying demands for social justice. This research contributes to a deeper understanding of the relationship between humour, power, and resistance, offering insights into the ways in which humour can be harnessed to promote social change and challenge systemic injustices in South Africa.

Keywords: workers, activism, stand-up performance, protest, inequality

Introduction

Stand-up comedy has long been recognized as both an ancient and modern performative practice, serving diverse roles across cultures and societies (Adekunle, 2009: 29; Adekunle, 2014: 68; Adekunle, 2017: 14; Adekunle, 2025: 82). Beyond its entertainment value, it is a communicative medium for peacebuilding and reconciliation among people of different nations, races, tribes, ages, and genders (Adekunle, 2024: 1). Its performance not only entertains but also addresses serious issues such as terrorism, kidnapping, and armed banditry, situating humour within global security concerns (Adekunle, 2025:40).

As a form of live theatre, stand-up performance offers its audience mirth and relief (Adekunle, 2020: 11), while functioning as a therapeutic tool in gender conflict resolution (Adekunle, 2020: 11; Adekunle 2021: 11; Adekunle 2023: 169). It equally critiques gender disparity across racial and cultural boundaries (Adekunle, 2019:135; Owen, 2022: 10),

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and operates as a corrective platform against police brutality (Adekunle, 2023: 12). Adekunle (2022: 80) emphasizes its linguistic richness, satirical power, and engagement with social ills, while also positioning it as a poetic oral art form rooted in cultural traditions (Adekunle, 2021: 39).

Stand-up comedy is not limited to cultural critique; it also intersects with tourism (Topler, 2022: 62), law (Alkiviadou, 2022: 50), and everyday social realities (Olson, 1988: 128). Scholars highlight its ability to reflect and refract contemporary society (Olson, 1988), to represent collective fears and hopes (Tafoya, 2009: 2), and to expose folly and irrationality through caricature and hyperbole (Holman, 2001: 36). In this sense, it is both a dramatic literature of amusement (Mintz, 1985: 71) and a stage performance grounded in visuals, histrionics, and social commentary (Onyerionwu, 2010: 3; Adekunle, 2017: 66).

Theories of humour further explain its social impact. Raskin (1985: 30) outlines three central frameworks – social-behavioural, cognitive-perceptual, and psychoanalytical – each linked to the suppression of depression in audiences. Kirkman (2006: 27) regards contradictions as the cognitive elements that provoke laughter, while Rutter (1997: 21) critiques the limits of incongruity theory in explaining comic structures. Adekunle (2014: 96) adds that hyperbolic humour lampoons societal weaknesses, while Limon (2000: 10) underscores the unique quality of laughter produced by live stand-up shows.

Physiologically, comedy contributes to stress reduction, blood pressure control, and immune support (Rutter, 1997: 13), making it both medicinal (Okon, 2010: 4) and stabilizing (Adekunle, 2009: 12). Afolabi (2002: 8) affirms that it embodies intellectual, physical, and spiritual human experiences in their most natural forms. Koziski (1984: 114) suggests that it addresses existential anxieties through laughter, positioning humour as a device for explaining human concepts of good and evil.

Scholars have also compared the stand-up comedian to historical figures such as the court fool, whose immunity permitted social critique (Ajayi, 1982: 13; Adeleke, 2001: 3). In Igbo culture, madness itself could serve as a mask for fearless truth-telling (Ezenwa-Ohaeto, 1999: 122), while Bodunde (2001: 95) reads this “madness” as an artist’s license to question authority. Radcliffe-Brown (1940: 195–196) interprets such performance as “permitted disrespect,” a balance of friendly and antagonistic expression.

At its core, stand-up comedy establishes a strong relational bond between performer and audience (Ross, 1988: 99), generates laughter in a relaxed atmosphere (Borns, 1987: 16), and functions as a painless way of acknowledging human folly (Grainger, 2010: 23). Katayama (2008: 217) even describes it as a levelling art form that transcends class, race, and culture.

While these critical perspectives have explored stand-up comedy's therapeutic, social, cultural, and political functions, little attention has been given to its role in labour struggles. This study, therefore, examines how South African workers deploy social activism to demand economic rights and challenge inequality as revealed stand-up performance below.

Theoretical Framework

The study is grounded in Carl Jung's psychoanalytic theory, which provides a framework for understanding the role of humour in social activism. Key concepts from Jung's theory that are relevant to this study include:

The Collective Unconscious

Jung's concept of the collective unconscious suggests that certain universal symbols, called archetypes, are shared across cultures and time. In the context of humour and social activism, the collective unconscious helps explain why certain types of humour resonate with people and inspire collective action.

The Shadow

Jung's concept of the shadow refers to the repressed or hidden aspects of the personality. In the context of social activism, humor can be used to confront and challenge the shadow, bringing attention to issues that are often ignored or suppressed.

Compensation

Jung's concept of compensation suggests that the unconscious mind can compensate for the one-sidedness of the conscious mind. In the context of humor and social activism, humour can be used to compensate for the powerlessness and marginalization experienced by certain groups, providing a means of resistance and empowerment.

Methodology

The study employs a qualitative research approach, using performance analysis to examine the role of humour in social activism. The methodology includes:

Data Collection

A live video recording of Trevor Noah's standup comedy serves as the primary data source. The recording is analyzed to identify themes, patterns, and meanings related to humour and social activism.

Performance Analysis

The study uses performance analysis to examine how humor is employed in Trevor Noah's standup comedy to critique and challenge social injustices. This involves analyzing the language, tone, and delivery of the comedy, as well as the audience's response.

Data Analysis

The data is analyzed using a thematic analysis approach, identifying patterns and themes related to humour and social activism. The analysis is guided by Carl Jung's psychoanalytic theory, which

provides a framework for understanding the role of humour in social activism.

Interpretation

The findings are interpreted in the context of the theoretical framework, highlighting the ways in which humour is used to promote social change and challenge systemic injustices in South Africa.

Results and Discussion

In South Africa, Trevor Noah comments in the excerpt below on the maladministration of top governmental functionaries, the nation's political gladiators' acts of corruption, and nonchalant attitude of the nation's government workers. Top government functionaries and the nation's political gladiators have sabotaged the economy of the nation; and letting the masses suffer a great deal, from the hardship of the economic perils. This effect has greatly affected every sector of the nation's economy. It has also led to insistent strikes of the National Union of Workers in South Africa. There is total showdown in the nation. Every sector is going down the drain. The end product of this economic hardship has made the workers unproductive and nonchalant to their work. Everyone work under tensions and loses interest in their work. The nation's political leaders lack frugality in expenditure of money and resources. They spend extravagantly on themselves, leaving the masses to suffer. They go scot-free without anyone serving as a check on their authority. Gould (2014:1) testifies to this that "the state was deeply corrupt at all levels, and those who held positions of power, whether as politicians or functionaries, were very seldom called to account before a court for acts of corruption or the abuse of power." Gould further reveals that the corrupt government officials appear to act with impunity, or cynically, by using the criminal justice system to dodge very serious allegations of their abuse of power and mismanagement of the state resources. By so doing, many of the South African citizens lack respect for the rule of law.

Trevor Noah:

Something I feel we have lost in South Africa, is part of our culture, we used to be a friendly nation. We used to be people of smiler, people of talkers, now, we got that thing, that anger, that distrust when we look at one another. I know what happens; we just lost it you know. You see workers in this country; they are so angry. All the workers, they are on strike, you know. We have 99 strikes this year alone, 99 strikes, costing us billions. All different sectors: National Mining Workers, Union of Metro Workers, Petrol Attendances, yea, they are threatened to burn petrol station down [say]: "we come into the crowd with our petrol bomb. We just need someone to pour petrol for us, because we are on strike". Refuse law [lampooning the Unions of Workers]. Everyone was on strike, but there is one strike in particular that occurs to me, City Power. You see that, the illegal strike of city power that left thousands of households in Johannesburg, without electricity. One household in particular occurred to me, the House of

Nelson Mandela. In the mid of the night out of nowhere, you know now horrible that must have been. Nelson Mandela does not need electricity for his Big Screen TV's people. Nelson Mandela needs that electricity "because he has machines keeping him alive" That Is Critical but Stable. I don't know, what that means. The government told me, is in oxymoron, Critical but Stable. How is Bafana doing? They all losing, but dwindling. But no electricity in the house of Nelson Mandela, guys. You, I said, this the second time we let him down, second time. The first time was with the ambulance, you remember that, yea. Nelson Mandela got lung infection; he needed to go to the hospital. Ambulance picked him up from his home and then got stuck on the side of the highway for Four Hours, Four Hours...Many people in Parliament have four to seven cars everywhere they go, causing chaos on the road. Many people have been killed by them, crushing into cars, because they are always in a hurry. Why are you given bodyguards? I don't understand? Yes, some people here, like President, yes, giving bodyguards, Minister of Finance, keeping our money, yes, bodyguards. Why some Ministers are just wasting money? Minister of Agriculture, why are you even in a hurry? You have a lowest portfolio. Why are you going? Nothing happens in Agriculture hurry. Why are you in a hurry? Why do you have bodyguards? Who is trying to kill you? The cabbage Mafia, eh, no guys, just be in the traffic and shut up, stop wasting our money (Trevor 2015 (Appendix SA)).

In the above excerpt, Noah is seriously calling his fellow South African people to order, through communal consciousness and social enlightenment. He wants them to be patriotic citizens of the nation. This is a clarion call to nation building, and unselfish interest of individuals. The people have lost trust in one another. They are bitter in carrying out their responsibilities, to their nation, and to one another "all the workers, they are on strike, you know. We have had 99 strikes this year alone, 99 strikes, costing us billions. All different sectors: National Mining Workers, Union of Metro Workers, Petrol Attendances, yea, they have threatened to burn petrol station down". Therefore, Noah Trevor sees the industrial action as a "refuse law". It means that "the industrial action" is unrecognized and illegal. Apart from this, "the 99 strikes" and "industrial action" are connotatively referred to as obstacles that decline the nation's growth, development and capacity building.

The economy has been sabotaged, through insistent strike, and corrupt practices of the top government functionaries. The nation's workers went on strike for 99 times in a single year. The workers were not paid; and all the money and the resources that are meant for the nation's capacity building and development are diverted to their own personal purses, and used for their selfish interest. This has caused insistent power failure in South Africa, across every nook and cranny of the nation. The illegal strike of the electric power workers has left thousands of households in total darkness, especially the house of Nelson Mandela, the country's national hero and freedom fighter, and the former President of the country. Mandela fought for the nation's freedom, at the expense of his life.

However, Mandela was highly disappointed, when he needed the nation's help. There was no electric power supply that was needed to keep his life-support machine working, to keep him alive: "everyone was on strike, but there is one strike in particular that occurs to me... the House of Nelson Mandela. Nelson Mandela needs that electricity because he has machines keeping him alive". In this critical moment of Nelson Mandela's life, things became worse for him. He was completely neglected to his fate. The only consolatory message the country's higher authority gave to her citizenry is that Mandela's condition is critical, but stable. Noah ridicules the South African Government for such a statement issued on Mandela's health. He sees this expression as an oxymoron; as a way of playing pranks on South African citizenry. It is a way of dodging governmental responsibility towards Mandela, and, at the same time, using it to hide their weaknesses for not being able to act on time, for his rescue "that Is Critical but Stable. I don't know what that mean".

In the same vein, when Mandela has lungs infection problem, he needed an ambulance to take him to the hospital. Ambulance picked him up from his home, and, then, got stuck on the side of the highway for four hours. There was no escort to pilot the ambulance to the hospital. He suffered for several hours in the traffic jam. Mandela was held up for several hours. This is to show how inhumane the higher authorities of the nation are towards their fellow citizens. They do not care for the safety of lives of their fellow citizens. Mandela was abandoned in the critical moment of his life "Nelson Mandela got lung infection; he needed to go to the hospital. Ambulance picked him up from his home and then got stuck on the side of the highway for Four Hours, Four Hours". This is a high level of inhumane and degrading treatment of Nelson Mandela, and the entire humanity. To support the view of Trevor Noah, Brodie (2014: 5) asserts that "if this was done it would go a long way to empowering communities to better understand and respond to safety issues. Access to information would promote a more active citizenry to become involved in contributing to public safety as envisaged in the National Development Plan".

Moreover, instead of the Parliamentarians showing concern about the welfare of their people, they keep on acquiring wealth for their own selfish interest, and leaving the people to die in abject poverty. Some of them have four to seven cars as escort everywhere they go. They are wasting the nation's money and resources. Some of their cars run into the crowds and kill several people. They are always in a hurry. They keep bodyguards around. According to Noah, some Ministers, like Minister of Agriculture, are not meant to be given bodyguards or be in a hurry when going to their duty posts, or going for their official assignments. There is nothing urgent in the Ministry of Agriculture, so, why should the Minister of Agriculture be in a hurry, or have many bodyguards? These are the

interrogative questions that the stand-up comedian, Trevor Noah, is asking “many people in Parliament have four to seven cars everywhere they go, causing chaos on the road. Many people have been killed by them, crushing into cars, because they are always in hurry. Why are you given bodyguards? I don’t understand? Why some Ministers are just wasting money? Minister of Agriculture, why are you even in a hurry? You have a lowest portfolio. Nothing happens in Agriculture hurry”. This is to show the extent of decadence in the South African nation. The political leaders are uncaring, inhumane, and absolutely corrupt. They see themselves as larger than the entire society. They are completely rulers not leaders. Rulers are dictators, while leaders lead by examples.

In conclusion

Gould (2014:1) confirms that “we thus entered our new dispensation with impunity entrenched, and so it has remained for those who hold positions of power and influence”. The ruling classes hide under impunity to perform their nefarious activities. They do whatever they like without anyone restraining them. This is the main reason why Trevor Noah uses this stand-up to conscientize his audience, the South Africans, about their rights. He wants them to fight for their rights and also liberate themselves from the hands of the ruling class.

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Hamletul contemporan și instinctul vital: Ian McEwan, *Coajă de nucă*

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Contemporary Hamlet and the Vital Instinct: Ian McEwans, *Nutshell*

Abstract:

The study aims to analyze one of the recent narrative rewritings of Shakespeare's tragedy *Hamlet*, namely the novel *Nutshell* by Ian McEwan (2016), following the artistic and ideological effects of the British writer's intervention in the known plot. My interpretation detects, as an axis of textual coherence, the psychoanalytic dimension – in a Freudian line – of the mother-son relationship to which the novel gives a physical content by imagining an unborn Hamlet, in umbilical dependence on the mother's womb. Also, the reversals of vision that lead to the configuration of a contemporary Hamlet, the product of a consumerist and hedonistic society, are revealed: the vital instinct, the offensive attitude, individualism.

Keywords: Shakespeare, Ian McEwan, psychoanalysis, vital instinct, individualism, criticism of contemporary society

Între tragediile shakespeariene, *Hamlet* este piesa care a provocat cele mai lungi și mai controversate dezbateri critice și teatrologice, dar și cele mai numeroase prelungiri literare, de la influențe sau motive lirice la intertextualități sau rescrieri integrale în dramă și roman. Literatura, teatrul și filmul și l-au adjucecat deopotrivă și studiile complexe dedicate piesei nu ostenesc să consemneze ampla circulație a avatarurilor sale în variate medii de expresie. Dintre cele recente, Nicoleta Cinpoș și George Volceanov scriu, în prefața ultimei traduceri în românește a piesei (2016: 50-58), istoria montărilor ei scenice și filmice, iar Pia Brânzeu, în *Fantomele lui Shakespeare*, vol. I (2022: 297-299) alcătuiește o listă selectivă, dar deja copleșitoare, de titluri care configurează „oceanul intertextual” al poveștii prințului danez. O poveste atât de reiterată, arată autoarea, încât a pătruns până și în cultura pop sau media generând o mulțime de experiențe de creație apocrife.

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Desigur că raportul unei opere cu numărul de replici pe care le-a generat e o diagnoză fidelă a autorității sale în canon. Dintr-un unghi mai specific, proteismul lui *Hamlet* apare ca o funcție a complexității și a indeterminării textului, a „deschiderii” sale, a implicațiilor asupra cărora Shakespeare tace, a sensurilor niciodată fixate, a psihologiilor fluide care nu se lasă descifrate până la capăt. Între acestea, ambiguitatea funciară a protagonistului a condus spre explicații multiple: prototip al omului modern (Muriel Bradbrook), personaj irațional care atrage o suită de morți (Joyce), intelectual care trăiește sciziunea dintre tradiția medievală războinică și morala umanistă a Renașterii (Bloom) sau ilustrare a complexului oedipian, dublul lui Claudius – omul care-i arată realizarea propriilor sale dorințe infantile refulate (Freud).

Procedeele rescrierii textelor canonice se regăsesc în „cazul Hamlet” în toată diversitatea lor și adesea mixate: de la modificarea cursului acțiunii sau recontextualizarea ei pe alte coordonate spațio-temporale, la privilegierea perspectivei unui personaj secundar – Claudius, Gertrude, Ofelia, Horațio, Fortinbras, Rosencrantz, Guildenstern. Dintre rescrierile ce privilegiază invenția, o perspectivă spectaculoasă oferă romanul *Coajă de nucă* al lui Ian McEvan (*Nutschell*, London Review Bookshop & Jonathan Cape, 2016; traducere în română și note de Dan Croitoru, Polirom, 2019), care imaginează un *prequel* al lui *Hamlet* în zilele noastre, cu modificarea până la limitele ficțiunii ipotetice a scenariului crimei și al răzbunării.

Întrebarea hamletiană „A fi sau a nu fi?” devine în viziunea scriitorului britanic „A te naște sau a nu te naște?”, căci tragedia prințului danez stă sub semnul unei posibilități fantasmagorice, al lui „Ce-ar fi fost dacă?”, și exploatează valențele acestei ucronii pentru mentalul contemporan. „Ce-ar fi fost dacă Hamlet ar fi știut de dinainte de complotul unchiului și al mamei sale împotriva tatălui? sau, într-un plan mult mai general, „Cum ar fi să avem dreptul să hotărâm dacă vrem sau nu să ne naștem într-o lume a cărei configurație, la micro și la macronivel, o putem cunoaște dinainte, încă din viața intrauterină?”. Hamletul său se află în pântecul lui Trudy (Gertrude), de unde asistă la ticluirea complotului și chiar la punerea lui în practică. Construindu-și trama narativă pe aceste mutații majore, Ian McEwan deconstruiește ideea de destin, ca sumă a faptelor deja consumate, mută centrul de greutate de pe cunoaștere și analizează pe acțiune și face din povestea lui Hamlet un *thriller* captivant care rămâne până la final cu destule spații „albe” (între care, adevărata paternitate a fătului sau rolul jucat de Elodie–Ofelia în identificarea vinovaților). Să fi intenționat scriitorul să sugereze că aceasta ar fi atitudinea adecvată unui Hamlet al zilelor noastre, individualist, deși moral și încărcat cu toate lecțiile și sedimentele culturale adunate în timpul scurs de la Evul Mediu danez până la Anglia începutului de mileniu trei? Pentru că, în totul, romanul

problematizează celebra aserțiune hamletiană „Pe toți ne face conștiința lași:/ Iar hotărârea, la-nceput robustă,/ Pălește de prea multă judecată” (Shakespeare, 2016: 386). Vechiul Hamlet a fost acuzat de psihologie anxioasă, temperament melancolic și paralizie în fața faptei. Febrila sa conștiință îl îndrumă întâi spre soluționarea procesului interior, inclusiv dobândirea dovezilor, și abia apoi spre acțiune. Hamletul de acum, cu nu mai puțină conștiință, deși știe totul, se află, obiectiv, în imposibilitatea de a interveni până ce descoperă că însuși actul nașterii sale poate fi declicul schimbării.

Astfel ESTE triumfă asupra lui SE PARE – textul reia, în variațiuni, replica celebră prin care Hamlet își înfruntă mama: „Îmi «pare»? Nu, chiar «e». Ce-i «pare», nu știu.” (Shakespeare, 2016: 173) –, naratorul fiind martorul ascuns al unui plan odios: Trudy pune la cale uciderea soțului său, John Cairncross (nu altul decât cel cu care și-a conceput copilul), laolaltă cu fratele acestuia Claude (*alias* Claudius), devenit amantul ei în chiar perioada sarcinii. Scopul nu este moștenirea unui regat, ci a unei clădiri masive în stil georgian de pe Hamilton Terrace, casa părintească a lui John, pe care agentul imobiliar Claude – un individ tern, clișeic, machiavelic, dar viguros sexual – o estimează la nu mai puțin de șapte mii de lire. Planul de principiu se concretizează brusc când John, om cultivat și, evident, boem și dezinteresat (căci e poet, profesor și patron al unei edituri obscure), pentru a o recuceri pe Trudy, înscenează, precum Hamletul shakespeareian, o „piesă în piesă”: îi prezintă acesteia o așa-zisă iubită în persoana unei poete debutante, Elodie, și îi declară că e împăcat cu relația pe care ea o are cu fratele său. Mai repede decât plănuise, cuplul adulterin și incestuos îl otrăvește pe John cu un *smoothie* în care s-a turnat glicol, mascând crima sub aparența unei sinucideri. Regia aproape perfectă se năruiește însă datorită unui mic detaliu și ucigașii se văd siliți să fugă din țară pentru a scăpa de arest. Dezbinați precum soții *Macbeth* – Trudy datorită remușcărilor, Claude datorită dorinței egoiste de a-și scăpa propria piele –, sunt împiedicați de nașterea intempestivă a fătului care, deși detestă ideea de răzbunare, declară că e prea mult și „intră în scenă” rupându-și cu unghiile sacul amniotic. Noul Hamlet își contemplă fericit mama frumoasă, iubitoare și criminală, pe care o va avea doar pentru el în închisoare, și e conștient că îi va fi părtaș în traseul ispășirii, singurul care poate recosmiciza lumea: „mai întâi căință, apoi dreptate, apoi un tâlc. Restul e haos” (McEwan, 219: 230).

Romanului i s-a imputat lipsa de plauzibilitate a vocii naratoriale, un fœtus de sex bărbătesc, în ultimul trimestru al sarcinii, căruia i se atribuie nu doar o activitate cerebrală, ci și o erudiție impresionantă, chiar rafinată. Un astfel de dispozitiv narativ e cel puțin intrigant, deși precedente mai sunt: filmul lui Amy Heckerling din 1989, *Uite cine vorbește*, sau romanul lui Carlos Fuentes, *Cristóbal Nonato* (1987),

inspirat de *Tristram Shandy* al lui Sterne. Sigur, există și incongruențe logice în motivarea acțiunilor (și mobilul crimei rămâne, realist vorbind, cel mai neconvingător), dar a acuza în ansamblu lipsa de acuratețe „biologică” înseamnă a eluda calitatea rescrierii de exercițiu ludic și contrafactual care nu mizează în întregime pe o poetică realistă, cum de altfel nici *Hamletul* shakespeareian nu o face, de vreme ce recurge la elemente *noir* precum vocea fantomei. Or jocul talentat al lui McEwan, a cărui notă distinctivă este „suprapunerea imaginației și a spiritului științific” (Nicolau, 2024: 59), completează perspectiva obiectiv limitată a naratorului printr-un exces auditiv venit dinspre cultura media pe care i-o furnizează radioul deschis nonstop sau podcasturile și audiobookurile ascultate de Trudy. Astfel capătă el păreri avizate despre lumea de dinafară și o informație substanțială în varii domenii, de la politica globală și genetică, la fenomene climatice, cultură, mentalități etnice și psihologii individuale. Literatură, mai cu seamă poezie, știe din conversațiile tatălui, iar despre relațiile din mica lume închisă în interiorul casei află trăgând cu urechea lipită de peretele placentei, făcând conexiuni, imaginându-și sau pur și simplu percepend tactil „vocea” trupului mamei (ce exprimă emoția, nerăbdarea, enervarea, frica, orgasmul, beția), trup care, cum știm dintr-o cunoscută aserțiune a lui Gheorghe Crăciun, „nu poate minți”, ba chiar „știe mai mult”. Din întreg solilocviul acestui făt rațional și ironic, se naște o ingenioasă comedie filosofică împletită cu tragedia. Constrângerea sa fizică elimină o mare parte din tensiunea palpabilă la Shakespeare și lasă să transpară romanul de mister și crimă, dar și romanul socio-politic al lumii contemporane, acțiunea fiind plasată în Londra anului 2015.

După faza cunoașterii oarbe, răsfrânțe înspre înăuntru (dar conexate la o metarealitate profundă, cum arată întreaga tradiție mitico-simbolică), surpriza ieșirii la lumină a acestui făt brilliant va fi cunoașterea vizuală prin care reprezentările proprii se ajustează, iar noțiunile abstracte capătă carnație. În totul, viața viscerală pare să fie un echivalent al etapei sustragerii din lume a lui Hamlet în propria nebunie inventată. Și totuși, în această „coajă de nucă” se află spațiul infinit. La fel ca în nuvela lui Scott Fitzgerald, *Strania poveste a lui Benjamin Bottom*, intrarea în viață înseamnă evoluție inversă de vreme ce în existența amniotică știi deja totul. Sau aproape totul căci, prin rectificările la care fătul e obligat, romanul pare să spună că numai viața reală, numai experiența oferă adevărata cunoaștere.

Dialectica *închis-deschis, înăuntru-afară, libertate interioară-libertate exterioară* pe care se altoiește intriga emerge din chiar motoul romanului preluat din piesa lui Shakespeare. În actul al II-lea, scena 2, *Hamletul* shakespeareian are o dispută cu Rosencrantz și Guildenstern pe tema închisorii subiective și a celei obiective. Pentru că doar gândirea face ca lucrurile să fie într-un fel sau altul, cum spune, lumea întreagă e

pentru el o închisoare și Danemarca una dintre cele mai rele: „O, Doamne! Aș putea să stau închis într-o coajă de nucă și tot m-aș simți Rege al spațiului infinit – numai de nu aș avea vise rele” (Shakespeare, 2016: 371). Cu acest intertext shakespearian, McEwan lansează dezbaterea morală asupra intervenției lui Hamlet de pe coordonatele închisorii concrete și în contrapondere cu libertatea conștiinței, căci, deși supus tuturor funcțiilor corporale ale mamei, fătul poate spune, prin cunoașterea nemijlocită de nicio stafie, „Nu pare! Este!”. „Coaja de nucă” nu mai e doar un concept abstract și o metaforă eficientă, ci însăși condiția sa fizică, ca reprezentare-limită a închiderii: uterul matern în care stai „fără niciun pic de spațiu”, „cu susul în jos”, cu „brațele încrucișate” și cu urechea lipită zi și noapte de „nenorociții ăștia de pereți” care lasă „visele rele” să se insinueze pe calea undelor sonore. O cămașă de forță menită să paralizazeze orice inițiativă sau „castelul elastic” de care prizonierul e legat printr-un „cordon uleios”. Între cele două închisori, cea fiziologică și cea punitivă de care și el, și mama sa vor avea parte în final, se desfășoară o întreagă aventură a gândirii dubitative pentru care personajul lui Shakespeare a rămas etalon.

Obsesia spațiului închis îi este specifică scriitorului britanic și ea se asociază și aici, ca și în *Grădina de ciment*, *Pe plaja Chesil* sau *Sâmbătă*, cu preocuparea pentru interioritate (Horton, 2016). Fătul percepe sexul amanților ca atentat la spațiul personal, Trudy se separă de soț invocând nevoia de spațiu, crima este pentru o casă, pedeapsa ei va fi închisoarea, acțiunea întreagă se petrece între pereții unui imobil etc. Cu adevărat închis e însă spațiul ce conține starea paradiziacă a existenței vegetative a fătului, stare care se evaporă în momentul apariției conștiinței – „șanțul meu neuronal s-a închis” (McEwan, 2019: 10) –, când lumea de dinafară răzbate înăuntru în reprezentări optimiste, dar și îngrijorătoare. O lume care e imaginea fidelă a dualismului omului contemporan „inteligent și infantil”, cum copilul în devenire află din prelegerea unui expert în relații internaționale, replică a monologurilor lui Hamlet despre condiția umană. Așa se explică faptul că avem parte și de conflicte armate, naționalisme narcisiste, proliferarea nucleară, migrații, pierderea libertății de exprimare, confuzia valorilor, dezastre climatice, dar și de incontestabilele avantaje ale civilizației: longevitate, știință, compasiune față de copii și animale, eradicarea molimelor și a analfabetismului, emanciparea femeilor, stomatologie fără dureri, tehnologie avansată. Infernul și Paradisul se conțin unul pe altul, căci „am construit o lume prea complicată și prea periculoasă pentru ca firea noastră certărească s-o poată gestiona” (*Ibidem*: 39).

Odată ce identifică vocile din jur și află de planul crimei și al abandonării sale, fătul se leapădă de solipsisme și de problemele generale ale planetei focalizându-se pe relațiile de familie și pe locul său în lume. Minte lui reacționează prin scenarii succesive, de la fantasme

răzbunătoare de substituție, la reprezentări patetice despre o viitoare viață de orfan dat în plasament, într-un cămin sau la o familie adoptivă, ceea ce n-ar însemna altceva decât privațiune la toate nivelurile: „o copilărie fără cărți, cu jocuri pe computer, zahăr, grăsimi și palme date peste cap” (McEwan, 2019: 58). Tot acum încep să se precizeze și complicatele implicații ale suprapunerii *maternității* cu *sexualitatea*. Introducându-le în povestea crimei, McEwan plasează clar povestea fătului în orizont psihanalitic și ne putem întreba dacă dispozitivul său narativ nu țintește să ofere o replică „arhetipală” la complexul oedipian atât de invocat în cazul prințului danez. Sau dacă întreg solilocviul naratorului nu poate fi interpretat ca un vis urât al lui Hamlet, vis în care dorințele sale inconștiente, îndreptate către mamă și împotriva tatălui, capătă contur precis. În orice caz, în istoria fătului, Freud e desenat în filigran și romanul stabilește cu textul sursă același tip de relație precum *Oedip* cu *Hamlet*, adică fața și reversul monedei: „În *Oedip*, spune Freud, ca și în vis, este adusă în lumină și realizată fantasma de dorință a copilului; în *Hamlet* ea rămâne refulată și nu aflăm despre existența ei – așa cum se întâmplă și în nevroză – decât datorită efectelor inhibitive care decurg din ea” (2009: 319).

Prin dependența ombilicală a fiului de mamă, McEwan dă conținut fizic legăturii lor psihanalitice. Tot astfel, repulsia fătului față de Claude primește și o explicație sexuală, unchiul „priapic și satanic”, sensibil devalorizat față de originalul său shakespearian, fiind motivul pentru care instinctul matern al lui Trudy pălește în fața celui erotic. În rețelele subterane ale textului capătă sens și sugerarea nimfomaniei lui Trudy, cea care, cu două săptămâni înainte de a naște, își preludează escapadele sexuale cu un vin de Sancerre Domeniul Jean-Max Roger sau cu un Sauvignon Blanc de Malborough. În aceste condiții, marea traumă fizică și emoțională a fătului este să stea cu penisul lui Claude „la câțiva centimetri de propriul nas” (*Ibidem*: 32), situație mai stresantă decât dacă ar avea la cap un pistol. Scenele de acuplare nebună dintre amanți sunt pentru el o provocare la Zidul Morții, stârnind turbulențe care „ar face să desprindă și aripile unui Boeing” (*Ibidem*: 33). Se consideră victima mecanismului sexual îndreptat către „castelul gonflabil” care-i ține loc de casă. Și nu e vorba numai de periclitarea sarcinii atât de avansate, ci și de fantasma unei genetici degradante: „mi-e groază [...] că o să-mi însămânțeze creierii cu lichidul lui, cu sămânța fecundă a banalității sale. Apoi, din cauza leziunilor cerebrale, o să gândesc și o să vorbesc ca el. O să fiu odrasla lui Claude” (*Ibidem*: 33). Când, după uciderea lui John, fătul rămâne ultimul balast ce trebuie aruncat pentru ca viața cuplului să fie confortabilă și îndestulătoare, și relația sa cu substitutul de tată ajunge să se precizeze în termeni de ori / ori. Nu ne mai mirăm că, în inegala luptă corp la corp, în care se insinuează ideea de asasinat, fătul are la un

moment dat o tentativă de sinucidere, încolăcindu-și cordonul ombilical în jurul gâtului:

... din câte îmi dă de știre somiera, se pregătește să-și lase greutatea pe mine.

Planul meu? Claude își croiește drum către mine, așa că trebuie să acționez rapid. Ne clătinăm, oasele ne trosnesc sub presiunea enormă. Un sunet electronic de înaltă frecvență îmi țiuie în urechi, iar ochii mi se bulbucă și mă ustură. Am nevoie să-mi folosesc brațele, mâinile, dar aici e extrem de puțin loc. O s-o zic repede: mă voi sinucide. O moarte infantilă, adică o omucidere provocată de asaltul necugetat al unchiului meu asupra unei femei gravide aflate spre sfârșitul celui de-al treilea trimestru de sarcină. Vor urma arestarea, procesul, pronunțarea sentinței, încarcerarea. Moartea tatei va fi pe jumătate răzbunată. Pe jumătate, pentru că în Britania cea bună la suflet ucigașii nu sunt spânzurați (*Ibidem*: 151).

Dacă relația cu Claude e decisă de la început, cea cu tatăl (natural sau doar declarat?) și cu mama stă sub semnul ambiguității. Pe măsură ce acțiunea avansează, și convingerile inițiale ale Hamletului modern încep să se clatine, ajungând să descopere, ca și omologul său shakespearean, ecartul dintre aparență și esență. Tatăl se dovedește a fi o sumă de incongruențe, el are, cum bine observă Ana-Maria Cornilă-Norocea (2019: 438), „o identitate presupusă, o identitate în suspans și o identitate reală”. Se pare că a avut o relație reală cu Elodie, „poeta bufnițelor”, dar cu adevărat gravă e totala sa indiferență față de soarta viitorului copil: „În graba lui spre propria-i renaștere, a aruncat-o la gunoi pe a mea” (McEwan, 2019: 90). Ne putem legitim întreba de ce noul Hamlet nu decide să-și rupă sacul amniotic în momentul de maximă tensiune, cel în care John e pe punctul să bea otrava, ci se mulțumește cu fantasma unei scrisori ultimative în care îl previne asupra crimei în schimbul recunoașterii sale ca fiu. Cititorul nu poate decât să deducă nepăsarea sa față de salvarea acestui tată lipsit de instincte paterne și chiar curiozitatea legată de reușita complotului. Starea prenatală e transformată astfel într-un fel de autojustificare hamletiană a inacțiunii și a neputinței, mai degrabă decât într-o imposibilitate reală de a acționa. Ca rezultat, avem un Hamlet cinic, care la nivelul declarațiilor pare să urmeze ideologia strămoșului său literar – pedepsirea crimei și a infidelității, sentiment filial etc. –, dar care se deconectează de fapt de la orice altă instanță decât sinele propriu.

Relația cu Trudy este, prin forța lucrurilor, cea mai complexă: o simbioză ce devine iubire necondiționată și posesivitate declinate spre erotism. „Infidela mea Trudy după ale cărei brațe și ai cărei sâni albi ca pulpa mărilor și ochi verzi tânjesc” (McEwan, 2019: 17–18), „divinitatea mea”, dar și „mama haină” din basme cu care „relația mea amoroasă [...] nu merge cum trebuie” (*Ibidem*: 47) devine obiectul unei proiecții de seducție și supunere. Precum feciorul de împărat din *Tinerețe fără bătrânețe și viață fără de moarte* care plânge în pântecul mamei și refuză

să se nască dacă nu i se oferă un motiv serios, și acest făt declară răspicat că nu se naște decât pentru dragostea unei mame:

... dreptul meu este dreptul la dragostea unei mame și este unul absolut. Refuz să consimt la planurile ei de a mă abandona. Nu eu o să fiu surghiunit, ci ea. O s-o leg cu funia asta slinoasă, o s-o iau cu arcanul chiar de ziua mea cu o privire amețită de nou-născut, cu un singur urlet tânguitor, ca de pescăruș, care o să-i străpungă și o să-i captureze inima. Atunci, când această dragoste cu forța o va obliga prin contract să devină doica mea permanentă, iar libertatea ei nu va mai fi decât un țărnam natal tot mai îndepărtat, atunci Trudy va fi a mea, nu a lui Claude, și o să fie la fel de dispusă să mă lepede cât ar fi să-și smulgă sânii din cutia toracică și să-i arunce peste bord. Și eu pot să fiu hain (*Ibidem*: 59).

Cu această încărcătură psihanalitică, rescrierea lui McEwan lasă să plutească o mare întrebare și asupra motivației finale a personajului de acțiune. Chiar dacă pare să primeze componenta justițiară – „Ajunge. [...] A venit timpul să intru și eu în joc. Să pun capăt sfârșiturilor. A venit timpul să încep.” (*Ibidem*: 223) –, nu putem să nu vedem că acest fetus contemporan nouă alege ceea ce e mai bine pentru el. El nu eșuează sub spectrul complexului oedipian ca Hamletul shakespearian care, inconștient, se simte un criminal latent și, măcinat de acuze împotriva lui însuși și de scrupule morale, numai accidental înfăptuiește răzbunarea. Dimpotrivă, egocentric ca și adulții din jurul său (care nici măcar nu l-au numit și nu s-au interesat de sexul lui), își obține mama numai pentru sine după ce concurența celorlalți doi bărbați din viața ei a fost înlăturată. O mamă pe care, odată născut, o descoperă cu încântarea unui îndrăgostit și care reprezintă, pentru el, *totul*:

Mama mă mută, ca să putem schimba o privire lungă. Momentul pe care l-am așteptat atât. Tata avea dreptate: e un chip minunat. Părul e mai închis la culoare decât îmi închipuiam, ochii, de un verde mai deschis, obrații încă îmbujorați de efortul pe care tocmai l-a depus, nasul, cu adevărat mititel. Mi se pare că *în acest chip văd întreaga lume* [s.m.]. Frumos. Iubitor. Criminal (McEwan, 2019: 230).

Renegocierile de sens ale scriitorului britanic cu textului canonic se intarsiază mai cu seamă în reprezentarea unui Hamlet ofensiv, care își depășește dualitatea gândirii și, în dezbateră între „a fi sau a nu fi”, între ce e moral și ce e util, își afirmă frenetic instinctul vital și își revendică dreptul garantat prin naștere la „felia sa infinitezimală de timp etern și o șansă sigură de a avea o conștiință” (*Ibidem*: 153). Știe că există „viață după naștere”, că lumea nu e un mormânt și vrea să-i experimenteze diversitatea și neprevăzutul. Vrea să fie martorul vârstelor sale, vrea propriul său bildungsroman:

Nu de parcurile de distracții ale paradisului și infernului mă tem eu cel mai tare – de distracțiile cerești și de mulțimile diabolice – și aș putea chiar să

trăiesc cu ocară veșnicei anonimități. Nu mă deranjează nici să nu știu de care dintre ele voi avea parte. De ce mi-e mie frică e să nu ratez complet toată treaba. [...] Asta-i distracția mea preferată – Zidul Vieții. Vreau să mă dau și eu o dată pe el. Vreau să devin [s.a.] (*Ibidem*).

Cu aceasta revenim la individualism, la modelul mental și la agenda socială a omului secolului XXI. Dacă Hamletul shakespeareian percepea crima drept un simptom al declinului lumii, avatarul său, deși atât de conectat la criza contemporană a valorilor, vede în ea doar o dramă personală ce îi poate vicia parcursul unei vieți în care ar trebui să beneficieze de toate cuceririle civilizației. Se pare că individualismul rămâne soluția de existență într-o societate distopică, marcată de consumerism, populism, extremism, lăcomie, la fel de putredă ca Danemarca lui Hamlet. Și acest lucru – ne lasă Ian McEwan să înțelegem – nu e deloc condamnat. Dacă e să sintetizăm direcțiile ideologice ale cărții sale atunci cea subliniată în tușe îngroșate este critica societății noastre mileniale pentru care istoria crimei hamletiene nu e decât o metonimie. Se cer adăugate teme de meditație precum relația, visceral condiționată, a fiului cu mama, blestemul cunoașterii sau coruperea inocenței copiilor și deja sunt suficiente argumente pentru a identifica în romanul lui McEwan forța interogativă a capodoperelor.

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African American Spirituality: Icons of a Nation in Selected Novels by Zora Neale Hurston

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Abstract:

In our article we examine the deep connection between African American literature and spirituality, demonstrating how faith, folklore, and tradition have profoundly shaped both identity and cultural resilience. Beginning with slave narratives and spirituals, where the story of Moses and the Israelites inspired hope for freedom, we trace how African American writers used religion and folklore as tools of resistance and self-expression. Being both a novelist and an anthropologist, Zora Neale Hurston's novels are rich in cultural observation. Hurston's unique perspective, shaped by her upbringing and encounters with influential figures, set her apart from her contemporaries. Despite facing criticism for omitting overtly political themes, her work authentically captured the experiences of blacks in the South, providing a nuanced exploration of African American folklore and showcasing the complex nature of her literary legacy. The deliberate emphasis on Hurston's contributions deepens our understanding of African American spirituality, culture, and resilience within the broader societal context.

Keywords: African-American literature, spirituality, religion, folklore, anthropology, myths

Introduction

The richness and originality of African American literature have long fascinated both readers and scholars. This body of work – spanning fiction, poetry, and drama – draws on traditions and spiritual practices carried from Africa through the brutal triangular slave trade and transformed by the lived experiences of bondage, struggle, and emancipation. Spirituality, in particular, is central to understanding both the uniqueness and the universality of this essential strand of American literature. The first keyword in the title of our article is “spirituality”, a theme we trace through the works of key African American writers. This field is vast, ranging from the Negro spirituals that W.E.B. Du Bois memorably called “sorrow songs” in *The Souls of Black Folk* (1903), to the poetry of Langston Hughes and the novels of Zora Neale Hurston, Ralph Ellison, Alice Walker, and Toni Morrison. More than a subject for

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historians, sociologists, or literary critics, African American spirituality has been decisive in shaping American cultural identity itself.

Our article explores the intimate relationship between African-American writing and spirituality as a lasting manifestation of humanity. We searched for the roots of spirituality in the collective memory of the former slaves in North America who acquainted with the essential aspects of Christianity. Particularly moving and enlightening is the account of Gronniosaw, an African prince. During the Middle Passage, he watched the ship's captain open the Bible and read to the crew. Intrigued, Gronniosaw noticed where the Holy Bible was kept and opened it. To his disappointment, the book refused to speak to him. He felt a trace of sadness, thinking: "everyone and everything despised me because I was black" (2012: 19). Then the narrative shifts, highlighting the resistance of Africans taken into slavery, as, despite these oppressive circumstances, they learned to read and write in defiance of the rules, finding solace and unity as the books began to speak to them.

Over the years, Martin Luther King Jr., in his famous speech "I Have a Dream", reformulated the same hope for dignity and human rights: "I have a dream that one day every valley shall be exalted, every hill and mountain shall be made low, the rough places will be made plain, and the crooked places will be made straight, and the glory of the Lord shall be revealed, and all flesh shall see it together" (1963).

The second keyword in the title of our thesis is "icon", a term that we have used according to the definition given by the Merriam-Webster Online Dictionary: "a person or thing widely admired, especially for having great influence or significance in a particular sphere", in this case literature, even though an African American, if questioned, would provide different answers, including movie actors, singers, baseball, and football players. Spirituality shaped the icons of the nation, literary or otherwise. Throughout the works we looked at, we see the characters' clear search for identity, as well as the spiritual, religious, and folkloric elements that make them unique and memorable. Whether we read slave narratives like Harriet Jacobs's *Incidents in the Life of a Slave Girl* (1861) or Frederick Douglass's *Narrative* (1845), or novels with strong spiritual themes like Zora Neale Hurston's *Their Eyes Were Watching God* (1937) or James Baldwin's *Tell It on the Mountain* (1953), or look for African roots in Toni Morrison's *Beloved* (1987) or Alice Walker's *The Color Purple* (1982) – to name just a few – we can see a shared thread. These works have earned a lasting place in mainstream literature, showcasing an African American literary expression of the hopes and struggles of people marginalized by the white majority.

Riding the Damnation Train

Three decades after her death, *Their Eyes Were Watching God* has become a recognized classic in modern American literature, and Hurston's folklore collection *Mules and Men* is seen as a key text for African American cultural and literary studies. Ernest Hemingway wrote

a careful biography that reconstructs Zora Neale Hurston's fascinating life. Many monographs, essays, articles, and bibliographies have been written about her and her work. More importantly, her influence on African American literature continues to grow. Novelists, poets, and playwrights – including Michel Harper, Toni Morrison, Ishmael Reed, Ntozake Shange, George Wolfe, and Alice Walker – all refer to, reinterpret, and adapt Hurston's works.

Set in Alabama and Eatonville, *Jonah's Gourd Vine* (1934) shows, as Darwin Turner notes, "Miss Hurston revealed the same talents in her novels. The narrated tales, the credible, likable characters, and the colorful dialogue evoke tenderness and amusement. However, in the greater length of the novels, she showed weaknesses. She caricatured less important figures, exaggerated the language, and sacrificed structure for the sake of folktales" (Turner, 1971: 100).

Her identification with folk values, sensitivity to language nuances, and active imagination contribute to the narrative's vibrant impressions and dramatic appeal, distorting its characters, structure, and atmosphere. Using her father as a model for the anti-heroic protagonist and the Bible to give symbolic meaning to the plot, Hurston subordinates the story and character to the presentation of black folklore.

The narrative is divided into three unevenly stretched parts. The first part (chapters 1-16) traces the evolution of John Buddy Pearson from a life of poverty as an illiterate laborer to success as a deceitful preacher and trader-politician, with the help of his first wife. The second part (chapters 17-23) follows his fall from grace, orchestrated by his second wife (vengeful and practicing witchcraft) and an envious friend, while the third part (chapters 24-25) focuses on his redemption by a third (wealthy) wife and his death in a car accident after proving to be an incorrigible womanizer.

The biblical parable from the novel's title (Jonah 4:1-11) – an allusion to God as both creator and destroyer – emphasizes His mercy for the sinners of Nineveh. At the same time, the narrative highlights the judgment of Reverend Pearson for the wickedness he displayed. In a letter to James Weldon Johnson (16 April 1934), Hurston stated that her intention was for the protagonist to represent "the common run of us who love magnificence, beauty, poetry, and color so much that there can never be too much of it. Who does not feel that the ridiculous has been achieved when someone decorates a decoration?" However, John was to represent more than that: "I see a preacher as a man outside of his pulpit, and so far as I am concerned, he should be free to follow his bent as other men. He becomes the voice of the spirit when he ascends the rostrum" (Hurston, in Kaplan, 2003: 298). However, the novel fails to thoroughly analyze why this highly talented preacher-poet repeatedly violates the dictates of the spirit and misinterprets his metaphors. Lucy, John's wife, also fails to

achieve an identity between word and deed, even though she possesses the insight that is lacking in her husband. At one point, Lucy warns her daughter: “Don’t you love nobody better’n you do yo’self. Do, you’ll be dying befo’ yo’ time is out” (*Jonah’s Gourd Vine*, p. 130). Loving John too much, Lucy accepts her own demise. At the moment of death, she is on the verge of self-discovery.

The critical reception of the novel, even more than half a century after its publication, is truly astonishing. Karla Holloway (1993) notes that, through the title, the novel foreshadows its tragedy. Whose “vine”? John Pearson, as a mulatto, is not necessarily the “tragic, colored” character in this novel, but he is condemned through his association with the clinging plant and the empty fruit. John Pearson finds a conducive ground for his words: “O Lawd, heah’tis once mo’ and again yo’ weak and humble servant is knee-bent and body bowed – Mah heart beneath mah knees and mah knees in some lonesome valley cryin’ fuh mercy whilst mercy kinst be found” (*Jonah’s Gourd Vine*, p. 25). Although most of the novel is autobiographical, it presents other essential aspects. One is the examination of intra-community relationships in a predominantly black setting. White people only appear on the periphery. Hurston extols the values and culture of Black America, including language, religion, and social relationships, in Eatonville, her predominantly Black hometown, and its surroundings. John Pearson, perhaps the most accomplished portrayal of a black preacher in African American literature, is presented as an energetic preacher, a chosen one of God. However, the human dimension is not lacking; it is that of a man subject to the same impulses, weaknesses, and mistakes as ordinary people. The novel revolves around this tension between divine and human qualities.

John Pearson is akin to the biblical Jonah, who tried to escape from God and his responsibilities. At the novel’s beginning, John compromises by doing things that are more necessary than right, assuming an escape from problems and responsibility. John never learns to accept responsibility for his actions, and this non-acceptance leads to even more incredible difficulty in bearing the consequences.

A predominant feature of the novel is the presentation of the lives of the black people whom the author loved, knew, and appreciated so much. Zora Neale Hurston is not overly concerned with the relationship between blacks and whites in Eatonville, but rather with the dynamics of this African American community and how interpersonal relationships function within this group. The novel’s central metaphor is found in the famous “Sermon” by Lovelace, recorded by Hurston in 1929 and later published, ultimately included in her first novel. For better understanding, here is an excerpt from this sermon, where we find the metaphor of the “damnation train”:

I heard de whistle of de damnation train / Dat pulled out from Garden of Eden
loaded wid cargo goin to hell / Ran at break-neck speed all de way thru de law /
All de way thru de prophetic age / All de way thru de reign of kinds and
judges— / Plowed her way thru de Jordan / And on her way to Calvary when
she blew for de switch / Jesus stood out on her track like a rough-backed
mountain / And she threw her cow-catcher in His side and His blood ditched de
train, / He died for our sins.../That's where I got off this damnation train...
(*Jonah's Gourd Vine*: 180-181)

Eric Sundquist, analyzing Zora Neale Hurston's novels in close correlation with her work as a folklorist and an anthropologist, makes the following statement about the character John Pearson:

Despite his bardic cultural function, John's redemptive role is robbed of its mythic significance by the narrative life in which his sermon is inscribed. The elaborate trope of the 'damnation train,' whose cow-catcher pierces Jesus' side and releases his sacrificial blood in the Lovelace sermon, is reduced to a burlesque figure in the train that smashes into John's Cadillac after his last act of infidelity (in Gates and Appiah, 1993: 56).

The wide resonance of the train metaphor as an image of salvation for black people (in spirituals), its association with the movement and migration of black people, the symbolism (in work songs and blues) of the endless toil of black America – all these associations that Hurston invokes throughout the novel before concentrating them in the image of the judgment day train from the sermon – are diminished into the somewhat comic instrument of punishment.

In writing about preachers, Hurston also reflects on her own father, questioning his morality and the special authority given to male ministers in African American communities. She takes the familiar image of the preacher and brings it down to a human level, even if that risks seeming bold. *Jonah's Gourd Vine* is unusual in the way it deals with class conflict and the pull between religion and everyday life within a lively folk culture. However, *Their Eyes Were Watching God* (1937), widely seen as her greatest novel, stands as the true masterpiece of that culture. As both a novelist and a trained anthropologist, Hurston studied folklore with a scientific eye, but also with an artistic commitment. For Hurston, what mattered most was cultural truth and lived experience, not strict factual accuracy. That is why the line between the natural and the supernatural is so important in her work, where magical realism and folklore meet. Over the last twenty years, Hurston has become a significant subject of study, though some critics are suspicious of this renewed attention, as if people are rushing to make her an icon. After her death, she was embraced as a symbol of the civil rights and feminist movements, and today she is seen as one of the most important American writers of the 20th century, even surpassing many of her male peers.

The central role of *Their Eyes Were Watching God* reflects a literary approach to multiculturalism that sometimes overlooks history, class, and the perspectives of marginalized groups, instead favoring a more mythical or universal reading. Still, Hurston's novel includes real events and characters that must be acknowledged when recognizing her skill as an artist and thinker. The importance of *Their Eyes Were Watching God* comes from how it sets the protagonist's personal experiences against the historical context of post-Reconstruction Florida.

The novel's dramatic tension comes from the protagonist's attempts to follow her dreams as a country woman, with her light-skinned appearance, while dealing with the rules of a small, male-dominated bourgeois society that limits her chance for love and fulfillment. This tension continues until she meets Vergible Woods, known as "Tea Cake".

The protagonist's story, Janie, is the author's confession to her proud and self-aware black people, especially black women who achieve self-awareness through their own will. Written in just seven weeks while in Port-au-Prince, Haiti, the novel is partly the result of what Zora discovered while collecting folklore – "a peace I have not known anywhere else on earth". This inner peace allowed her to discern the meaning of African-American life as it unfolded in Eatonville.

The novel represents a culmination of her knowledge about people, her belief in folklore and rural life, and her convictions regarding women's rights to identity and self-definition. It expresses emancipation from the constraints of African-American rural life, even as it celebrates such a life. In Haiti, where the author herself confronted the end of a romantic relationship (meaning personal liberation and reconciliation of artistic career with personal emotions), through the evolution and maturity of the protagonist, she succeeded in revealing the multiple layers of oppression operating on women of color: "De nigger woman is de mule uh de world".

María Eugenia Coterá thinks that "Janie's life history... contextualizes her individual experiences as a multi-raced, heterosexual, middle-class (and later working-class) woman against the historical backdrop of post-Reconstruction Florida, a place of particular race, caste, class, and gender relations" (Coterá, 2008: 179). Janie Crawford realizes that in a world where only men have the right to sit on the porch and tell stories (about the exploited mule exhausted by the master). Wives are considered part of the property; male domination exists and operates in such a world. Janie goes through three consecutive marriages, but in this process, she gains the freedom to speak, express her feminine self, be independent of servitude, and accept her own life. Janie asserts herself because she possesses the courage and verbal skills to position herself differently from a relationship of dependence.

The protagonist's strength lies in recognizing the power of language and the ability to speak on her behalf. By writing this story of a heroine learning to love herself, Zora Neale Hurston balances the value and cost of full womanhood in a society ready to oppress based on race and gender, introducing a discourse on autonomy, possibilities, and feminine power.

On Men, Women, and Creation

The first sentences of *Their Eyes Were Watching God*, written during the era of racial segregation, highlight the differentiated relationship between men and women and the creation of great myths. The novel repeatedly employs metaphors related to the horizon, conveying profound symbolic meaning:

Ships at a distance have every man's wish on board. For some, they come in with the tide. For others, they sail forever on the horizon, never out of sight, never landing until the Watcher turns his eyes away in resignation, his dreams mocked to death by time. That is the life of men (*Their Eyes*: 1).

The men sail on who knows what sea, and the women, more pragmatically, return to the land to honor the funeral rites. Like a prophecy, one of these women stands out. As we approach it, we discover a magnificent creature, the object of all desires, disturbing, whose presence opens the voice to the voiceless. The narrator reflects on ships at a distance, representing the fulfillment of individual wishes. While some ships come in with the tide, others remain on the horizon, elusive and out of reach, a poignant depiction of life's uncertainties and unfulfilled dreams.

Dolan Hubbard suggests that in Hurston's novel, we see the deep and spiritual aspects of the human desire for transcendence and divine connection:

the classical Biblical picture of the looker standing before the horizon, pondering whether they will ever reach it. The observer perceives a scene encompassing both the temporal and the timeless, the finite and the infinite: The ships on the horizon are emblematic of the dreams of the person standing on shore. This timeless picture speaks of a person's desire to be related to God, the ultimate Other (2007: 37).

Zora Neale Hurston taps into the language of those marginalized within white American society, bringing their stories, struggles, and playful antics to light. Through a very complicated stylistic process, the narrative is intertwined with the past, and from the memory of the main heroine, Janie Mae Crawford, emerges the adventures of an enslaved population, which has become amnesiac of its African origins. Instead, the sinister landmarks of American literary doxa mark the novel: the dogs unleashed on the black man, the lynching of innocents, hatred, hunger, indecent housing, poverty, and incessant ostracism.

Janie's Journeys for Self-discovery

Janie's return to Eatonville frames the actual action of the novel and her telling her friend Phoeby about her adventure and her journey. The story begins beyond the threshold of this frame: Janie's long journey, lyrical and epic, personal, and historical, began long before, at the time of her childhood, in the "white people's back-yard" for which her ex-slave grandmother worked and then in a hut located on the edge of the forest and independent of the white people's property. Her grandmother explains: "And, Janie, maybe it was not much, but Ah done de best Ah kin by you. Ah raked and scraped and bought dis lil piece uh land so you wouldn't have to stay in de white folks' yard and tuck yo' head befo' other chillun at school" (*Their Eyes*, pp. 23-24). It marks the initial stage in Janie's extensive quest for independence from white culture.

Janie's journey takes her from the lonely farm of Logan Killicks to the all-Black town of Eatonville with Joe Starks, then to the Everglades, where she works alongside seasonal laborers, before finally circling back to Eatonville, where the novel both begins and ends. Seen in its historical and social context, her story unfolds like a triptych. The first part of her life reflects key moments in American history, stretching from slavery and the Civil War to emancipation and beyond. Here, Janie also comes into contact with the African American middle class, only to grow disillusioned with its values. This opening section shows life as it really is, with its mix of social contradictions, not as an abstract or mythical world but as one shaped by a clear historical and cultural identity. Hurston anchors this by placing Janie's grandmother, Logan Killicks, and Joe Starks firmly in that social setting. The grandmother's stories, told to convince Janie to marry Logan, draw directly on the tradition of "ex-slave narratives", bringing to life the legacy of slavery, war, and emancipation. For her grandmother, racial prejudice remained an unchanging reality no matter the time period: "Honey, de white man is de ruler of everything as fur as Ah been able tuh find out" (*Their Eyes*: 17).

The grandmother recognizes – long before modern feminism articulated it – that the Black woman is subjected to various forms of exploitation, clearly understanding her status as a victim:

Maybe it's some place way off in de ocean where de black man is in power, but we don't know nothin' but what we see. So de white man throw down de load and tell de nigger man tuh pick it up. He pick it up because he have to, but he don't tote it. He hand it to his womenfolks. *De nigger woman is de mule uh de world* so fur as Ah can see. Ah been prayin' fuh it tuh be different wid you. Lawd, Lawd, Lawd! (*Ibidem*, emphasis added).

For Janie's grandmother, Logan Killicks represents the safest way to protect her granddaughter from the "double slavery" that had marked the lives of women before her. Although Logan is much older,

and Janie feels only repulsion rather than love for him, she agrees to the marriage. Like many young women, Janie feels she owes a debt to the grandmother who raised her. By marrying Logan, she hopes to grant Nanny peace of mind – that Janie will be spared the physical and sexual violence suffered by earlier generations of women:

Tain't Logan Killicks Ah wants you to have, baby, it's protection... Ah ast de Lawd when you was uh infant in mah arms to let me stay here till you got grown. He done spared me to see de day. Mah daily prayer now is tuh let dese golden moments rolls on a few days longer till Ah see you safe in life (*Their Eyes*: 18).

The grandmother's words, her assurance that God has been on her side and that she will join Him peacefully and properly are deeply religious: "Ah ain't gittin' ole, honey. Ah'm done ole. One mornin' soon, now, de angel wid de sword is gointuh stop by here. De day and de hour is hid from me, but it won't be long" (*Ibidem*). There is a profound sense of African American spirituality, blending religious and poetic elements in the grandmother's words. Her assurance that God has been by her side and that she will peacefully join Him imparts spiritual confidence. Her almost poetic speech suggests a deep connection to the spiritual realm. There is a profound reflection on the complexities and expectations tied to relationships in this exchange between Janie and her grandmother, particularly for Black women viewed in the context of their societal roles. The grandmother's scolding underscores a practical, pragmatic perspective on marriage, emphasizing the security and respect of the union. The focus on "uh prop tuh lean on all yo' bawn days" (lifelong support) and "protection" shows a preference for stability and social recognition rather than romantic notions of love.

Expectations and Fulfillment

The grandmother is a spokesperson for petty bourgeois ideals of security through property and of ideals of femininity and status modeled on the white women she served. Sitting on rocking chairs, under the white porches of the manor houses, these images seem to her to be the essence of security. This vision of the world remains the gate, in forms and ideology if not in reality, to the social relations of the enslaved person in the South and is imposed without much subtlety on a new generation whose point of reference is instead the world of modern capitalism and the free market. If the figure of the grandmother takes us back to the history of slavery, the Civil War, and emancipation, Logan Killicks, and Joe Starks take us back to the democratic experiment of Reconstruction and its failure – as W.E.B. Du Bois claims – from opportunism, egoism, racism: But the ideal of "forty acres and a mule" – the just and reasonable ambition to own the land that the country had

solemnly promised the formerly enslaved people to fulfill – was destined in many cases to be bitterly disused.

Du Bois' name is associated with his concept of the "Talented Tenth" and with the urban intellectuals of the North from whom the African-American avant-garde was to emerge. In some respects, Killicks and Starks represent the "Talented Tenth" of the South, that is that exceptional minority who had become property owners, thanks to their parsimony rather than to the generosity of the government. Their properties against enormous obstacles; racism makes their capitalism a form of heroism that Hurston certainly recognizes while ruthlessly denouncing their sexism. Logan Killicks, a prototype of the rural version of the self-made man, personifies the ethic of work and self-doing and the ideal of economic autonomy, of capital formation based on property and savings, regardless of political rights and civilians. This rural African-American lower middle class found its leader and political voice in Booker T. Washington. Joe Starks, a more important figure in the novel, refers to a later moment: trade, speculation, and free economic initiative. Janie's romantic resourcefulness and Joe's economic resourcefulness converge in the Janie–Starks couple. Starks, who "spoke for far *horizon*" (*Their Eyes*: 34), reminds us of the urban and entrepreneurial petite bourgeoisie that, in the early twentieth century, found its conscience through the nationalist leader Marcus Garvey, the modern and urban interpreter of Booker T. Washington:

Been workin' for white folks all his life. Saved up some money – round three hundred dollars, yes indeed, right here in his pocket... He had always wanted to be a big voice, but the white folks had all the say-so where he came from and everywhere else, exceptin' this place dat colored folks was buildin' themselves. Dat was right too. De man dat built things oughta boss it. Let colored folks build things too if dey wants to crow over somethin' (*Their Eyes*: 33).

Joe Starks embodies the archetype of an entrepreneur, speculator, mayor, small capitalist, and shopkeeper, symbolizing the emerging South's inclination to "modernize" by adopting the ethics and model of the entrepreneurial bourgeoisie in the North. When Joe Starks arrives in Eatonville, he quickly brings about significant social, economic, and cultural change. He buys two hundred acres of land, pays in cash, and starts building roads, putting up street lamps, opening a shop, setting up a post office, and taking on a leadership role in the town's push for independence. However, even though Starks speaks with the voice of the new Black middle class, the way he shows his wealth and power – his big white house with columns, the polished brass spittoons, and his demand that Janie act like the white women of the old South – points back to the Southern aristocracy. These symbols make it clear how difficult it is to build genuine political autonomy while still being caught in old patterns

of power. Janie slowly realizes that even a marriage that once seemed full of promise has turned into another form of oppression and isolation: “She had been getting ready for her great journey to the horizons in search of people; it was important to all the world that she should find them and they find her” (*Their Eyes*: 106). The novel highlights the clash between personal dreams, social expectations, and the cultural limits of the time.

The Lost Horizon

With Starks’ illness and death, Janie sees that her grandmother’s material view of life, and the choices it led her to, were tragically wrong. In a moment of sharp break from the past, she denounces this failure in an inner monologue after his funeral:

Here Nanny had taken the biggest thing God ever made, the horizon – for no matter how far a person can go the horizon is still way beyond you – and pinched it in to such a little bit of a thing that she could tie it about her granddaughter’s neck tight enough to choke her. She hated the old woman who had twisted her so in the name of love (*Their Eyes*: 107).

Here, Zora Neale Hurston underlines a key moment in the protagonist’s character development and self-realization. Joe Starks becomes a turning point for Janie as she begins to reassess her life and the choices dictated by her grandmother’s economic conception. The mention of the “biggest thing God ever made, the horizon”, symbolizes limitless possibilities, freedom, and potential in life. Janie feels a deep disappointment in her grandmother, who limited her potential and ambitions in the name of what she thought was love. The image of “pinching the horizon” into something small enough to tie around Janie’s neck captures how Nanny’s choices turned the vast possibilities of life into restrictions that left Janie feeling choked. The horizon, with its suggestion of limitless experience, becomes a powerful symbol of the freedom denied to her. In her internal monologue after Joe Starks’ funeral, Janie gives closure to this chapter of her life, using harsh words to condemn the woman who had twisted her in love’s name. This moment marks a turning point: Janie begins to grasp the meaning of her own desires and aspirations, and to see clearly how social expectations and old ideas of love have shaped – and confined – her search for self-discovery.

It marks a moment of liberation as Janie confronts the constraints imposed on her and starts to seek a more authentic and fulfilling path for herself. Later, as she prepares to leave with Tea Cake, Janie explains to Phoeby:

She was borned in slavery time when folks, dat is black folks, didn’t sit down anytime dey felt lak it. So sittin’ on porches lak de white madam looked lak uh mighty fine thing tuh her. Dat’s whut she wanted for me – don’t keer whut it cost. Git up on uh high chair and sit dere. She didn’t have time tuh think whut tuh do after you got up on de stool uh do nothin’. De object wuz tuh git dere. So

Ah got up on de high stool lak she told me, but Pheoby, Ah done nearly languished tuh death up dere. Ah felt like de world wuz cryin' extry and Ah ain't read de common news yet (*Their Eyes*: 134-135).



There is a sense of alienation that Janie experiences as she grapples with her grandmother's expectations and societal norms. The mention of Grandma being born during slavery sets the historical context, emphasizing the deeply ingrained restrictions placed on black individuals during that era. Grandmother's urging Janie to sit on a particular chair is a seemingly simple action loaded with significance, symbolizing a level of freedom and equality denied to black people at that time.

Grandma's desire for Janie to sit on the porch like a white mistress reflects her aspirations for Janie to attain a status that was traditionally denied to black individuals. The emphasis on the unique chair and the command to stay there implies the rigidity and constraints associated with societal expectations. A desire for social advancement drives Grandma's ambitions for Janie, but the means to achieve this come at the cost of Janie's well-being and freedom.

Janie's expression, "I almost died up there", conveys the profound emotional toll of conforming to societal expectations that alienate her from her authentic self. Sitting on the porch becomes a metaphor for the limitations and stifling expectations placed on Janie, hindering her ability to engage with life authentically and think about her desires and aspirations. The passage captures the internal conflict between societal pressures and individual identity, highlighting the emotional strain and alienation from pursuing societal ideals that do not align with personal fulfillment.

Through Janie's words, Hurston captures the spirit of a generation striving for autonomy, authenticity, and creative expression that transcends the societal expectations and limitations imposed by history and class. It serves as a literary and cultural manifesto, marking a new chapter in the narrative of African American identity and artistic endeavor during this transformative period in American history.

Nature and People

After enduring wasted potential and a stifled childhood, along with a series of marriages, disunions, and disillusionments, Janie faces the challenging journey to reclaim a fragment of her untarnished inner treasure. At this juncture, she experiences love. Janie's third journey takes her to the Everglades, an area that attracts thousands of displaced people, providing them with a place to survive and enjoy life, dance, and have fun. The Everglades feel almost like an Eden in Florida – wild, lush, and untamed – where Janie experiences her most passionate love. Life there is described in vivid, creative, almost allegorical language, full of

playful conversations and slips of the tongue that show both the strength and the struggles of a marginalized community.

However, poverty brings prejudice, and even here skin color divides people, creating a painful form of self-debasement within the African American community, a “dose of negritude”. But nature soon proves stronger than human divisions. A looming hurricane, first noticed by the Seminole Indians and foreshadowed by fleeing animals, shows the immense power of Lake Okeechobee. In its destructive force, the lake becomes like the Last Judgment, sweeping away all differences and affecting everyone in its path.

For Janie, the Everglades reflect the spirit of 19th-century Romanticism: just as English poets once looked to Mediterranean landscapes to escape an alienating society, Janie looks to the deep South and its agricultural workers for a world of freedom and passion – only to find that the power of nature always shadows it.

Nature is generous, and the free proletariat of the Everglades joins in, offering her an experience of renewal. Here, through romantic love with Tea Cake, Janie challenges conventions and breaks the taboos that control social, racial, and sexual relations in bourgeois society: wealthy and light-skinned, she marries a much younger, dark-skinned man; she learns to play chess to shoot, to work in the fields, and she becomes a participant in the popular culture from which Starks had categorically excluded her.

In the Everglades, Janie finds a reconnection with the harmonious relationship with nature that characterized her childhood. The Everglades are shown as vast, fertile, generous, and free. The narrator describes them in a way that feels more like ethnography than Janie’s own voice, highlighting the novel’s interest in different ways of seeing nature. For Janie, the Everglades become the setting for rediscovering a raw and unbound connection with the natural world, free from the limiting views of her grandmother and former husbands. Here, nature is not reduced to property or abstract symbols but is experienced as abundance, freedom, and fertility. However, the same landscape that seems maternal and life-giving also reveals a darker side during the hurricane and flood, when it becomes wild, irrational, primitive, and cruel:

The monstropolous beast had left his bed. The two hundred miles an hour wind had loosed his chains. He seized hold of his dikes and ran forward until he met the quarters; ... The sea was walking the earth with a heavy heel... The lake was coming on. Slower and broader, but coming. It had trampled on most of its supporting wall and lowered its front by spreading. But, it came muttering and grumbling onward like a tired mammoth just the same. (*Their Eyes*: 178-190).

The men who had placed their trust in the white master and the divine master now find themselves peering into the darkness: “The time

was past for asking the white folks what to look for through that door. Six eyes were questioning God.... They seemed to be staring at the dark, but their eyes were watching God” (*Their Eyes*: 186-187). The lesson that the anthropologist Hurston teaches is that the white color and the white man – culture – are perceived as divinity – supernatural – at the same time that nature is ignored. Rather than observe the signs of nature, Tea Cake and others observe the whites first and follow their example; immediately afterward, they look at the horizon – like the male choir of Eatonville with which the novel opens – and see “God”. As anthropologist Hurston comments,

All gods who receive homage are cruel. All gods dispense suffering without reason. Otherwise, they would not be worshipped. Through indiscriminate suffering, men know fear is the most divine emotion. It is the stones for altars and the beginning of wisdom. Half gods are worshipped in wine and flowers. Real gods require blood (*Their Eyes*: 170).

Janie’s trial signifies a return to civil society, institutions, and historical realities – specifically, the racism embedded in the courts during that particular period and location. This trial serves as a reflection of Janie’s initial return to Eatonville, with both instances encapsulating her isolation, alienation, and misunderstanding by both the black laborers present at the trial and the inhabitants of Eatonville gathered around the shop.

In the first group, the laborers find Janie guilty. However, racial biases and Jim Crow laws, which bar African Americans from serving on the jury, prevent them from issuing a legal verdict. Similarly, the second group – the Eatonville choir – acts as a behavioral jury and declares Janie guilty. They, too, sit in judgment as Janie narrates her life story to Phoeby, the last connection between Janie and society. Beyond the novel’s conclusion, Phoeby conveys the meaning of Janie’s experiences to the “all dem sitters-and-talkers” (*Their Eyes*: 170) of Eatonville. Janie’s isolation and misunderstanding are mirrored in both the Everglades trial and the Eatonville gathering. It is an event that underlines the challenges of societal judgment and racism.

Contrary to the reader’s expectation of having read a rebirth novel with a happy ending, the novel’s conclusion portrays Janie as a woman who has returned home but has not, indeed, found a place within society among men and women. Using hieratic gestures, Janie symbolically isolates herself from society and retreats, figuratively burying herself within her house, which takes on the metaphorical characteristics of a tomb. Janie’s action is a final gesture of desperation. In closing, as in the philosophical assumptions of the novel, Hurston belongs to the modernist literature of the early 20th century, which often represents isolated and alienated artists who, from a literal or symbolic underground, curse society and its hypocrisies.

Modeled on that of other Romantic precursors, Janie's journey leads to the discovery that the Romantic ideals espoused by the artists of the Harlem Renaissance and American modernism cannot be sustained. The impulse to abandon society and find oneself in popular culture and primitive nature leads, for an African-American intellectual, to forms of physical destruction and spiritual alienation even more severe than those encountered in bourgeois society.

Their Eyes Were Watching God is a novel in which the criticism of dominant social and artistic practices results in the most desperate pessimism rather than a new conception of the world, art, and the relationship between art and society. Janie's journey in search of meaning and wholeness fails. In closing, as in the philosophical assumptions of the novel, Hurston belongs to the modernist literature of the early 20th century, which often represents isolated and alienated artists who, from a literal or symbolic underground, curse society and its hypocrisies.

Conclusions

Underlining the dynamics of collaboration and competition between publications during this transformative era has been paramount. It emphasizes how African American women writers challenged stereotypes and depicted diverse experiences. Expanding perspectives is necessary to fully comprehend the unique issues women face, often overlooked in African American history. Exploring spirituality during this period becomes essential, particularly in understanding the experiences of black women who found solace and identity through spiritual practices influenced by traditional African spirituality and Christianity. The significant roles played by black women in religious and community leadership during this transformative era are noted, contributing significantly to the broader narrative of the period.

Moreover, our analysis asserts that Hurston's exploration of African American religious syncretism within the anthology, documenting the blend of beliefs and practices within the community, sheds valuable light on the authenticity and resilience of these traditions. Her documentation of how individuals and communities navigated adversity while staying connected to their cultural and spiritual roots renders her work invaluable for scholars and readers seeking profound insights into the intricacies of the African American experience. We underscore the enduring impact of Hurston's contributions in shaping narratives of African American spirituality and cultural resilience.

Their Eyes Were Watching God has long been regarded as a nuanced exploration of race, class, and gender in post-Reconstruction Florida. The protagonist, Janie Crawford, embarks on a transformative journey, navigating societal constraints dominated by men to assert her identity and independence. The novel critically examines African

American rural life, unraveling layers of oppression experienced by women of color and critiquing the limitations imposed by society.

We contend that Hurston skillfully dissects the complex dynamics between men and women, interweaving the creation of great myths into the narrative. Metaphors related to the horizon imbue profound symbolic meaning, portraying life's uncertainties and unfulfilled dreams for men. The novel explores the concepts of male creativity and God's power, emphasizing the pivotal role of imagination and creative vision in fostering agency and power. Additionally, it illuminates the stories and struggles of marginalized individuals within white American society, reflecting the experiences of an enslaved population severed from its African origins.

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The Catholic Imagination in the Postmodern Condition: Narrative as Sacrament in Andrew Greeley's Fiction

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Abstract:

This study reexamines the fiction of Andrew M. Greeley through the lens of postmodern literary theory. While Greeley has been popularly regarded as a clerical storyteller or dismissed as a writer of popular Catholic melodrama, little sustained scholarship has positioned his work within the discourse of postmodernism. Addressing this critical gap, this study argues that Greeley's novels, spanning clerical sagas (*The Cardinal Sins* 1981; *Thy Brother's Wife*, 1982), science fiction (*The Final Planet*, 1987), and the *Nuala Anne McGrail* mystery series (1994-2009), exhibit defining features of postmodern literature. This study employs close textual analysis informed by key postmodern theorists: Lyotard's incredulity toward metanarratives, Hutcheon's poetics of parody and historiographic metafiction, and Jameson's cultural logic of capitalism. Also, the analysis is supplemented by theological insights from Tracy, Kearney, and Greeley's own *The Catholic Imagination* (2000). Comparative readings demonstrate how Greeley destabilizes clerical and ecclesial grand narratives, hybridizes popular genres, commodifies faith through mass-market fiction, and engages in intertextual and metafictional play, while simultaneously sacralizing the fragment through a distinct Catholic imagination. The findings establish Greeley as a postmodern novelist whose fiction integrates theological vision with aesthetic strategies typically associated with secular postmodernism. This reframes his literary significance: rather than marginal popular entertainment, his novels participate in the broader cultural negotiation of faith, pluralism, and irony.

Keywords: Andrew M. Greeley, postmodernism, Catholic imagination, historiographic metafiction, theology and literature

Introduction

Andrew M. Greeley (1928-2013) occupies a curious and contested position in American letters. Ordained as a Catholic priest in 1954 and widely recognized as a prolific sociologist of religion, Greeley simultaneously carved out a second career as a bestselling novelist, publishing more than 60 works of fiction between 1978 and 2010 (Greeley, 2006, p. 3). His novels, which

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include sweeping clerical sagas such as *The Cardinal Sins* (1981) and *Thy Brother's Wife* (1982), speculative works like *The Final Planet* (1987), and the lighthearted but layered *Nuala Anne McGrail* mystery series (1994-2009), achieved considerable commercial success.

Despite this popularity, Greeley's fiction has been largely marginalized in serious literary criticism. Reviewers frequently dismissed his novels as religious romances or "clerical soap operas" that catered to a mass-market readership. Critics tended to value his sociological and theological writings – especially *The Catholic Imagination* (2000) – while relegating his fiction to the peripheries of both American Catholic literature and post-Vatican II cultural studies. This bifurcation has obscured a crucial critical question: what if Greeley's fiction, when read with the tools of postmodern literary theory, discloses an aesthetic and theological sophistication overlooked by his detractors?

This study challenges that Greeley's novels embody defining features of postmodern narrative: incredulity toward metanarratives (Lyotard, 1984), parody and historiographic metafiction (Hutcheon, 2002), and the commodification and cultural logic of late capitalism (Jameson, 1991). While critics such as David Tracy (1981) and Charles Taylor (2007) have argued for the continued vitality of religious imagination within pluralist and secular contexts, Greeley's fiction provides a narrative enactment of these theoretical claims. His works destabilize the institutional Catholic "grand narrative", hybridize popular genres, sacralize the fragmentary, and engage in playful intertextuality.

Two stakes motivate this rereading. First, it revises the conventional assumption that Catholic fiction in the post-Vatican II era remained locked within realism or didactic moralism. Instead, Greeley's novels show that Catholic imagination can thrive through postmodern strategies such as irony, hybridity, and intertextual play. Second, it expands the study of postmodernism, which has often privileged secular or avowedly anti-religious figures such as Thomas Pynchon, John Barth, or Umberto Eco, by considering a Catholic priest's contribution to postmodern cultural production.

The study proceeds in four stages. First, it establishes a theoretical framework drawing on Lyotard, Hutcheon, and Jameson, as well as theological interlocutors such as Tracy, Richard Kearney, and Greeley himself. Second, it situates *The Catholic Imagination* (2000) as a theoretical key for interpreting Greeley's fiction. Third, it offers close readings of *The Cardinal Sins*, *Thy Brother's Wife*, *The Final Planet*, and the *McGrail* mystery series, showing how each enacts postmodern strategies. Finally, it reflects on the implications of naming Greeley as a postmodern Catholic novelist, thereby reframing his position within both literary and theological studies.

Theoretical Framework

Postmodernism and the Incredulity Toward Metanarratives

Jean-François Lyotard's *The Postmodern Condition* remains the canonical entry point for theorizing postmodernism. Commissioned as a report on knowledge, Lyotard defines the postmodern as "incredulity toward metanarratives" (1984: xxiv). By this, he refers to the collapse of legitimating "grand narratives" of modernity – progress, emancipation, Enlightenment reason, and even the scientific ideal of objective truth. For Lyotard, the postmodern moment is marked by a proliferation of "language games", localized discourses and small stories that resist subsumption into a single unifying narrative (40-41).

Applied to literature, this skepticism translates into narratives that foreground fragmentation, reject teleological closure, and dramatize the instability of meaning. Greeley's fiction resonates strongly with this framework. *The Cardinal Sins* (1981) and *Thy Brother's Wife* (1982) dramatize the breakdown of Catholic clerical authority, exposing ambition, desire, and hypocrisy where the Church's institutional discourse claims coherence and sanctity. Instead of affirming a stable priestly identity, Greeley's clerical protagonists embody fractured subjectivities that destabilize the metanarrative of the priesthood itself. In Lyotard's terms, Greeley invites "paralogy", i.e. new moves within language games that resist systematization (1984: 60).

From a theological angle, David Tracy's *The Analogical Imagination* argues that pluralism defines modern religious culture: "the Christian theologian must live with a multiplicity of classics and a plurality of publics" (1981: 410). Tracy's insistence on analogy – the recognition that the divine can be refracted through multiple symbols, narratives, and traditions – provides a theological corollary to Lyotard's incredulity toward metanarratives. Read together, Lyotard and Tracy illuminate how Greeley dismantles clerical grand narratives while sustaining a sacramental sense of meaning through fragments, symbols, and stories.

Pastiche, Parody, and Historiographic Metafiction

Linda Hutcheon's interventions are indispensable for recognizing postmodern narrative strategies. In *A Poetics of Postmodernism* (1988), she identifies irony, parody, and self-reflexivity as central techniques that unsettle the authority of traditional forms. Particularly influential is her concept of "historiographic metafiction", defined as novels that both narrate history and problematize its status as representation: "they install and then blur the line between fiction and history" (1988: 113).

Greeley's *Nuala Anne McGrail series* exemplifies this aesthetic. In *Irish Gold* (1994), Nuala's mystical visions reveal forgotten episodes of Irish nationalist struggle, while Dermot's narrative voice reflects ironically on the process of reconstructing and retelling those histories.

The interplay between visionary fragments and contemporary detective work foregrounds the constructedness of both historical knowledge and narrative authority. As Hutcheon observes, such texts both “use and abuse” history (1988: 23): they tell stories of the past but constantly destabilize their own claims to truth.

Beyond historiography, Hutcheon identifies parody as central to postmodern play. Unlike modernist parody, which was often satirical or corrective, postmodern parody is a form of “repetition with critical difference” (1985: 32). Greeley parodies clerical discourse in *The Cardinal Sins*, juxtaposing solemn theological language with sensual, even scandalous, descriptions of priests’ sexual entanglements. Rather than dismissing the sacred, this parody opens it up to ambiguity, irony, and revaluation.

Genre hybridity also falls under Hutcheon’s rubric. Greeley fuses romance, mystery, science fiction, and theological speculation, producing texts that refuse singular classification. Such hybridity exemplifies what Hutcheon later called postmodernism’s complicitous critique (1989), i.e. it participates in popular forms while simultaneously destabilizing them. In this sense, Greeley’s novels perform a Catholic inflection of Hutcheon’s historiographic metafiction and parody.

Postmodernism as the Cultural Logic of Late Capitalism

Fredric Jameson extends the discussion by interpreting postmodernism as “the cultural logic of late capitalism” (1991: 1). For Jameson, postmodern culture is characterized by depthlessness, pastiche, and the waning of historicity. He sees the proliferation of stylistic borrowing, nostalgia, and commodification as aesthetic symptoms of global consumer capitalism (35-36).

Greeley’s fiction fits squarely within this frame. His novels were packaged as mass-market bestsellers, often marketed with sensational cover art and provocative blurbs. The very fact that a Catholic priest’s theological imagination was mediated through popular genres like romance, mystery, and science fiction underscores Jameson’s point: even religious discourse becomes commodified under late capitalism. Yet, as Jameson admits, postmodern texts can also contain “critical negativity” within their complicity (1991: 49).

In Greeley’s case, commodification coexists with sacramental vision. The packaging of *The Cardinal Sins* as a scandalous clerical exposé lures readers into a story that, beneath its melodrama, meditates on grace, failure, and vocation. The *McGrail* mysteries’ playful Irish branding masks a deeper engagement with forgotten traumas of famine and revolution. Greeley’s work thus dramatizes what William Cavanaugh calls the “theopolitical imagination” of consumer culture, where liturgy and spectacle interpenetrate (1999: 1-5).

By situating Greeley within Jameson's cultural logic, we can see how his fiction negotiates the paradox of faith in a commodified world: theology smuggled into mass entertainment, sacrality refracted through market forms. Rather than disqualifying him as "merely popular", this very tension marks his fiction as quintessentially postmodern.

The Catholic Imagination as Theological Aesthetic

Finally, any theoretical framework for Greeley must account for his own contribution in *The Catholic Imagination* (2000). Here, he argues that Catholic culture is shaped by a "sacramental imagination" – the conviction that God is mediated through the material, the symbolic, and the aesthetic. "The Catholic imagination", Greeley writes, "sees created reality as a sacrament, a revelation of the presence of God" (2000: 1).

This vision resonates with postmodern aesthetics in striking ways. Like postmodernism, Catholic imagination resists rigid binaries – sacred/profane, natural/supernatural, high/low. Like Hutcheon's parody and Lyotard's paralogy, it thrives on plurality, symbol, and play. Yet unlike a secular postmodernism that often revels in fragmentation without transcendence, Greeley sacralizes the fragment: every shard of narrative, every symbol or vision, can refract divine presence.

The Catholic imagination thus becomes both theme and method in Greeley's fiction. His novels hybridize popular genres not simply to entertain but to enact sacramental vision within the late capitalist marketplace. In this sense, Greeley embodies what Richard Kearney calls a "hermeneutics of religion" – an openness to God through narrative, imagination, and otherness (2001: 4-5). By embedding sacramentality within postmodern strategies, Greeley discloses how theology and literature can mutually illuminate one another in a pluralist, commodified age.

Discussion

The Cardinal Sins (1981): Fragmented Priesthood and the Collapse of Metanarrative

Andrew Greeley's *The Cardinal Sins* opens with the intertwined lives of Kevin Brennan and Patrick Donahue, two seminary classmates whose paths diverge dramatically. Kevin is an intellectual and pastoral figure, striving toward integrity, while Patrick pursues ambition and political advancement within the Church. The novel dramatizes the disjunction between priestly vocation and clerical power, exposing the fissures beneath Catholicism's grand narrative of a holy, unified clergy. Through its character studies, narrative structure, and even its reception, the novel employs a postmodern aesthetic to deconstruct institutional myths and paradoxically affirm a sacramental vision grounded in human fallibility.

On a narrative level, the text resists teleological closure, rejecting a simple redemptive arc. Kevin's life is marked by unresolved tensions – between fidelity and temptation, intellectual rigor and emotional

vulnerability. Patrick's ascent to the rank of cardinal is consistently undercut by his moral corruption and profound personal emptiness. In Lyotard's terms, the modern "metanarrative" of priestly sanctity and institutional infallibility is destabilized, replaced by fragmented and localized stories of human fallibility. Greeley dramatizes what Lyotard calls "the heterogeneity of language games" (1984: 10): the discourses of theology, bureaucratic politics, and erotic desire collide within the lives of the characters, yet they are incommensurable and incapable of achieving a synthesized reconciliation.

Stylistically, Greeley deploys what Hutcheon terms parody as "repetition with critical difference". This is not mockery but a formal recycling that subverts the original's intention. The parody here is destabilizing: it acknowledges the lingering power of liturgical discourse while simultaneously critiquing its corruption by institutional politics and individual sin.

Jameson's notion of commodification provides a crucial lens for understanding the novel's cultural context and double function. *The Cardinal Sins* was aggressively marketed as a sensational scandal novel, its cover blurbs and promotional copy promising readers a revelatory exposé of "forbidden love" and "ecclesial intrigue". Yet, beneath this sensational packaging – a product of the late capitalist market – the narrative itself dwells on complex themes of grace, failure, and redemption in ways that exceed its commodified shell. The text thus simultaneously participates in the logic of the market and resists it, a duplicity that exemplifies Jameson's claim that postmodern cultural products can both express and implicitly critique the cultural logic of late capitalism.

Ultimately, David Tracy's concept of the "analogical imagination" clarifies Greeley's deeper theological project. For Tracy, this imagination seeks God "in, with, and under" the complexities and ambiguities of human experience (1981: 410). This is precisely Greeley's method. The novel does not end with a triumphant restoration of order but lingers in the fragments of compromised lives. In doing so, it discloses a sacramental possibility that divine grace is not reserved for the pure but is mediated precisely through failure and ambiguity. Kevin Brennan's loves, though fraught and imperfect, become fractured symbols of this grace. *The Cardinal Sins* ultimately uses the tools of postmodern critique – the dismantling of metanarratives, parodic repetition, and an acknowledgment of commodification – not to nihilistic ends, but to advance a robustly Catholic argument: that the sacred manifests itself most powerfully within the flawed and the human.

Thy Brother's Wife (1982): Erotic Desire, Sacramental Imagination, and Parody

Andrew Greeley's *Thy Brother's Wife* intensifies the critique of clerical culture begun in *The Cardinal Sins* by intertwining erotic desire and religious vocation in a scandalous yet theologically profound

narrative. The novel follows Father Sean Cronin, a man whose priestly vocation becomes entangled in a forbidden love affair with his brother's wife. The title itself, echoing the biblical prohibition in Leviticus 18:16, signals a narrative that deliberately stages transgression within a sacred frame, using the tension between divine law and human passion to explore the nature of grace.

From a postmodern perspective, Hutcheon's model of parody is unmistakable here. Greeley takes the traditionally sacrosanct trope of priestly celibacy – a cornerstone of Catholic narrative – and reworks it into a site of intense irony and ambivalence. In pivotal scenes, the sacred and the erotic are juxtaposed, such as when Sean reflects on his illicit attraction while reciting the Divine Office. This is not a simple rejection of tradition but a quintessential postmodern gesture: a repetition of Catholic forms infused with critical difference, forcing a re-examination of their meaning and cost.

Through a Lyotardian lens, the novel functions to undermine the “grand narrative” of clerical celibacy as an unambiguous and universally applicable sign of holiness. Lyotard's concept of the disintegration of metanarratives into localized “language games” is vividly staged in Sean's fractured consciousness. Celibacy ceases to be a sacred absolute and becomes one contested discourse among many – including those of scriptural law, canon law, human desire, and pastoral compassion – with no single discourse possessing totalizing authority in his crisis.

Yet, in a characteristically Greeleyan move, the novel refuses the nihilism this deconstruction might suggest. Instead, it embodies what David Tracy calls the “analogical imagination”, which seeks to find God “in, with, and under” the complexities and ambiguities of human experience (1981: 410). Sean's moral failure does not become a narrative of damnation but a paradoxically graced redefinition of vocation itself – not as a state of achieved perfection, but as a fractured openness to a divine presence that works through human weakness and desire. The erotic, in this view, is not the antithesis of the sacred but a potential locus for its disclosure.

Finally, the novel's own popular reception becomes part of its postmodern critique. As Jameson's work suggests, late capitalism commodifies everything, including the sacred. *Thy Brother's Wife* was a massive bestseller, marketed and consumed as a sensational “priest scandal” novel, its cover often placing it in the same commercial category as the steamy potboilers of Jackie Collins. Yet, Greeley can be seen to subvert this very mechanism of commodification. He uses the market's appetite for scandal as a vehicle for a serious sacramental imagination, turning a plot of illicit eros into an occasion to explore the most disruptive and forgiving forms of divine grace.

Thus, *Thy Brother's Wife* stands as a prime example of a postmodern Catholic aesthetic. It employs parody to critique tradition, uses narrative to destabilize metanarratives, and is itself commodified by the cultural marketplace. Yet, through it all, it remains stubbornly sacramental, insisting on the possibility of finding the trace of God even in the most forbidden and fractured forms of human love.

The Final Planet (1987): Science Fiction, Sacramentality, and Postmodern Genre Play

While Father Andrew M. Greeley is often remembered for his scandalous parish novels, his science fiction work *The Final Planet* reveals his postmodern theological hybridity at its most explicit. The novel narrates the journey of the pilgrim starship Iona, carrying the Holy Order of St. Brigid and St. Brendan on a quest for a new home. Their mission is governed by a strict ethical rule: they must receive an invitation to land. This premise sets the stage for an encounter with the alien civilization of Zylong, a world grappling with its own internal collapse, allowing Greeley to use the science fiction genre to explore profound theological questions of incarnation, grace, and redemption.

From Hutcheon's standpoint, this is a paradigmatic case of postmodern genre hybridity. The novel fuses classic science fiction tropes – a generation ship, first contact, a failing society – with deep theological speculation. As Hutcheon argues, postmodern texts often “use and abuse” genre conventions (1988: 3). Greeley uses the SF quest narrative for its propulsive energy but abuses or subverts it by making the goal not conquest but invited communion, and the resolution not technological but sacramental. He deploys the genre's framework only to destabilize it with theological reflection.

This subversion is most striking in the novel's depiction of alien liturgy. In a key scene, Zylongi rituals employing symbols of light and water powerfully evoke Christian sacramental imagery. Here, Greeley enacts his “Catholic imagination” directly: the alien ritual becomes a legitimate sign of grace, refracted through cultural otherness. This scene is a narrative performance of what Kearney terms a “hermeneutics of religion” – an openness to the divine ‘in, with, and under’ the encounter with otherness (2001: 4). For Greeley, God's revelation is not confined to a single tradition but can be disclosed through the sacred practices of another species.

This pluralizing impulse resonates with Lyotard's postmodern framework. The novel inherently resists the metanarrative of human exceptionalism and colonial conquest. Instead, Greeley champions what Lyotard would call paralogy, i.e. the creation of new, incommensurable language games that cannot be subsumed under a universal system. By suggesting that salvation may be disclosed through Zylongi ritual no less than through Christian liturgy, Greeley posits a new move in the language

game of theology, one that disrupts totalizing claims and embraces a plurality of narratives.

Furthermore, the novel exemplifies Jameson's assertion that science fiction is a privileged genre for "cognitive mapping", rendering the totalizing system of the present visible by imagining its logical extreme (1991). Greeley leverages the speculative register to stage a confrontation between two decaying rationalist systems: the worn-out utilitarianism of the pilgrim ship Iona and the critically dysfunctional, irrational rationalism of the Zylongi, who deny the existence of their own repressed kin, the Hordi. Both systems are stand-ins for a disenchanted modernity. Greeley thus uses SF's world-building power to map a systemic critique, theologizing the postmodern condition by imagining grace and redemption emerging not from human logic, but from the "absolute otherness" of the planet's own hidden spiritual reality.

Thus, *The Final Planet* demonstrates that Greeley's engagement with postmodern aesthetics extends beyond scandal and parody into the realm of speculative sacramentality. The novel is a profound thought experiment in which theology is refracted through the imaginative play of genre, arguing that in a pluralistic, postmodern universe, grace is ever-present, emerging from the most unexpected encounters and inviting a hermeneutics of open, hopeful response.

***The Nuala Anne McGrail Mysteries (1994–2005):
Historiographic Metafiction and Popular Catholicism***

Perhaps Greeley's most sustained literary project is the *Nuala Anne McGrail series*, beginning with *Irish Gold* (1994). These mysteries follow Nuala, a singer and visionary, and her husband Dermot, as they solve crimes by recovering forgotten fragments of Irish and Irish-American history.

Hutcheon's concept of historiographic metafiction provides the clearest lens. In *Irish Gold*, Nuala's psychic visions of the Irish Revolution interweave with Dermot's contemporary detective work in Dublin. History is simultaneously narrated and problematized: the text stages history as a set of competing narratives – official accounts versus personal and political secrets – mediated by vision, story, and memory. The series exemplifies Hutcheon's claim that postmodern fiction "acknowledges its own textuality even as it re-engages history" (1988: 125).

Lyotard's "little narratives" also find expression here. Instead of affirming nationalist or colonialist metanarratives, Greeley's mysteries disclose forgotten, localized stories – of rebels, ordinary citizens, and immigrants – whose fragments resist subsumption into any triumphalist account. The novels dramatize paralogy by multiplying historical discourses, none of which claims totalizing truth.

Jameson's cultural logic again contextualizes the series. The McGrail novels were marketed as cozy mysteries, their covers featuring

Celtic fonts and shamrock motifs. Yet within their commodified packaging, they function as theological-political interventions, recovering marginalized histories of trauma and faith. This tension embodies Jameson's dialectic: the novels are products of the market but carry a counter-discursive force within their very popularity.

Finally, the McGrail mysteries embody the Catholic imagination in popular form. Nuala's visions – ambiguous, fragmentary, and unverified – are nonetheless treated as sacramental signs, mediating grace through story. As Tracy insists, the analogical imagination finds God “through the classic, the symbol, the fragment” (1981: 109). Greeley's series sacralizes popular culture by embedding this theological quest within the accessible conventions of mass-market genre fiction.

Conclusion

This study has argued that Andrew Greeley's fiction exemplifies a distinct synthesis of Catholic theology and postmodern narrative form. Through close readings of *The Cardinal Sins*, *Thy Brother's Wife*, *The Final Planet*, and the *Nuala Anne McGrail series*, we have seen how Greeley consistently mobilizes postmodern strategies – parody, hybridity, metafiction, and narrative play – not to dismantle meaning altogether but to refract it through the sacramental imagination. His novels dramatize the incredulity toward metanarratives identified by Jean-François Lyotard, yet they also propose alternative ways of imagining transcendence through fragments, symbols, and stories.

The Cardinal Sins (1981) and *Thy Brother's Wife* (1982) exemplify the collapse of clerical metanarratives. Both novels dramatize ambition, desire, and fallibility within the priesthood, destabilizing the idealized narratives of ecclesial authority. Yet, even amid scandal and transgression, Greeley sustains the possibility of grace, suggesting that broken lives can still bear traces of the divine. This dynamic resonates with Lyotard's paralogy and David Tracy's pluralist theology: the destabilization of grand narratives does not entail nihilism but rather the opening of new, multiple ways of encountering meaning.

In *The Final Planet* (1987), Greeley deploys the tropes of science fiction to reimagine theology across cultural frontiers. The clash of Earthly Catholicism with alien religiosity enacts what Linda Hutcheon terms historiographic metafiction: a narrative that stages the encounter of competing traditions while questioning the authority of any single historical or doctrinal version. Here, Catholicism becomes one discourse among many, yet it is precisely through its vulnerability to otherness that it discloses sacramentality. The novel suggests that theology, like postmodern narrative, thrives not on closure but on dialogue and multiplicity.

The *McGrail series* (1994-2005) extends these concerns through its hybrid form, fusing detective fiction, romance, Irish history, and

mystical vision. Nuala Anne's prophetic flashes expose the constructedness of both historical knowledge and narrative itself, foregrounding the instability of truth-claims in ways reminiscent of Hutcheon's parody and Jameson's cultural logic. At the same time, the series insists that mystery, both human and divine, persists within these fragments. Greeley turns the detective genre – so often a quest for definitive answers – into a site for sacramental wonder, where partial knowledge and unresolved histories become vehicles for grace.

Taken together, these case studies demonstrate that Greeley is neither a naïve realist nor a purely cynical ironist. Instead, he inhabits what might be called a Catholic postmodernism: a mode of writing that embraces postmodern fragmentation, irony, and parody while refusing to relinquish the sacramental conviction that the divine shines through the contingent. His fiction exemplifies what Kearney calls a "hermeneutics of religion," i.e. an openness to God through narrative, imagination, and the play of otherness.

This dual commitment – to postmodern form and Catholic sacramentality – marks Greeley's singular contribution to contemporary literature. Where Jameson emphasizes the commodification of culture under late capitalism, Greeley demonstrates how even mass-market novels can carry theological weight. Where Lyotard highlights the collapse of grand narratives, Greeley dramatizes this collapse within the Church itself, only to disclose grace in the ruins. Where Hutcheon identifies parody and historiographic metafiction as central to postmodern poetics, Greeley appropriates these very techniques to tell stories that remain fundamentally theological.

To read Greeley as a Catholic postmodern novelist is, therefore, to recognize that theology and postmodernism are not adversaries but potential collaborators. His novels reveal how the Catholic imagination, far from being trapped in premodern dogma, can engage the pluralist, ironic, and hybrid aesthetics of our time. In Greeley's hands, postmodernism becomes not merely a symptom of cultural decline but a fertile medium for reimagining the sacred in a fragmented world.

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Oszkar Mailand and the Romanian Curse

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Abstract:

In 1891 an interesting article about the Romanian curse, entitled *Der Fluch in der siebenbürgisch-rumänischen Volkspoesie* (*The Curse in the Transylvanian Traditional Poetry*), appeared in Leipzig in the prestigious journal *Zeitschrift für Volkskunde*, edited by Dr. Edmund Veckenstedt. The author, a Hungarian scholar from 19th-century Transylvania, published the article in the same issue of the renowned journal in which other Transylvanian Saxon scholars published their studies on Romanian traditions. The present paper aims to be a critical look at Oskar Mailand's article, whose existence is known but whose content is quasi-unknown due to the fact that access to foreign journals was almost impossible in the past. What is certain, however, is that the Transylvanian scholars of the 19th century, both Saxon and Hungarian, placed Romanian culture on the European map, a merit that cannot be disputed.

Keywords: Oskar Mailand, curse, traditional poetry, 19th century

The article *Der Fluch in der siebenbürgisch-rumänischen Volkspoesie* (*The Curse in Romanian-Transylvanian Folk Poetry*), signed by Oszkár Mailand, represents a valuable contribution to the study of Romanian folklore, with a focus on the specific elements of folk poetry from Transylvania.

Published in 1891 in the well-known journal *Zeitschrift für Volkskunde* edited by Dr. Edmund Veckenstedt (based on internal references to earlier publications, such as *Ausland* from 1886), the text explores the role of the curse (*Fluch*) as a central motif in Romanian folk creation, emphasizing its cultural originality in the context of external influences.

A few biographical data are as follows: born in Geoagiu, Hunedoara County, the Hungarian ethnographer Oszkar Mailand graduated from Royal Hungarian Franz Joseph University in Cluj in 1883, with a diploma in German language and literature, teaching first in Sf. Gheorghe and later in Deva, Hunedoara County. Between 1885-1886 he followed Romance studies in Paris, and, at home, he also taught

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Romanian. As an ethnographer, he collected Romanian folk poetry and published in prestigious journals like *Századok* (*Centuries*) and *Ethnographia* in Budapest, *Ausland* and *Zeitschrift für Volkskunde* in Germany and in 1889 he became the secretary of the Hunedoara County Historical and Archaeological Society. He died in 1924 in Deva.

As a connoisseur of the multicultural Transylvanian environment, Mailand approaches the subject from a comparative perspective – a novelty in the domain at that time – combining ethnography with literary analysis in order to highlight how the curse is not merely a rhetorical figure, but an essential force that grants Romanian folk poetry emotional and mythical depth.

This paper aims to dissect Mailand's article on several levels: structural, thematic, stylistic, and cultural, analyzing the way the author constructs his argumentation, the examples he selects, and the broader implications for understanding the Romanian popular soul. We will examine how the author positions the curse as a "*red thread*" (*roter Faden*) running through the whole of folk poetry, linking it to ancestral beliefs, external influences, and profound emotional expressions.

Mailand begins by defining the role of ethnography (*Volkskunde*) as the science that studies the expressions of the popular soul, influenced by local and natural conditions, emphasizing the importance of original features as opposed to universal ones. In his own words (Mailand, 1891: 208),

Die Aufgabe der Volkskunde ist es, sich auch mit solchen Äusserungen und Zügen der Volksseele zu beschäftigen, welche diese Wissenschaft mit neuen Gesetzen bereichern, ihr neue Gesichtspunkte aufstellen. Die Bildung der Volksseele ist, wie wir wissen, von Lokalen und Naturverhältnissen beeinflusst, verschieden und diese Verschiedenheit prägt, trotz den vielen ähnlichen Zügen, eine gewisse Originalität der Volksdichtung auf.(...) Diese Auffassung konnte ich auch beim Studium der rumänischen Volkspoesie nicht ausser Acht lassen. Die rumänische Volkspoesie ist ja auch sozusagen gesättigt mit solchen Zügen und Motiven, die wir bei den Fischern Skandinaviens ebenso vorfinden wie bei den Steppenbewohnern Persiens. Auf jeden Schritt überraschen uns Motive, die als allgemeine Äusserungen des menschlichen Genius jeder Poesie eigen sind oder wenigstens bei mehreren Völkern ähnlich aufgearbeitet werden.¹

¹"The task of folklore studies is to also study those expressions and traits of the folk soul that enrich this science with new laws and establish new perspectives. The formation of the folk soul, as we know, is influenced by local and natural conditions, and this diversity, despite the many similarities, shapes a certain originality in folk poetry. (...) I could not ignore this view when studying Romanian folk poetry. Romanian folk poetry is, so to speak, saturated with such traits and motifs that we find among the fishermen of Scandinavia as well as among the steppe dwellers of Persia. At every step, we are surprised by motifs that, as general expressions of human genius, are inherent in every form of poetry, or at least are similarly developed among several peoples".

He applies this perspective to Romanian folk poetry, acknowledging external influences (Slavic, Hungarian, Balkan), but insisting on the way in which the Romanian people adapt them to their own character. The curse is presented as a characteristic element, not merely an occasional expression, but a force that spreads through the very essence of poetry, derived from religious beliefs and intense emotions.

The author distinguishes the poetic curse from the everyday one, linking it to deeper causes: family conflicts, betrayals in love, social injustices. Examples include maternal curses (considered the most powerful), curses of lovers, personifications of animals (such as the cuckoo, a mythical bird), and magical formulae against diseases. Mailand compares these motifs with those found in the world literature (Shakespeare) and the mythology of other peoples, suggesting Balkan origins for the frequency of the curse.

The article concludes with an invitation to comparative studies, emphasizing the ethnographic value of the subject.

The central theme of the article, the curse is described as a vital force that grants Romanian folk poetry “*kraft und schönheit*” (power and beauty). Mailand presents it not as a mere rhetorical figure, but as a manifestation of the popular soul, connected to supernatural beliefs. In folk poetry, the curse appears as a remedy for the wounded soul, especially in contexts of primitive civilization, where belief in its efficacy provides consolation.

A key aspect is its religious origin: the Romanian attributes a divine power to the curse, carried out by higher forces. This is reflected in the examples given, such as the maternal curse: “*Schlange sauge deinen Körper / Wie du meine Brust gesauget*” (May the snake suck your body / As you sucked my breast). Here, the curse evokes crude, natural imagery, linking maternal pain to cosmic revenge. Mailand notes that only the mother’s curse is considered fatal, while the absence of the father’s curse suggests a latent matriarchy in Romanian folklore, likely influenced by pre-Christian myths, that is, this maternal curse may be compared with the curses in Greek mythology, where mothers such as Niobe or Medea invoke divine vengeance; the matrifocal vision of the family can be traced back to Dacian or Thracian cultures, where women held prominent spiritual roles. This contrasts with the Slavic patriarchal model, where fathers possess mythical authority, as in Russian epics. Consequently, the curse, as a motif, is not unique to the Romanians, but its mode of expression—intense, ritualistic, and tied to religious beliefs—makes it distinct. Mailand emphasizes that, although similar motifs appear in Scandinavian or Persian poetry, their adaptation to the Romanian soul grants them originality.

From a symbolic point of view, the maternal curse – “*Schlange sauge deinen Körper*” (May the snake suck your body) – uses the snake

as a symbol of vengeance and regeneration, common in Romanian mythology (e.g., the household snake in fairy tales). This curse inverts the maternal role: the nurturing breast becomes a source of destruction, reflecting deep psychological tensions, comparable to the Freudian Oedipal complex, but rooted in folk beliefs.

In the context of love, curses are passionate and Shakespearean, as the author says (e.g., Lear's curse). The example "*Wenn du mich nicht mehr kannst lieben, / Eisen schnüre deinen Körper*" (If you can no longer love me, / May iron bind your body) combines pain with images of physical destruction, underlining betrayal as a source of chaos. These curses are not merely verbal; they have mythical consequences, transforming people into plants or animals, reminiscent of European fairy tales (e.g., the cursed girl becoming a cherry-plum tree, similar to *Sleeping Beauty*). On the other hand, there is also an intertwining between irony and cruelty in the above example, which creates a tragicomic beauty, similar to Shakespeare's sonnets, demonstrating how Romanian folklore, though oral, reaches high literary levels, anticipating European Romanticism.

In love curses, natural imagery dominates: wind, sun, dew as agents of withering and destruction. The example "*Es verdorr' mich Gottes Wille / Wie der Wind verdorrt die Erde*" (May God's will wither me / As the wind withers the earth) evokes a cosmic fatality, where the curse aligns with divine will, underlining the Christian-pagan syncretism of Romanian folklore.

The cuckoo, as a mythical bird, represents ambivalence: oracular and benevolent in love, yet cursed when its prophecies fail: "*Dein Schnabel verdorre*" (May your beak wither). Mailand compares its role to that of the raven in Germanic myths or the nightingale in Slavic ones, but in Romanian tradition, the cuckoo is "*par excellence mythic*", both good and evil, tied to seasonal cycles and fertility.

Magical formulae against illnesses extend the theme: the curse becomes a therapeutic ritual, with phrases such as "*Ich verwünsche dich!*" (I curse you!), reversing evil back onto its source (stone, wood, fire). These reveal an archaic, pre-Christian layer, where verbal magic controls nature, like shamanic incantations which would suggest pre-Indo-European roots. Mailand notes the rarity of exorcistic formulae, preserved in secrecy, which emphasizes the esoteric character of folklore, accessible only to initiates (witches). The etymology of the word "*blastăm*" (from the Greek βλασφημία) indicates an interesting comparison with Balkan folklore. Mailand suggests that the frequency of the curse among Romanians derives from the Balkan Peninsula, a region marked by Byzantine and Ottoman influences. In Serbian or Bulgarian folklore, curses appear in heroic ballads, but they are more warlike, connected with battles and honor. Among Romanians, they are intimate,

centered on love and family, reflecting an agrarian society in which domestic conflicts dominate popular narratives. This highlights adaptation: Slavic elements (such as the personification of animals) are Romanized, blending Latinity with Oriental mysticism.

The article's thematic focus underlines the duality of the curse: destructive, yet cathartic, reflecting the resilience of the popular soul in the face of suffering.

From a stylistic point of view, Mailand adopts an academic yet accessible tone, blending scientific rigor with ethnographic enthusiasm. His German – used for an international audience as the article appeared in the well-known at that time journal *Zeitschrift für Volkskunde* in Leipzig – is precise, with long and complex sentences, typical for the scientific prose of the era.

The author uses vivid metaphors – the curse as a “*roter Faden*” (red thread) – to illustrate the way the motif permeates poetry. The structure is logical: theoretical introduction, presentation of the theme, detailed examples, comparisons, and conclusion.

Poetic examples are cited in German, with approximate translations from Romanian, preserving rhythm and rhyme, which demonstrates literary sensitivity. Footnotes (e.g., the explanation of “*fliegendes Wort*” as the beginning of a poem without logical connection) add depth, linking Romanian poetry to Hungarian.

The narrative style alternates between objective analysis and emotional evocation, as in the description of maternal curses, where the raw imagery recalls Greek tragedy. Mailand avoids sentimentalism, focusing on ethnographic value, yet acknowledges poetic beauty (“*schönsten und mächtigsten Äusserungen*” – “the most beautiful and powerful expressions”).

A stylistic weakness is the lack of precise sources for the examples; the author relies on personal knowledge, typical of 19th century folklorists, yet this gives the text an authentic air of a direct witness.

The article belongs to the Romantic movement of rediscovering folklore, influenced by Herder and Grimm, where folk poetry is viewed as the expression of the national soul. Mailand, as a Hungarian Transylvanian, emphasizes the multiculturalism of the region by stating that the Romanian people, during their migrations, came into contact with various ethnic groups, and in Transylvania, where they found a stable homeland, they were surrounded by Hungarians, Saxons, and Slavs. This multiculturalism is reflected in the mythological conglomerate of Romanian folklore, dominated by Slavic elements yet adapted to a distinct character.

In the author's opinion, the curse, with its Balkan roots, reflects Romanian migrations and contacts with Byzantines and Slavs. Culturally, it highlights a fatalistic worldview, where the word carries magical

power, tied to pre-Christian beliefs (e.g., the personification of nature). Comparisons with Shakespeare or Persian/Scandinavian myths place Romanian folklore in a universal context, yet Mailand insists on originality: the adaptation of foreign elements to the Latin character of the Romanians.

In the Transylvanian ethnic mosaic context of the 19th century, the article contributes to intercultural dialogue, with Mailand (of Hungarian origin) appreciating Romanian poetry and counterbalancing the ethnic tensions of his era. He emphasizes that the curse is not vulgar but poetic, stemming from profound suffering rather than trivialities such as taxes. This implicitly criticizes the feudal society, where Romanian peasants suffered under foreign domination, the curse becoming a form of verbal resistance. The ethnographic implications are also profound: the curse as a coping mechanism in rural societies, where suffering is externalized through language; the cathartic curse provides solace in the absence of justice, reflecting an oral culture in which the word has magical force. Mailand distinguishes the poetic curse from the everyday one, suggesting that poetry elevates raw emotions into art. This anticipates modern theories of folklore as collective therapy (Lévi-Strauss, 1987). Comparison with other literatures shows similarities with Scottish ballads or Slavic poetry, but uniqueness in the maternal emphasis and the myth of the cuckoo. Later studies (e.g., those of Bartók or Eliade) confirm Mailand's observations, linking the curse to mythical archetypes.

From a literary perspective, the article elevates folk poetry to the rank of high art, with the curse functioning as a dramatic instrument equivalent to Shakespearean monologues. It anticipates modernism, where the word becomes a creative/destructive force (like Blaga or Arghezi in Romanian literature).

Although the article *Der Fluch in der Siebenbürgisch-Rumänischen Volkspoesie* represents a significant contribution to Transylvanian ethnography at the end of the 19th century, offering a valuable perspective on Romanian folkloric motifs, it is not without criticisms and limitations. These derive both from the historical and methodological context of the era, as well as from the specific approach of the author, Oszkár Mailand (Oskar von Mailand-Deva), a Hungarian ethnographer active in the multicultural space of Austro-Hungarian Transylvania.

In what follows, we will elaborate on these aspects, drawing on the analysis of the text, on the general limitations of 19th-century ethnography, and on later critical perspectives from Romanian and European folklore studies. The critique is structured along several axes: methodological, cultural-ideological, linguistic, and contextual, in order to provide a balanced evaluation.

From a methodological point of view, one can notice a certain lack of scientific rigor and empirical sources. The absence of precise and detailed sources for the poetic examples quoted is one of the most obvious limitations of the article. Mailand presents numerous fragments of folk poetry – maternal curses, magical incantations, mythical motifs with the cuckoo – but does not specify their provenance: whether they were collected personally, from which Transylvanian regions, or borrowed from earlier collections.

This is a common feature of 19th-century ethnography, when many authors relied on memory, oral accounts, or uncritical compilations, without documenting the process of collection. For example, in later studies of Romanian folklore the importance of collection context (location, informant, date) is strongly emphasized – an element absent here.

This omission risks distorting the authenticity of the material, since oral poetry is fluid and regionally varied – a curse from Maramureș might differ from one in Oltenia, yet Mailand generalizes everything under the umbrella of “*Rumänischen Volkspoesie*”.

Moreover, the article does not describe a clear research methodology. Mailand mentions “*beim Studium der rumänischen Volkspoesie*”, but does not specify whether he conducted fieldwork, interviews, or systematic comparative analysis. This reflects the limitations of romantic ethnography, later criticized in modern studies (such as those of the 1960s – 1970s influenced by Claude Lévi-Strauss’s structuralism) for lack of empirical objectivity.

In the Romanian context, after 1945, folklore studies underwent major changes, shifting from romantic approaches to Marxist or structuralist ones, precisely to address such deficiencies (see, for instance, the research of the Folklore Archive in Cluj, which emphasized postwar methodological reconfigurations).

Without a solid empirical foundation, the article risks being perceived as a subjective compilation rather than a scientific analysis.

Certain ideological critiques, like nationalist bias and ethnic essentialism can be brought to the article. Mailand insists on the “*eigenthümlichen Züge*” (peculiar traits) of the Romanian popular soul, presenting the curse as a unique manifestation of the national character. This essentialist approach – the idea of a fixed, immutable *Volksseele* (folk soul) – is typical of 19th-century nationalist Romanticism, inspired by Herder and Grimm, but criticized in modern ethnography for its reductionism.

The author generalizes traits such as belief in the supernatural power of the curse as intrinsically Romanian, ignoring socio-economic or regional variations. For instance, he attributes the frequency of curses to Balkan influences but does not explore how these interacted with social conditions, such as feudal oppression under Austro-Hungarian rule, which may have amplified verbal expressions of frustration.

As an ethnographer of Hungarian origin, Mailand could be accused of an external bias: his *outsider* perspective on Romanian culture risks exoticizing or stereotyping it. In 19th century Transylvania, ethnic tensions were acute, with Romanian national movements (such as the Transylvanian School) struggling for cultural recognition. Written in German for a European audience, the article may have served an imperial discourse in which Romanian folklore was presented as a “conglomerate” of Slavic influences, minimizing original Latin elements.

Recent studies on ethnography in Romania such as Alexandru Iorga’s “*Ethnography in Romania: Hegemony, Project and the Myth of Structuralism*” criticize such 19th-century approaches as tied to nationalist projects, where folklore was used to build hegemonic identities. While Mailand avoids aggressive nationalism, his generalizations may be seen as a subtle form of cultural appropriation, in which a non-Romanian author interprets the “soul” of the people without involving indigenous voices.

Furthermore, ethnic essentialism ignores cultural dynamism: folklore is not static but evolves, and the curse could have been influenced by migration or globalization – neglected aspects in his analysis. Postcolonial critiques inspired by Edward Said (Said, 1978) would detect here a form of Balkan Orientalism, portraying Romanians as a “primitive” people with intense magical beliefs.

From the linguistic and translation points of view, the poetic fragments are translated approximately into German, which alter the original Romanian nuances. For example, rhythm, rhyme, and the symbolic richness of the Romanian language (such as wordplay or natural imagery) are often lost in translation, compared to the translations of other Saxon scholars, like Friedrich Wilhelm Schuster² who, in his translations of Romanian folk songs preserves not only the rhythm and rhyme, but also the number of syllables.

Mailand acknowledges the Latin influence in Romanian, but his translations – such as “*Schlange sauge deinen Körper*” – may sound cruder or more literal than the original, distorting its poetic beauty. This was a common limitation of bilingual ethnography in the period, later criticized in modern linguistics for contextual loss, like, for example, Bronisław Malinowski’s *Practical Anthropology*, in which the author emphasizes the importance of the native language.

² Friedrich Wilhelm Schuster was an important Transylvanian Saxon scholar of the 19th century who contributed significantly to the study of Romanian folk culture through his collection of Romanian folk songs from around Sebeş compiled in the period 1845-1846, which remained in manuscript under the title *Wallachische Volkslieder aus Siebenbürgen* (Romanian Folk Songs from Transylvania), but also through his study on the same subject of the Romanian folk song, entitled *Über das walachische Volkslied* from 1862.

The etymology of the term “*blastăm*” is correct (from Greek), but his superficial analysis does not explore Transylvanian dialectal variations, where Hungarian or Saxon influences could have altered meaning. This reduces the comparative value of the article.

Written around 1887, the article reflects an era of romantic nationalism but overlooks ongoing social transformations, like early industrialization, urban migration, or the influence of modern Christianity on popular beliefs. The curse is presented as timeless, without analyzing how it evolved in the 19th century under the pressure of secularization.

Studies on Romanian cultural consciousness like Eliade’s *Aspecte ale mitului* for example criticize such approaches for ignoring major issues of the 19th century, such as national unification or agrarian reform, which had direct impact on folklore.

Moreover, the female gender of witches in magical formulas is noted but not critically analyzed: this reflects gender stereotypes of the era, in which women were associated with mysticism – a patriarchal limitation of ethnography at the time.

Despite these limitations, the article remains a valuable source, later confirmed by subsequent collections, such as Bartók Béla’s work on Romanian folk music. Modern critiques highlight the need for interdisciplinary approaches, with greater emphasis on diversity and social context – remedies offered by contemporary ethnography for example, the Kriza János Ethnographic Society in Cluj.

Developing such critiques shows the evolution of the discipline, transforming Mailand’s article from a romantic text into a starting point for critical reflection.

In contemporary terms, the text invites to reflection on the role of folklore in national identity. In the age of globalization, the curse as a motif survives in folk music or literature (e.g., the novels of Sadoveanu), reminding us of cultural resilience. Although Mailand idealizes primitive aspects overlooking social evolution, the article’s value remains intact.

In conclusion, Mailand’s article is a jewel of literary ethnography, revealing the curse as the very essence of Romanian-Transylvanian folk poetry. Through thematic, stylistic, and cultural analysis, the author of this paper tried to highlight how this motif blends the universal with the particular, offering a window into the popular soul, and to emphasize the lasting relevance of the text, while inviting to further studies.

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Banned – Challenged – Censored. A Story of Local Activism fighting Book Censorship through Art

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Abstract:

This article explores the shifting landscape of book banning from the mid-20th century to the present, drawing on both academic discourse and the 2013 art installation *Banned - Challenged – Censored*; the study argues that artistic activism offers a complementary perspective to scholarly debates by juxtaposing abstract statistics to a tangible, community-driven engagement with censorship, intellectual freedom, and cultural memory. Given the sheer volume of banned works, scholarly and public discussions must rely frequently on abstraction. While such approaches can highlight systemic patterns of censorship, they also risk canceling the singularity of individual works.

Keywords: Book banning, censorship, intellectual freedom, community activism, banned books, art installation

According to a 2023 *Reader's Digest* article surveying books banned in the U.S. from the 1950s onwards, many novels “you’d never guess were offensive [...] get banned or challenged due to sexually explicit content or offensive language” (Pennington, 2023). The quote highlights (including the candid disbelief of what used to be considered offensive) the fact that the main common denominator for the most frequently banned, contested, or censored novels up to about the latter part of twentieth century, across transatlantic publications, is undoubtably sexuality, profanity and offensive language, closely followed by broad categories such as racism and violence. The works typically included in the “most banned” category currently constitute a list of twentieth-century “classics”, encompassing literature as diverse as *1984*, *The Great Gatsby*, and *Lord of the Flies*, to *Of Mice and Men*, *Ulysses*, *Lady Chatterley's Lover*, *To Kill a Mockingbird* and *I Know Why the Caged Bird Sings* etc.

All of the above, carried a certain prestige (dubious or not) precisely because of their entanglement in obscenity controversies and, at the very least, censorship debates, intentionally or unintentionally, served somewhat as promotional campaigns. It used to be a scandal, during a

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time when book banning could still be perceived as primarily a matter linked to specific novels, and most importantly, the penance of transgressing boundaries always juxtaposed questions of literary merit against moral outrage.

Henry Miller, who comes to mind as serving the argument above, figuratively walked the fine line between what could be defended on the grounds of literary merit and what was simply deemed outrageous. In a sense, the *Tropic of Cancer* (1934) was never just a novel, but a proxy for a broader cultural debate about “appropriateness” – a deliberately vague term perfectly fitting here.

For, in the above case, one could think of appropriateness as either a commentary of Miller’s metaphysical shortcomings – and thus failing to write what would be required to solely serve the arousal of senses:

You know, I wonder if Henry Miller is really all that good? I’ve tried to read his books on cross-country buses but when he gets into those long parts in between sex he is a very dull fellow indeed. On cross-country buses I usually have to put down my Henry Miller and try to find somebody’s legs to look up, preferably female. (Bukowski, 1972: 18)

– hence inappropriate for reading on cross-country busses, or through the legalistic, one size fits all, reductive argument, of pornography:

The government of the United States made it national policy to ban *Tropic of Cancer* from being sold or imported into the country arguing, “[it] dealt too explicitly with his sexual adventures and challenged models of sexual morality.” To push their agenda, the government went on to ban all of Miller’s works from entering the United States, regardless of its content or subject (Baldassarro, 2014).

A quarter century after its initial Parisian publication the book was finally relieved of its obscene status in the U.S., the legal reasoning being that “*The Tropic of Cancer* did have literary merits that separated it from other materials that had been deemed to be obscene” (Grove Press, 1964).

Today, book banning in the U.S. seems to be fundamentally linked to ideological or political stances, typically culminating in legal clashes centered around First Amendment rights in a contemporary culture war. Books themselves became somehow secondary to the larger discourse by which they are engulfed, reduced, at best, to exemplifying political and social (i)legitimacy.

It is sufficient to look at recent numbers to make this justified: for example, ALA (American Library Association) censorship reports indicate for 2023 a number 4240 unique book titles being targeted for banning. The number itself allows for little more than dividing the books

into trends, as per the original phrasing. Two of these are of particular interest:

- *Groups and individuals demanding the censorship of multiple titles, often dozens or hundreds at a time, drove this surge.*
- *Titles representing the voices and lived experiences of LGBTQIA+ and BIPOC individuals made up 47 percent of those targeted in censorship attempts. (American Library Association Reports, 2023)*

Alternatively, looking at a large-scale database such as the PEN club's index of books banned by schools (1648 unique book titles) during 2021-2022, reveals that:

These multifaceted data allow us to empirically assess the full spectrum of content being banned – the majority of which, we show, is written by women and people of color and features characters of color, both fictional and historical – but that otherwise does not neatly align with the descriptions of gratuitous sexual content or dogmatic texts on race and gender theory [...] findings suggest that it is perhaps more apt to think of current book bans as a political tactic to galvanize conservative voters in increasingly divisive electoral political districts, rather than as a pragmatic effort to restrict access to certain materials (Gonçalves et al., 2024).

Therefore, whether the issue of book banning could be summarized solely through the lens of:

(1) challenging traditional notions of power, politics, and governance; (2) examining policy as discourse and political spectacle; (3) centering the perspectives of the marginalized and oppressed; (4) interrogating the distribution of power and resources; and (5) holding those in power accountable for policy outcomes (Perez, 2025:323).

or suffices in the form of let-right debate on the issue:

Democrats asserted that the challenges to library books stemmed from “moral panic” and violated the First Amendment. In stark contrast, Republicans characterized targeted removals as mere “content moderation” aimed at “pornographic” materials that threatened children’s “innocence” (Ross, 2024: 1680).

the conclusion appears to be there remained no more banned books (pornography argument aside – understood here as historical remnant from the last century), there are only banned *categories of books*, everything becoming subordinated to streamlined advocacy efforts that cannot sustain nuanced terms in lieu of abstract political battles.

Second, the *individuality* (i.e. *literary value*, if such a charged concept is still permissible as a gauge) of titles becomes irrelevant for

showcasing intrinsic worth. It might be that “brilliant prose” still might safeguard against banning¹, but that, of course, would require individual pieces of *fiction* and not symbolic categories (such as *voices and lived experiences*) that erase the distinctiveness and literary individuality of each title.

This becomes more evident if academic discourse is taken to be the framework for interpreting and contextualizing these stances, – providing comprehensive explanations of why certain books are deemed unacceptable –, for the vast expanse of directions taken by this type of discourse allows little space for hundreds of individual works to exist *outside* their respective categories.

The sheer amount of academic literature – dedicated to exploring everything from how restricting access to books affects students’ cognitive development, critical thinking skills, empathy, and emotional intelligence, the relationship between censorship efforts and social attitudes toward race, sexuality, religion, and political ideologies on one hand and First Amendment rights to freedom of expression in light of the role played by libraries as a place deemed essential in safeguarding multiplicity, on the other – offers an overwhelming sense of completeness with little compelling possibilities to look beyond what appears not only adequate but perhaps the sole viable way to express a position on the subject matter.

One alternative to move beyond this potential dead end, would be to look at artistic endeavors that, by their nature, put books’ material presence at the forefront, thus countering abstract academic categorizations, and, more importantly, also serving as visual commentary challenging previously expressed assumptions.

A notable example is *Banned – Challenged – Censored*², a 2013 art installation designed to reflect community engagement with the issue of book banning within the larger framework afforded by events such as Banned Books Week³. Displayed in the University of Montana library’s ground floor, the art installation bearing the name Banned-Challenged-

¹ See, for example Emily Mortimer’s argument in *How ‘Lolita’ Escaped Obscenity Laws and Cancel Culture*, New York Times, 05/03/2021.

² In the summer of 2024, the University of Montana hosted the academic component of the SUSI programme for Contemporary American Literature, which brought together 17 international scholars, myself included; it was in this context that I first encountered the art installation displayed in the university library.

³ See, for example, Ellis Angel’s project *The Censor’s Cut* which transforms banned books into woven artworks (PEN America) for “censorship tries to stifle creativity, but it’s crucial that artists remain bold and true to their work, as we are exercising our fundamental constitutional rights”, and also *Unfurled*, an installation at the Lawrence Public Library that juxtaposes covers of banned and challenged books to create a visual statement on the contested circulation of information intended to symbolize “the state of distress in America’s intellectual freedom” (The Lawrence Times).

Censored resembles a miniature tower covered with banned books and paper shreds; the art work itself is 2m tall, 1.2m wide and weighs about 140kg – being constructed of steel, Plexiglas and barn wood.

This, of course, is not to suggest that academic literature is insufficient or inferior in the explanations brought forth to the expansive topic of book banning; rather, the art installation simply provides an alternative perspective highlighting something perhaps missing or discounted within traditional academic discourse and misplaced within percentages and trends.

And that alternative perspective is the tangible reality of censorship, a censorship that isn't just conceptual or legalistic, but a palpable threat to cultural memory, identity, and diversity. If bridged together with the efforts of a community, it highlights shared commitment to safeguard intellectual freedom.

This premise advances a new possibility when looking at book banning beyond an academic discourse: it brings visibility⁴ to the books themselves beyond the sterility of categories and replaces academic parlance with direct engagement.

For, “if, in the past, agents in the literary sphere were individuals with specific interests and powers, the discussion of and feedback on literary texts are now dominated by anonymous forces driven by multiple and highly complex quantitative elements.” (Salgaro, 2022). In this sense, the installation recalls an earlier mode of literary exchange, standing in contrast to the dominance of big-data interpretation and quantitative approaches to literary value.

In the case of *Banned – Challenged – Censored* there are several factors that give the above stance credence, for all - complex terms such as *community* and *actors* become something with a clearly defined identity; it transposes an abstract discussion into a local narrative (if only one of many).

Community is not a mere concept but it is *The Journal Ladies LLC*, a private enterprise that crafts journals from recycled vintage books labeled for destruction, *The Bozeman Public Library Foundation*, a public institution with a strong penchant for community building and *Humanities Montana* which defines its mission as offering “experiences that nurture imagination and ideas by speaking to Montanans’ diverse history, literature, and philosophy” (Humanities Montana, n.d); all of the above became sponsors (with additional support from 60 private parties)

⁴ For a relevant and ingenious approach see the *Unbannable Library*, hosted at Austin Peay State University, which employs oversized interactive book installations meant to resist censorship through their sheer size and also “encourages conversations about the importance of intellectual freedom, highlighting the valuable role libraries play in fostering knowledge and connection across all locations and ages” (Austin Peay State University).

to artists George Cole (former UM graduate), Sara Williams and Collin Letts who decided to create a sculpture project dedicated to books banned across the U.S.⁵

Conversely, the discourse surrounding the motivation behind the art installation, becomes more anchored, in the sense that it offers personal views based on individual experiences, making the conversation authentic and relatable. So, freedom of expression, as voiced by George Cole, reads like:

My dad actually used to tell me that freedom was never easy, and sometimes freedom of expression can be an ugly experience too; it's not always poetry and smooth reading, and so all of us kind of have to evaluate and realize the importance of freedom of expression, but at the same time, know that sometimes, we're going to disagree with the content of that book or that movie (What Maya Angelou, 2013).

and a library's intrinsic role becomes, as expressed by Flathead County Library Director, Kim Crowley:

Many people say that any library worth their salt has something to offend everyone. So, you and I might not have the same reading tastes, but you can find what you want to read, and I can find what I want to read, Crowley said libraries strive to have a broad, diverse offering to satisfy the reading taste of their communities, and maybe even challenge some people's ideas (*Ibidem*).

This, of course, is entirely different to a polished academic rhetoric relating freedom of expression to divisive content (in the particular context of libraries). However, the most notable thing it achieves is that it affords individual visibility to the books chosen for displaying.

A comprehensive list off all the books displayed on the art installation includes: *Adventures of Huckleberry Finn* – Mark Twain (1884), *Call of the Wild* – Jack London (1903), *The Catcher in the Rye* – J.D. Salinger (1951), *Invisible Man* – Ralph Ellison (1952), *Lolita* – Vladimir Nabokov (1955), *Run Rabbit Run* – John Updike (1960), *Forever* – Judy Blume (1975), *The Color Purple* – Alice Walker (1982), *The Qur'an: A New Translation* – Cleary, Thomas (1985), *Giovanni's Room* – James Baldwin (1956), *The Bluest Eye* – Toni Morrison (1970), *The Giver* – Lois Lowry (1993), *Women on Top* – Nancy Friday (1997), *Daddy's Roommate* – Michael Willhoite (1990), *Wounded: A Love Story* – Claudia Mair Burney (2005), *My Mom's Having a Baby!* – Dori Hillestad Butler (2005), *The Bible, The Grapes of Wrath* – John Steinbeck (1939), *Native Son* – Richard Wright (1940), *Fahrenheit 451* –

⁵ The art work was displayed at several libraries in Montana, including Missoula Public Library, Bozeman Public Library, Great Falls Public Library, Butte, Billings, and Helena.

Ray Bradbury (1953), *Catch-22* – Joseph Heller (1961), *Fools Crow* – James Welch (1986), *The Absolutely True Diary of a Part-Time Indian* – Sherman Alexie (2007), *The Hunger Games* – Suzanne Collins (2008), *Animal Farm* – George Orwell (1945), *The Diary of a Young Girl* – Anne Frank (first published in English in 1952), *Clockwork Orange* – Anthony Burgess (1962), *Joy of Sex* – Alex Comfort (1972), *What's Happening to My Body? Book for Boys* – Lynda Madaras (1984) and *The Satanic Verses* – Salman Rushdie (1988).

On a random side of the art installation, *The Bible* appears right next to *Huckleberry Finn*, and both are displayed just above *Fahrenheit 451*. In perfect symmetry, there is a holy book that has been challenged for nearly every reason imaginable – from concerns about religious neutrality to accusations of inappropriate content –, a seminal American novel banned for its racial language, and a censored work warning against the very act of censorship itself.

Such an eclectic collection of books invites a wide range of commentary, from shifting cultural attitudes toward censorship to the idea of literature – and, by extension, libraries – as spaces where public values and tensions are both reflected and contested. Yet, the installation doesn't merely display banned books – it stages a conversation among them and at the same time with the viewer.

It permits an engagement with the *individual* titles on display, not as static artifacts but as individual pieces of (mainly) literature, carving out a space somewhere between one's understanding of them, the intentions of those who tried to have them silenced, and the convictions of those who deemed them worthy of symbolic status in an ongoing dialogue across cultures, decades, and ideals.

The Catcher in the Rye perfectly illustrates this point. While often relegated to the category of “subversive influence”, in the Romanian educational system of the 1990s the novel was introduced as a coming-of-age narrative, praised and taught for its artistic merit and perceived age appropriateness. By contrast, its censorship history in the United States reflects deep cultural anxieties:

because *Catcher* presented a “negative” view of the world that they did not want their children to adopt. The issue was not the right of free expression but the power to assign. The disagreement was over “what ‘truth’ ought to be shared with adolescents”. The fear was that Holden Caulfield would persuade people as young as he to have no values at all – and that America was already well advanced in that direction (Maynard, 2002:714).

Encountering the same text within the context of banned-books underscores two observations: first, that “literary value” is not solely theoretical or institutionally conferred but also personal, shaped by emotional responses; and second, that categorizing books primarily along

political or social lines risks overlooking these individual receptions and distinctive literary merits.

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Therefore, if nothing else, art installations such as *Banned – Challenged – Censored* reintroduce into public discourse the possibility that debates about book banning are more effective when they engage directly with recognizable works of literature rather than relying exclusively on abstract trends, categories, or groupings.

By highlighting the material presence of books and inserting them within community contexts, these installations restore attention to literature as singular works that embody both artistic merit and personal resonance.

Considered alongside similar initiatives, they indicate that meaningful discussions of censorship should account not only for the broader structural forces that shape bans but also for the individuality of texts, which is too easily concealed when literature is reduced to labels.

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Terminologia medicală referitoare la ocupații sub lupa actualității: *navigator de pacienți, concierge doctor, concierge medical* și alte împrumuturi

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Medical Terminology Related to Occupations under the Spotlight: *Patient Navigator, Concierge Doctor, Medical Concierge* and Other Loanwords

Abstract:

Undergoing continuous development alongside technological advances and improvements in training, the medical field is called upon to provide the most appropriate terms to designate emerging occupations, new conditions, or treatments. Specialized medical language is often enriched with terms derived from common language, to which speakers assign metaphorical meanings based on analogies of certain functions. Many specialized terms are borrowed from English or other internationally used languages, as Romanian does not have a suitable equivalent. This is the case with phrases such as “patient navigator”, “medical navigator”, “nurse or assistant navigator”, “patient advisor”, “patient advocate”, or “concierge doctor”. The purpose of this article is to explain such terms and to track their inclusion in Romanian language dictionaries or specialized medical dictionaries. In addition, we are interested in discovering their semantic evolution, what their original meaning was, and whether or not they have undergone any degradation, broadening, or narrowing of meaning. The examples selected are mainly from social media, but also from various websites and medical journals. These terms demonstrate once again that the English influence is strongly felt in the current medical vocabulary.

Keywords: medical specialized language, common language, English borrowings, metaphor, synonymy, compulsory terms/ phrases

Meserii noi, termeni necesari

Relativ nouă în sistemul de clasificare ocupațională din România în urma recunoașterii sale (în decembrie 2016) și introdusă în 2017 sub codul 226922¹, activitatea denumită *navigator de pacienți* a devenit mult mai pregnantă în contextul actual, când bolile oncologice și afecțiunile cronice au luat amploare, iar mulți pacienți nu au acces la serviciile medicale necesare ori tratament adecvat din lipsă de informare, din cauze

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¹ Ocupația a fost introdusă prin Ordinul 198/1.938/2017 al MMJS/INS pentru modificarea COR, accesat la 10.07.2025.

financiare ori birocratice sau pentru că descoperă boala într-un stadiu mult prea avansat. Termenul „navigator de pacienți” denumește o persoană, de multe ori cu pregătire medicală ori socială, care ajută pacienții să navigheze prin sistemul de sănătate, oferindu-le susținere emoțională și informațională pe toată durata tratamentului, de la diagnosticare până la posibila recuperare.

„Navigatorul de pacienți” este un concept medical recent în România, deși ocupația a fost recunoscută la nivel mondial de peste 30 de ani, întâi în SUA (implementat prima oară în oncologie în 1990 de către dr. Harold P. Freeman), apoi și în Europa:

Navigarea pacienților a evoluat ca strategie de îmbunătățire a rezultatelor în rândul populațiilor vulnerabile prin eliminarea barierelor din calea diagnosticării și a tratării la timp a cancerului și a altor boli cronice. Dezvoltarea conceptului de navigare a pacienților a fost legată de concluziile audierilor naționale ale Societății Americane de Cancer privind cancerul în rândul persoanelor sărace. Audierile au avut loc în 1989 în 7 orașe americane. Mărturiile au fost date în principal de americani săraci de toate rasele și grupurile etnice care fuseseră diagnosticați cu cancer. (Freeman, Rodriguez, 2011: 3539, trad. n. P.N.)

Harold P. Freeman, bazându-se pe experiența personală, a teoretizat 9 principii ale „navigării pacientului” (2011: 3541, traducerea și adaptarea ne aparțin):

1. Este un model de furnizare a serviciilor medicale centrat pe pacient. Scopul navigării este de a înlesni mișcarea acestuia printr-un continuum complex de îngrijiri medicale. „Călătoria” pacientului debutează în cartierul său de reședință, ajungând apoi la un cadru medical (clinică/ spital) în care o anomalie se depistează, se pune un diagnostic și se aplică un tratament. Călătoria este continuă, de la reabilitare și supraviețuire până la finalul vieții.

2. Navigarea pacientului ajută la integrarea virtuală a unui sistem de sănătate fragmentat pentru fiecare pacient în mod individual: este o forță motrice care pune accent pe deplasarea rapidă printr-un sistem complicat de îngrijire medicală.

3. Funcția esențială a navigării pacientului este de a elimina barierele ce împiedică acordarea îngrijirii medicale în timp util în orice segment al sistemului de sănătate. Ea se îndeplinește eficient printr-o relație individuală navigator – pacient.

4. Navigarea pacientului trebuie să aibă un domeniu clar de activitate, prin care să se distingă rolul și responsabilitățile navigatorului față de ceilalți furnizori medicali. Navigatorii ar trebui să facă parte din echipa de asistență medicală, astfel încât pacientul să aibă beneficii maxime.

5. Furnizarea serviciilor de orientare a pacienților trebuie să fie rentabilă și în directă legătură cu pregătirea și competențele necesare îndrumării unui pacient într-o anumită etapă a procesului continuu de îngrijire.

6. Persoana responsabilă cu navigarea pacienților trebuie stabilită în concordanță cu nivelul de competențe necesar într-o fază anume a navigării. Serviciile de navigare pot fi oferite de navigatori neprofesioniști instruiți sau de cei profesioniști (asistenți medicali și asistenți sociali).

7. Într-un sistem de îngrijire prestabilit, este importantă delimitarea punctului în care începe navigarea și a celui în care se încheie.

8. Pacienții trebuie ghidați prin sisteme deconectate de îngrijire medicală (i.e. centre de îngrijire medicală primară și terțiară). Ghidarea pacienților poate servi ca liant al acestor sisteme nelegate între ele.

9. Sistemele de navigare a pacienților necesită coordonare.

Un posibil sinonim pentru „navigator de pacienți” ar fi cel de *facilitator* în domeniul serviciilor de îngrijire. Navigatorul medical este un profesionist care susține mai ales pacientul oncologic să navigheze ori să parcurgă traseul de multe ori sinuos al sistemului de sănătate, oferind sprijin „în navigarea birocrăției, ușurând accesul la resurse medicale și sociale și asigurându-se că pacienții înțeleg planul de tratament și își pot gestiona sănătatea într-un mod optim.” (<https://www.politicidesanatate.ro/o-noua-profesie-sprrijinul-pacientilor-oncologici/>, accesat la 10.07.2025)

Etimologie și evoluție semantică. Câmpuri lexicale. Denumiri conexe

Substantivul *navigator* este consemnat în dicționarele românești ca aparținând terminologiei maritime, aeronautice ori informatice, nu și celei medicale, lucru ce demonstrează că trecerile de la lexicul comun la cel specializat nu sunt întotdeauna înregistrate în timp real de lucrările lexicografice:

Terminologizarea ori «migrarea» cuvintelor din lexicul comun spre cel specializat constituie un proces de transformare sau de îmbogățire cu un nou sens de specialitate a unui cuvânt din lexicul uzual. Asistăm la un **transfer semantic**, cuvântul desemnând un nou concept. [...] *Extinderea sensului inițial* se face adesea prin **metaforă** sau prin **metonimie**, un cuvânt concret poate fi folosit cu valoare abstractă sau invers, ori poate denumi partea pentru întreg sau întregul pentru parte. **Cele mai întâlnite tipuri de metafore sunt acelea în cadrul cărora analogiile se realizează prin evocarea formei sau a funcției.**

Între sensurile unui lexem polisemantic există întotdeauna anumite legături semantice care derivă unul din altul și se explică reciproc, polisemia fiind rezultatul transferului unei denumiri mai vechi pentru un obiect care capătă ulterior o nouă accepție. Asemenea **extensiuni semantice** ale unității terminologice se realizează pe bază de **metaforă**, metonimie sau sinecdocă.

Când transferul este motivat de asemănări după formă, intensitate, cantitate, impresie sau de asemănări funcționale, ori antropomorfe, ne confruntăm cu apariția unui nou sens obținut prin metaforă. (Staicu, 2016: 35–36, s.n.)

Sintagma *navigator de pacienți* ori *navigator medical* este frecvent întâlnită în spațiul digital, dovadă numărul mare de site-uri unde regăsim informații diverse privitoare la această meserie². Grupul nominal a fost împrumutat din engleză prin traducere directă, reprezentând evident un calc lingvistic, mai exact un calc frazeologic: copierea (traducerea literală) a unei unități frazeologice (din engl. *patient navigator, patient advocate*³): *patient* „pacient” + *navigator* „persoană care ghidează sau conduce pe cineva printr-un sistem sau teritoriu necunoscut”. *Patient navigator* înseamnă „cel care ghidează pacienții”. Asemenea calchieri sunt justificate de lipsa unor lexeme corespondente în limba română și reprezintă o tendință de adaptare a practicilor occidentale în sistemul nostru de sănătate. Navigatorul devine „ghidul, însoțitorul, companionul”, „cel care orientează sau conduce” pacienții, acțiunea realizându-se în beneficiul acestora. Substantivul *navigator* capătă, evident, un sens figurat, metaforic.

Etimologic vorbind, lexemul *navigator* (lat. *nāvigatōr, -ōris* „marinar, corăbier”) este un derivat progresiv cu sufixul de agent *-tor* (din lat. *-torius*) de la verbul latinesc *nāvigō, nāvigāre* „1. a naviga; 2. a

² S-au înființat deja *școli de navigație a pacienților* (prima acreditată în România datează din 2021, *Amazonia Navigators*, a cărei fondatoare este Victoria Asanache). Vezi <https://www.amazonia-navigators.ro/>, accesat la 10.07.2025. Universitatea din București (prin Facultatea de Biologie) în colaborare cu Universitatea de Medicină și Farmacie „Carol Davila” din București au lansat un program postuniversitar numit *Navigator de pacienți* începând cu luna octombrie a anului 2024. Pentru mai multe informații, a se vedea <https://unibuc.ro/studii/lifelong-learning/programe-postuniversitare/> sau <https://www.facebook.com/profile.php?id=61561950039325>, accesate la 10.07.2025.

³ Cele două sintagme sinonime apar în *Dicționarul de termeni oncologici* (Dictionary of Cancer Terms) publicat pe site-ul oficial al guvernului american dedicat Institutului Național pentru Cancer (NIH) și beneficiază de o definiție comună: „O persoană care ajută la îndrumarea unui pacient prin sistemul de sănătate. Aceasta include ajutor în parcurgerea etapelor de screening, diagnostic, tratament și urmărire a unei afecțiuni medicale, cum ar fi cancerul. Un navigator de pacienți ajută pacienții să comunice cu furnizorii lor de servicii medicale, astfel încât să primească informațiile de care au nevoie pentru a lua decizii cu privire la îngrijirea sănătății lor. Navigatorii de pacienți îi pot ajuta, de asemenea, pe pacienți să stabilească programări pentru vizite la medic și teste medicale și să obțină sprijin financiar, juridic și social. Aceștia pot lucra totodată cu companiile de asigurări, angajatorii, managerii de caz, avocații și alte persoane care pot avea un efect asupra nevoilor de îngrijire a sănătății ale unui pacient. Se mai numește și avocat al pacientului” (trad. noastră). A se consulta, în acest sens: <https://www.cancer.gov/publications/dictionaries/cancer-terms/def/patient-navigator>, <https://www.cancer.gov/publications/dictionaries/cancer-terms/def/patient-advocate>, accesate la 11.07.2025.

înota” (Crăcea, 2009: 494)⁴, „a călători pe apă”. Potrivit DEX, *navigatorul* este: „1. persoană care întreprinde lungi călătorii pe mări și oceane; persoană care conduce o navă sau face parte din personalul unei nave; prin extensie, persoană care călătorește pe apă; 2. membru al echipajului unei aeronave care conduce efectiv zborul ei” (din fr. *navigateur*, it. *navigatore*, lat. lit. *nāvigatōr*, -ōris, de la *nāvigāre* „a călători pe mare” și *nāvis* „navă, vapor”) (<https://dexonline.ro/definitie/navigator/definitii>, accesat la 10.07.2025)

În *Dicționarul limbii române* (DA/ DLR): *navigator*, -toare s.m. și f. apare cu sensurile: „1. persoană care întreprinde călătorii lungi pe mare în scopuri științifice, comerciale etc.; persoană care este pricepută la tehnica navigației; persoană care conduce o navă sau face parte din personalul ei (*marinar*); 2. membru al echipajului unei aeronave (care dirijează efectiv navigația ei aeriană) (*aeronaut*, *cosmonaut*)” (<https://dlr1.solirom.ro/>, accesat la 10.07.2025). *Dicționarul limbii române moderne* (DM) surprinde aceleași înțelesuri pentru derivatul postverbal *navigator*. (<https://dm.solirom.ro/>, accesat la 10.07.2025)

Cât privește *Dicționarul de cuvinte recente* (DCR), ediția a III-a (2013), semnat de Florica Dimitrescu, Alexandru Ciolan și Coman Lupu, termenul de *navigator* apare înregistrat numai cu accepțiile din domeniul informatic: „1. persoană care navighează pe internet; 2. program de navigare care permite căutarea și consultarea paginilor și site-urilor pe internet (după fr. *navigateur*, engl. *surfer*)” (<https://solirom-clre.gitlab.io/texts/dcr3/site/>, accesat la 10.07.2025).

Sensul figurat al verbului *a naviga* apare în româna actuală în expresii din limbajul internautic/ informatic, comercial ori profesional: *a naviga pe Internet/ computer* (de aici și utilizările extinse: *a naviga prin documente/ ferestre/ fișiere/ foi de calcul/ foldere/ meniuri/ pagini/ site-uri Web/ pe tastatură/ prin fotografii/ biblioteca cu imagini/ în Windows/ printre informații*), *a naviga prin magazinele online*, *a naviga prin birocrăție*, *a naviga în carieră* etc. Activitatea de „navigare” este corelată totodată și cu procesul de dezvoltare personală, aspect ce poate fi identificat chiar în titlul unei cărți semnate de Anne de Graaf & Klaas Kunst, *Einstein și arta de a naviga. O explorare a leadershipului modern* (s.n. – P.N.):

Einstein... Vă va acompania de-a lungul întregii *călătorii*, simbolizând cu strălucire judecata scrutătoare și capacitatea neobosită de a pune întrebări. [...] Sunteți asemenea unui bun *navigator*, care își aduce în meseria sa iscusința și cunoștințele, dar care știe și să se folosească de forțele din *mediul său natural*

⁴ Elena Crăcea, *Dicționar latin-român, român-latin*, ediția a 3-a, Constanța, Editura Steaua Nordului, <https://www.eminescubucuresti.ro/wp-content/uploads/2022/08/Dictionar-latin-roman-roman-latin-Elena-Cracea.pdf>, accesat la 11.07.2025.

și de elementele acestuia – **apa, vântul, marea**. (<https://altex.ro/einstein-si-arta-de-a-naviga-anne-de-graaf-klaas-kunst/cpd/660C72E1C2604/>, accesat la 30.07.2025, s.n. P.N.)

Pe pagina Ordinului Asistenților Medicali Generaliști, Moașelor și Asistenților Medicali din România (OAMMR) este anunțată lansarea unui proiect intitulat „Leadership. Inspirație și transformare”, unul dintre obiective fiind acela de „creștere a capacității *de a naviga prin schimbări organizaționale* și de a implementa inovații care îmbunătățesc procesul de lucru” (<https://www.oammbuc.ro/>, accesat la 13.07.2025). *Navigarea* este, așadar, în relație directă cu ideea de evoluție sau transformare, de parcurs, itinerar, drum. Aluzia la confruntare, la călătoria plină de obstacole reiese și din motto-urile alese pentru a promova necesitatea unei asemenea ocupații medicale: „*Valuri de îți ies în cale*, tu ai soluția de *navigare*” (<https://www.facebook.com/navigatordpacienti/about>, accesat 13.07.2025).

În ciuda recurenței sale în social media ca element al jargonului medical, am întâlnit o singură lucrare ce exemplifică sintagma *navigator de pacienți* sub forma nominal + adjectiv categorial: „*navigator medical* s.m. (med., muncă) profesia persoanei care ajută un pacient să-și înțeleagă diagnosticul și să parcurgă toate formalitățile necesare pentru a primi un tratament corespunzător” (Barbu *et alii*, 2022, II: 337-338).

Evoluția semantică a termenului reprezintă, cu siguranță, un caz de lărgire a sensului bazată pe un proces de metaforizare. Discutând despre tipurile de metafore care stau la baza terminologiei medicale, Eugenia Mincu identifică, printre altele, și metafore „axate pe similitudinea funcțiilor” (2017: 277-278). Simona Nicoleta Staicu (2016: 40) subliniază, în aceeași direcție, că au loc transferuri semantice bazate pe metaforă, „în care analogiile sunt construite pe baza asemănării funcționale a proceselor implicate”; „o serie de verbe polisemantice [...] se folosesc cu sensuri precise pentru a evidenția funcționalitatea proceselor și acțiunilor medicale”. Considerăm că, și în cazul substantivului *navigator*, se poate invoca această tipologie. Așa cum navigatorul (marinarul sau aeronautul) călătorește pe distanțe lungi cu scopul de a descoperi ținuturi necunoscute ori lucruri noi, înfruntând adeseori intemperii, *navigatorul de pacienți* are un rol similar: acela de a explora hățișurile sistemului sanitar și de a se confrunța cu birocrăția pentru a face lucrurile mai clare în favoarea celui pe care îl reprezintă, pacientul:

A fi navigator de pacienți nu înseamnă doar să știi să *oriezi prin hățișurile sistemului*. Înseamnă să fii un om de mână când simte că se scufundă. Să-i arăți că nu e singur.

Să-i spui: «hai că mergem împreună, și dacă dăm de-un zid, îl decorăm frumos și-l sărim».

[...] *navigatorii*, care fac legătura între medici și pacienți, care „traduc” informații și documente medicale în „pacientează”, care facilitează accesul la

2nd opinions, la medici sau investigații medicale, care ajută pacienții să **navigheze pe oceanul medical** de frici, incertitudini și provocări (<https://www.facebook.com/public.andicarlan>, accesat la 11.07.2025).

Acest specialist parcurge, spre folosul pacientului, un traseu anevoios al serviciilor medicale necesare pentru diagnosticarea cât mai rapidă și corectă, planurile de tratament, consultațiile aferente, sprijinul financiar și emoțional. Deci navighează prin sistemul sanitar, însoțind pacientul, „călătorește” împreună cu el pentru a găsi soluții optime, îl secondează emoțional, fiindu-i ghid și sprijin sufletesc deopotrivă. *Navigarea* nu trimite așadar la un spațiu concret, pur fizic, ci la un sistem (medical) complicat, dificil de parcurs pe cont propriu din ipostaza de pacient. Sintagma „navigator de pacienți” poate fi interpretată drept metaforă conceptuală: sistemul medical este „o mare, un teritoriu necunoscut, care așteaptă să fie descoperit(ă) și explorat(ă)”, pacientul devine „călător”, iar navigatorul este „ghidul, intermediarul călătoriei”. Călătoria pacientului alături de un navigator este mai ușoară, întrucât are de traversat obstacole, de parcurs etape și de accesat anumite instituții. Sistemul medical devine un labirint, iar pacientul are nevoie de un ghid pentru a ieși din el.

Denominațiile existente în alte țări europene sunt aproximativ aceleași. În Franța, *navigatorul de pacienți* se numește *intervenat de parcours medical* („furnizor de parcurs medical”), *navigateur de santé* („navigator de sănătate”) sau *navigateur de parcours de soin* („navigator al traseului de îngrijire”), în Italia, *navigatore sanitario* („navigator sanitar”) sau *navigatore del percorso di cura* („navigator al traseului de îngrijire”), în Portugalia, *navegador de saúde* („navigator de sănătate”), în țările nordice și alte părți ale Europei, *care coordinator* („coordonator de îngrijire”) sau *case manager* („manager de caz”). Termenul de *patient navigator* se folosește în Marea Britanie, Germania sau Olanda.

Odată cu diversificarea serviciilor medicale și creșterea necesității de a oferi un tratament orientat către pacient, rolul *navigatorului* este tot mai important. Terminologia de multe ori inaccesibilă, greu de înțeles, dar și necesitatea abordării mai multor specialiști în bolile oncologice sau cronice generează o comunicare și o relaționare ineficiente între medici, pacienți și aparținători. Diagnosticale grave, adesea nefavorabile pacienților, îi copleșesc atât pe ei, cât și familiile, neștiind în ce direcție să se orienteze, ce medici să consulte și care este ordinea firească a investigațiilor și a tratamentelor în parcursul terapeutic. Într-un asemenea context, existența unei activități precum cea de *navigator* este pe deplin justificată, alături de alți profesioniști (psihologi, asistenți sociali, de îngrijire paliativă, consilieri etc.), în cazul cărora abilitățile de comunicare sunt esențiale.

Într-un articol publicat recent pe pagina <https://romania.europalibera.org> (accesat la 30.09.2025), Monica Althamer, formator în cadrul programului postuniversitar dedicat navigatorilor de pacienți și coordonator al programului NaviCare al Fundației Filantropice „Metropolis” (program funcțional din martie 2025), explică într-un limbaj accesibil ce presupune această meserie. În esență, navigatorul de pacienți nu intră în conflict cu medicul specialist, nu i se substituie, ci își oferă ajutorul pentru ca pacientul să-și cunoască drepturile legate de sănătate, diagnostic, tratamente, investigații etc.

O sferă de activitate destul de apropiată de a *navigatorului medical* este *turismul medical*, prin intermediul căruia pacienților români li se oferă accesul la servicii medicale în străinătate, iar celor străini în România. Un *navigator* este un „liant”, o persoană de legătură între medicul curant și pacient, un fel de *sfătuitor* sau *consilier*, direct interesat de vindecarea pacientului ori, în cazuri extreme, de prelungirea vieții sau ameliorarea stării lui de sănătate. El traduce informațiile medicale pe înțelesul pacientului. Navigatorul deține abilități de comunicare și inteligență emoțională, fiind capabil să îi vorbească și să-i ofere pacientului explicații simple legate de rezultatele analizelor, posibile tratamente, efecte adverse ale căilor terapeutice, etapele și frecvența curelor medicale.

Dicționarele medicale românești de specialitate nu înregistrează sintagma *navigator de pacienți/ navigator medical*, în schimb, anumite protocoale pentru serviciile de suport psihologic oferite pacienților oncologici și publicate online includ termenul și îl detaliază. Întâlnim în schimb un alt cuvânt din sfera medicală, învechit, dar tot un anglicism, acela de *nursă* „femeie care se dedică îngrijirii copiilor bolnavi; infirmieră, soră” (engl. *nurse*) (<https://dexonline.ro/definitie/nurs%C4%83/definitii>, accesat la 13.07.2025). Termenul pare cel puțin bizar în expresia *nursă navigatoare* pentru *asistentă navigatoare*: „Protocol servicii de consiliere de tipul «nursei navigatoare» pentru persoanele cu teste pozitive: În cele ce urmează voi face referire la publicații care au ca și temă centrală activitatea *navigatorului de pacienți* în situația pacientelor cu rezultate pozitive la testele HPV” (<https://www.potisaprevii.eu/wp-content/uploads/2021/05/Anexa-7-Protocolul-de-srijin-suport.pdf>, p. 5, accesat la 15.07.2025).

Cuvântul *nursă*, denumind anterior asistenta medicală, este „considerat astăzi a fi un termen mai puțin sofisticat, preferat de generația mai tânără. Dacă *nursa* poate fi adecvată pentru feminin, cum se va forma masculinul, din moment ce o posibilitate ar fi *nursoi* – un termen foarte controversat având conotații cu siguranță peiorative.” (Sfetea, 2010: 201, trad. n.). Totuși, *nursa* este o formă bizară adaptată în vocabularul limbii române, rar utilizată cu sensul de „asistentă medicală”

sau „bonă”. În legătură cu acest substantiv se află cuvântul *nurserie* (din engl. *nursery*), acea secție a maternității dedicată nou-născuților (i.e. neonatologie). *Nursingul* aparține aceleiași familii lexicale și se referă la activitatea de îngrijire a bolnavilor: sintagma *nursingul bolnavilor* sună destul de ciudat în comparație cu *îngrijirea bolnavilor* (Andronache, Andreescu, 2018: 46).

Un dicționar medical online accesat pentru verificarea existenței termenilor vizați în această lucrare citează atât substantivul feminin *nursă* (din engl. *nurse* și *to nurse* „a avea în grija sa, a îngriji”), cât și forma gerunzială utilizată nominal *nursing*:

Anglicism cu circulație internațională, recomandat și de OMS pentru desemnarea ansamblului atribuțiilor profesionale ale asistentei medicale. *Nursingul* cuprinde toate activitățile care implică responsabilitatea *nursei*: îngrijirea metodică a pacientului conform unor procedee tehnice adecvate, care au drept scop recuperarea sănătății, prevenirea complicațiilor, ca și rezolvarea problemelor particulare fiecărui pacient, de ordin psihologic sau social. *Nurșa* își asumă în echipa medicală responsabilități proprii, esențiale pentru reușita tratamentului specific al bolii, inițiat de medic (<http://amac.md/Biblioteca/data/26/01/Vocabular/Dictionar-de-Termini-Medicali.pdf> (*sine anno et sine nomen*), p. 676, accesat la 15.07.2025).

În protocolul citat se apelează și la o variantă de substantiv verbal ce denumește activitatea: „programele de *navigație*”, sintagmă care invocă mai degrabă celelalte terminologii, mai puțin pe cea medicală. În același protocol sunt rezumate principiile activității de navigare a pacientului.

Navigarea medicală este o modalitate de a furniza servicii de asistență medicală orientate spre pacient. Rolul său este de adaptare continuă a pacientului în sistemul medical. Activitatea presupune o anumită *traietorie*, de la locuința personală la contextul sanitar responsabil de diagnosticarea unei probleme de sănătate și prescrierea unui tratament. *Traseul* implică ulterior reabilitarea, supraviețuirea și se încheie la sfârșitul vieții. Navigarea ajută la integrarea unui sistem fragmentat de asistență medicală pentru fiecare pacient pe fondul unei îngrijiri adesea întrerupte (îndeosebi în cazul bolnavilor cronici). Principala funcție a navigării pacienților este aceea de a îndepărta barierele pentru îngrijirea în timp util pe toate segmentele de continuum ale asistenței medicale. Se stabilește astfel o relație unică între navigator și pacient.

Navigarea pacientului trebuie clar delimitată în privința rolului și a responsabilităților sale de alți specialiști din sistemul sanitar ori de alți furnizori de servicii medicale. Un deziderat ar fi acela al integrării sale în echipa de asistență medicală pentru asigurarea beneficiilor maxime pentru pacient. Persoana responsabilă să navigheze ar trebui aleasă în directă relație cu nivelul de abilități necesare acestui proces. „*Spectrul de*

navigație” cuprinde servicii oferite de navigatori instruiți sau profesioniști, cum sunt asistenții medicali și sociali. Sistemul de îngrijire a pacientului necesită delimitarea momentului de debut al navigării și al celui terminal.

Navigarea pacienților este necesară în cazul sistemelor neconectate de îngrijire (locuri de îngrijire primară și terțiară), activitatea având scopul de a conecta sistemele de asistență medicală. Sistemele de navigație pentru pacienți reclamă coordonare, atribuirea unui *coordonator de navigație* fiind obligatorie dacă sistemele de îngrijire a pacienților sunt mai extinse (<https://www.potisaprevii.eu/wp-content/uploads/2021/05/Anexa-7-Protocolul-de-sprijin-suport.pdf>, p. 6-7, accesat la 17.07.2025).

Pe lângă *navigatorul de pacienți*, o profesie „emergentă” în ultimii ani în România, terminologia medicală curentă vehiculează și alte cuvinte ori sintagme din domeniul serviciilor private de îngrijire, care nu și-au găsit deocamdată corespondentul în limba română și nici nu sunt consemnate în dicționare. Este cazul lui *conciERGE doctor*, un medic personal, la dispoziția pacientului⁵, care își desfășoară activitatea într-un serviciu premium de tip *conciERGE medical*.

Termenul *conciERGE* este de origine franceză și înseamnă „îngrijitor”, de obicei al unui bloc sau al unui hotel, fiind sinonim cu „administrator, portar, recepționar, ușier”⁶. Etimologia trebuie însă căutată în franceza veche, unde sintagma *comte des ciERges*, tradusă literalmente drept „conte al lumânărilor”, trimite spre o persoană responsabilă cu întreținerea lumânărilor (asigurând iluminatul) sau cu alte sarcini administrative dintr-un castel ori palat. În timp, cuvântul a evoluat, modificându-și sensul prin extindere: desemnează un angajat al unui hotel (de lux), al unui imobil sau o persoană care prestează servicii, oferind ajutor personal, sfaturi ori informații, făcând rezervări etc. În zilele noastre, ideea de *conciERGE* duce spre un serviciu de lux. Așadar, un *conciERGE doctor* este un medic personal dedicat, aflat la dispoziția pacientului, oferindu-i servicii personalizate de îngrijire și scutindu-l de toată birocrația și timpii mari de așteptare din sistemul de stat.

Un *conciERGE medical* se ocupă de latura organizatorică a serviciilor medicale, iar pacientul beneficiază de acces imediat la medici renumiți și experimentați. Există așa-numitele pachete premium furnizate

⁵ „Medicul va fi disponibil pentru consultații regulate și va fi la dispoziția pacientului pentru a discuta orice probleme medicale sau de sănătate (investigații de tip screening, sfaturi privind stilul de viață, activitatea sportivă, modalități de a preveni anumite afecțiuni specifice etc.)”. Vezi <https://enayatiomedicalcity.ro/blog/abonamentele-conciERGE-medical-un-beneficiu-real-pentru-angajati/>, accesat la 30.07.2025.

⁶ Vezi explicațiile furnizate de <https://context.reverso.net/traducere/franceza-romana/conciERGE> și <https://www.thefreedictionary.com/ConciERGE+service>, accesate la 31.07.2025.

într-o clinică sau un spital privat bine cotate. Asemenea *sistemului de navigare*, vizează ghidarea pacientului (analize, investigații, tratamente, spitalizare), comunicarea cu medicii specialiști, dar și asigurarea transportului medical, asistență pentru pacienții străini (de pildă, traducere și cazare), gestionarea dosarelor medicale pentru a nu întrerupe îngrijirea, asistarea pacientului după tratament (control și reabilitare).

Abonamentele din gama *conciERGE medical* sunt tot mai des întâlnite în România (mai ales la nivel corporativ pentru angajați VIP), referindu-se la „un serviciu inovativ de îngrijire medicală, ce pun accent pe rezolvarea problemelor medicale eficient și se axează pe o relație apropiată între medic și pacient” (<https://enayati-medicalcity.ro/blog/abonamentele-conciERGE-medical-un-beneficiu-real-pentru-angajati/>, accesat la 30.07.2025). Ele pot funcționa și în cadrul serviciilor de turism medical.

Serviciul medical de tip *conciERGE* pare similar într-o mare măsură celui de *navigator*, întrucât se bazează pe ideea de ghidare și acompaniament al pacientului, dreptul la o a doua opinie și existența unui *conciERGE doctor* care monitorizează tot parcursul medical până la finalizarea tratamentului, prelucrând toate informațiile, astfel încât ele să poată fi înțelese de pacient. Un *conciERGE doctor* „este **prietenul medical** (s.n.) al pacientului, el integrează și pune cap la cap informațiile medicale existente până la momentul respectiv, descoperă care este starea generală a pacientului și stabilește un status al acestuia și îl *consiliază* despre investigațiile pe care ar trebui să le facă ulterior” (<https://www.forbes.ro/conceptul-revolutionar-de-conciERGE-medical-5-motive-pentru-care-sa-alegi-acest-serviciu-premium-283363>, accesat la 31.07.2025).

ConciERGE doctorul este ușor accesibil, fiind implicat direct în diagnosticarea și tratarea corespunzătoare a pacientului, dar și în prevenție. Prin *conciERGE-ul medical* se asigură asistență medicală și logistică personalizată pacientului, dar nu și tratament, acesta coordonând și simplificând tot parcursul medical. Ce poate diferenția un *conciERGE doctor* de un *navigator de pacienți* este partea financiară implicată: în medicina de tip *conciERGE*, pacientul încheie un acord de asistență medicală și plătește o taxă (lunară) pentru a beneficia de diferite servicii medicale (consultații, teste de laborator, investigații CT/ RMN, proceduri de recuperare). *Navigatorul de pacienți* își oferă de cele mai multe ori serviciile în mod gratuit, fiind un profesionist acreditat din rândul medicilor sau al aparținătorilor unui bolnav oncologic, uneori pacient vindecat de cancer dornic să ajute sau pur și simplu o persoană empatică la suferința semenilor. Un *conciERGE doctor* lucrează cu mai puțini pacienți, utilizând frecvent *telemedicina*. Un *navigator de pacienți* își desfășoară de obicei activitatea în organizații non-guvernamentale și nu este remunerat.

Anglicisme necesare ori de lux? Posibile echivalente în limba română

Chiar dacă tendința de globalizare lingvistică în limbajul specializat nu poate fi contestată, ne punem adesea întrebarea dacă

termenii împrumutați mai ales din engleză nu pot fi înlocuiți prin sinonime, fără a fi neapărat nevoie de calchiere, ci doar apelând la diferite sintagme în română, întrucât echivalarea printr-un singur lexem este practic imposibilă. Prin urmare, am putea găsi mai multe variante de traducere pentru *navigator de pacienți*. Cea dintâi opțiune este simplă și concisă, reprezentând tot o sintagmă: *ghid medical* (pentru pacienți). Primul lexem cuprinde ideea de orientare a pacientului în sistemul medical. A doua variantă ar fi *consilier medical/ consilier pentru pacienți*, termeni specifici unui limbaj instituționalizat, care sugerează ideea de sprijin personalizat (emoțional și informațional). Doar că aici intervine riscul de a-l confunda cu un „consilier psihologic” ori „asistent social”.

Apoi, pentru că expresia *nursă navigatoare* ori *asistentă navigatoare* ni se pare totuși forțată și nefirească în limba română, am propune o soluție de compromis, chiar dacă sună „mai tehnic”, prin care să se păstreze substantivul nume de agent *asistent(ă)*, i.e. *asistent de orientare medicală*. Sau un termen mai descriptiv, cu conotații sociale, *asistent de sprijin pentru pacienți*, din care să reiasă accesul la serviciile medicale și la resursele necesare. Tot așa cum avem și un *profesor de sprijin* pentru elevii cu nevoi speciale.

Mai potrivit într-un registru formal și trimitând în mod natural spre acțiunea de a îndruma (pe aceeași linie cu *a orienta*, *a ghida*), sugerăm și varianta *îndrumător medical* sau *îndrumător pentru pacienți*. Sau *asistent de parcurs medical*, o variantă mai sugestivă, dar neobișnuită, pe care au preluat-o și alte limbi (vezi supra). Un alt echivalent, ocurent deja în sfera medicală și socială, ar putea fi *coordonatorul medical* sau *coordonatorul de caz* (în engleză *case coordinator*). Ori *coordonator de îngrijire a pacientului*, posibil adecvat într-un context clinic ori managerial. Întrucât „navigarea” înseamnă parcurgerea unui drum și a unor etape, poate că o altă opțiune de traducere ar fi *coordonator de parcurs medical* (al pacientului), deși prezintă dezavantajul lungimii: prea multe cuvinte pentru a surprinde o realitate medicală.

Cât privește cealaltă meserie denumită prin *conciERGE doctor*, relativ nouă și ea, preluată tot din sistemul american de îngrijire medicală personalizată, nu avem o traducere standardizată în limba română. Termenul nu se regăsește nici măcar în *Inventar de cuvinte și sensuri noi atestate în mediul online* (Barbu et alii, vol. I, 2020; vol. II, 2022), unde sunt consemnate foarte multe cuvinte din varii subdomenii medicale. Dacă ne raportăm la context și la diferite nuanțe, putem găsi niște variante funcționale și pentru *conciERGE doctor*: 1. *medic personal*, sintagmă clară, precisă, dar confundabilă cu „medic de familie”, ceea ce nu este cazul; 2. *medic dedicat*, termen „mai tehnic” folosit îndeosebi în medii private, accentuând ideea de personalizare și exclusivitate (consultația/ examinarea durează chiar și o oră, nu 10-15 minute); 3. *medic conciERGE*, prin care ne apropiem de original, dar într-o formă hibridă,

atipică; este un termen prezent mai ales în clinicile private, interesate de branding și de a oferi pacienților servicii medicale de top, diferențiindu-se de orice concurență; 4. *medic personal dedicat*, cea mai potrivită variantă, sugerând disponibilitatea imediată pentru consultații, recomandări, tratamente și urmărirea îndeaproape a evoluției medicale a pacientului, deci o relație individualizată, unde numărul pacienților este restrâns.

Cât privește sintagma *medic dedicat*, suntem cumva în zona „falșilor prieteni” (*false friends*), întrucât calificativul *dedicat* nu este cel mai potrivit în acest context (în engleză, verbul *to dedicate* are următoarele accepții: „a dedica (versuri, o carte, o melodie)”, „a consacra (timp, viața)”, iar adjectivul *dedicated* înseamnă: „convins”; „dedicat, devotat, loial”; „entuziast, pasionat”; „specializat”; „consacrat”).

Concluzii

Deși unele variante de traducere propuse par mai conforme cu tradiția lexicală românească de a reda concepte străine, nicio formulare nu reușește să surprindă complexitatea și expresivitatea ocupației denumite *navigator de pacienți*. Cu atât mai mult cu cât anumite echivalente sunt prea lungi. Nemaivorbind de *conciERGE doctor*, a cărui denumire este un exemplu de încrucișare a termenilor din două limbi. Un dezavantaj major: pacienților le va fi greu să apeleze la astfel de sintagme când au de-a face cu sistemul medical.

Adoptarea continuă de termeni specializați din engleza britanică și americană este inevitabilă, întrucât apar noi profesii, se descoperă tehnici și procedee inovatoare, pentru că se alocă mai multe fonduri cercetării în această zonă, iar împrumuturile lexicale și calcurile lingvistice nu pot fi respinse în totalitate. Medicina este o știință aflată într-o permanentă schimbare, se publică foarte multe studii bazate pe o bibliografie scrisă predominant în engleză, de aici și importul terminologic. Trebuie evitate barbarismele, dar găsite variante acceptabile de traducere, lingviștii având un rol important în acest sens. O posibilă soluție ar reprezenta-o „ghidurile terminologice medicale”, așa cum subliniază Iulia Cristina Frînculescu, ele trebuind „să reflecte consensuri terminologice, naționale și internaționale, care să expună diferențele între diversele utilizări ale termenilor medicali, unitățile lexicale, semantice și structurile gramaticale care trebuie evitate și să justifice alegerea termenilor privilegiați” (2009: 30).

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ChatGPT și dificultățile conjugării românești: o analiză critică

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ChatGPT and the Challenges of Romanian Verb Conjugation: A Critical Analysis

Abstract:

This study investigates the accuracy of ChatGPT in conjugating Romanian verbs of the fourth conjugation, focusing on those endings that are particularly sensitive to morphological variation: *-ui*, *-ăi*, *-âi*, *-ări*, and *-ăni*. A corpus of 728 verbs was compiled and systematically tested by requesting the conjugation of each verb in the present indicative. The results reveal a heterogeneous performance: while ChatGPT correctly conjugates verbs with stable paradigms (e.g., verbs in *-âi*), it shows significant limitations when dealing with variable or less frequent forms (e.g., verbs in *-ări* and *-ăni*). Overall, only about one-third of the verbs were conjugated entirely correctly. The errors identified follow recurrent patterns, such as the overgeneralization of the *-esc* suffix, the omission of consonants in the stem, and lexical confusions caused by analogies with high-frequency verbs. These findings demonstrate that ChatGPT tends to favor productive and frequent patterns, but fails to capture the morphological nuances of Romanian grammar. Although the model may serve as a useful auxiliary tool for practicing regular paradigms, the study concludes that its use in grammar teaching requires a critical and carefully supervised approach to prevent the reinforcement of incorrect forms.

Keywords: ChatGPT, Romanian language, verb conjugation, fourth conjugation, grammatical accuracy, morphological variation, language teaching, artificial intelligence

1. Introducere

Integrarea tehnologiilor digitale în educație are o istorie de peste cincizeci de ani, primele încercări vizând chatbotii, sistemele de tutorat inteligent și programele de corectare automată a erorilor încă din anii '70. Cu toate acestea, amploarea și vizibilitatea acestui fenomen au crescut considerabil abia în ultimul deceniu, odată cu dezvoltarea inteligenței artificiale generative, capabilă să producă răspunsuri aproape umane și să fie accesibilă unui public larg, fără a necesita competențe tehnice avansate. În acest sens, progresele recente au remodelat strategiile de predare și modalitățile de învățare, generând atât oportunități, cât și provocări pentru profesori și studenți. Chatbotii educaționali de nouă generație, precum ChatGPT, se bazează pe

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procesarea limbajului natural (NLP), învățarea automată (ML) și învățarea profundă (DL), ceea ce le permite să ofere un input lingvistic variat și autentic, condiție fundamentală pentru succesul procesului de achiziție lingvistică (Kohnke *et alii*, 2023). Dintr-o perspectivă critică, Stockwell (2024) observă că profesorii care resping aceste instrumente riscă să fie dezavantajați în raport cu cei care caută modalități de integrare etică și eficientă în procesul educațional.

În domeniul corectării gramaticale, ChatGPT a fost evaluat extensiv. Fang *et alii* (2023) au arătat că modelul excelează prin fluență și capacitate de detectare a erorilor, însă are tendința de supracorectare și întâmpină dificultăți în contexte ce presupun coerență la nivel de text. Într-un alt studiu, Kuznietsova & Kulakova (2024) au demonstrat potențialul integrării ChatGPT în predarea gramaticii, subliniind beneficii precum interactivitatea și implicarea studenților, dar și limitele legate de acces și costuri. Alsaweed & Aljebreen (2024) au raportat o acuratețe ridicată (peste 90%) în corectarea formelor verbale, a acordului subiect-verb și a ordinii cuvintelor, dar performanțe moderate sau scăzute la timpuri verbale și articole. Aceste constatări sugerează că, deși ChatGPT constituie un instrument promițător, performanțele sale trebuie testate riguros în fiecare limbă, mai ales în acele zone ale gramaticii unde complexitatea flexionară este ridicată.

În cazul limbii române, o astfel de complexitate flexionară se regăsește în mod pregnant în sistemul verbal al limbii române. Clasificarea tradițională a verbelor se face pe baza sufixului de infinitiv, criteriu care delimitează patru conjugări: *-a*, *-ea*, *-e* și *-i/-î*. Conjugarea a IV-a, definită prin sufixul de infinitiv *-i* (mai rar *-î*), se remarcă prin diversitate tipologică: include verbe moștenite din latină, dar și numeroase împrumuturi neologice, ceea ce explică variațiile flexionare. Din punct de vedere morfologic, această conjugare se caracterizează prin alternanțe de radical, prezența sau absența augmentului¹ *-esc* în formele de prezent și conjunctiv, fenomene de sincretism între persoane verbale.

GALR (2005: 550) propune împărțirea conjugării a IV-a în trei subclase flexionare:

- **subclasa a IV-a:** cuprinde verbele cu sufix de infinitiv [*-i*], sufix de prezent [*-Ø*] și omonimia desinențială III singular indicativ prezent = III plural indicativ prezent: *a acoperi* (*el acoperă* = *ei acoperă*), *a contribui* (*el contribuie* = *ei contribuie*);

¹ În literatura de specialitate, elementele flexionare *-esc* (specifice conjugării a IV-a) și *-ez* (specifice conjugării I) au fost desemnate prin termeni precum *sufix*, *desinență*, *interfix*, *infix* sau *augment*, însă studiile recente tind să prefere ultima denumire, aceea de **augment**. Vezi Boioc Apintei & Nicolae, 2019.

- **subclasa a V-a:** cuprinde verbele cu sufix de infinitiv [-*i*], sufix de prezent [-*Ø*] și omonimia desinențială I singular indicativ prezent = III plural indicativ prezent: *a adormi* (*eu adorm = ei adorm*);
- **subclasa a VI-a:** cuprinde verbele cu sufix de infinitiv [-*i*], sufix de prezent [-*esc*, -*ești*]: *a citi* (*eu citesc, tu citești, el citește, ei citesc*), *a tăgădui* (*eu tăgăduiesc, tu tăgăduiești, el tăgăduiește, ei tăgăduiesc*).

Particularitatea conjugării a IV-a constă în alternanța dintre formele cu augment -*esc* și formele fără augment. Această variație morfologică, bine documentată în lucrările normative, poate constitui o provocare pentru modelele de inteligență artificială, fiind un indicator relevant pentru evaluarea competenței gramaticale a ChatGPT în limba română. Studiul de față își propune să investigheze în ce măsură ChatGPT conjugă corect verbele de conjugarea a IV-a care prezintă această alternanță, printr-un studiu de caz. Verificarea acurateței cu care ChatGPT reproduce aceste paradigme va oferi o perspectivă relevantă asupra potențialului său didactic și asupra limitelor sale ca instrument de învățare a gramaticii românești.

2. Metodologie

Pentru a evalua acuratețea cu care ChatGPT reproduce paradigmele de conjugare specifice verbelor românești de conjugarea a IV-a, am construit un corpus de analiză format din **728 de verbe** alese după criteriul terminației la infinitiv (-*ui*, -*ăi*, -*âi*, -*ări*, -*ăni*)². Selectarea acestor terminații nu este întâmplătoare, ele fiind deosebit de sensibile la variații flexionare, fie prin menținerea unui tipar unitar, fie prin coexistența unor forme paralele în uzul actual.

Analiza preliminară a corpusului a permis clasificarea verbelor în trei categorii majore, corespunzătoare tiparelor identificate în literatura de specialitate:

- Prima categorie, cea mai numeroasă, include **509 verbe** (aproximativ 70%) care utilizează augmentul -*esc* la prezent, încadrându-se astfel în modelul de prezent slab caracteristic subclasei a VI-a. Acest model este marcat de sincretismul persoanei I singular cu persoana a III-a plural (***eu pietruiesc / ei pietruiesc***) și presupune prezența augmentului la persoanele I-III singular și III plural: *eu pietruiesc, tu pietruiești, el pietruiește, noi pietruim, voi pietruiti, ei pietruiesc*.

² Corpusul de 728 de verbe a fost utilizat anterior pentru comunicarea *The Variation -esc/-Ø at Present Indicative of 4th Conjugation Romanian Verbs. A Normative Analysis based on DOOM3*, susținută în cadrul Colocviului Internațional „Comunicare și cultură în România europeană”, ediția a XIII-a, Universitatea de Vest din Timișoara, 13–14 iunie 2025.

- A doua categorie reunește **188 de verbe** (circa 26%) care nu folosesc augmentul *-esc* și care păstrează un prezent tare, specific subclasei a IV-a. Acestea se definesc prin sincretismul III singular = III plural (*el ronțăie / ei ronțăie*), iar o parte dintre ele manifestă și sincretismul I singular = II singular (*eu contribui / tu contribui*), trăsătură tradițională a conjugării tari.

- În fine, a treia categorie, alcătuită din **31 de verbe** (4,13%), se caracterizează printr-o variație între cele două tipare, fiind atestate atât forme cu augment (*-esc*), cât și forme fără augment (*-Ø*). Această categorie reflectă existența unei variații morfologice active, ceea ce o face deosebit de relevantă pentru testarea comportamentului unui model lingvistic bazat pe inteligență artificială.

Experimentul a fost realizat prin intermediul ChatGPT (versiunea 5), în luna septembrie a anului 2025. Pentru fiecare set de 50 de verbe din corpus a fost adresat modelului un prompt standardizat, formulat explicit astfel: „*Conjugă la indicativ prezent următoarele 50³ de verbe: (sunt enumerate verbele de conjugat)*”. Această uniformizare a solicitărilor are rolul de a elimina variațiile care ar putea fi induse de diferențe de formulare și de a permite compararea rezultatelor. Răspunsurile generate de ChatGPT au fost apoi confruntate cu formele normative consemnate în *Dicționarul ortografic, ortoepic și morfologic al limbii române* (DOOM³).

Evaluarea a urmărit nu doar concordanța dintre formele oferite de model și cele prescrise de normă, ci și identificarea tipurilor de erori. Acestea au fost notate în funcție de persoana verbală la care se manifestă, pentru a observa dacă modelul întâmpină dificultăți recurente în anumite poziții ale paradigmei (de exemplu, persoana I singular sau persoana a III-a plural, unde intervine frecvent augmentul).

Pe baza acestor observații, s-a calculat gradul de acuratețe general, exprimat ca procent al verbelor corect conjugate raportat la totalul corpusului, dar și gradul de acuratețe specific pentru fiecare dintre cele trei categorii (verbe cu augment, verbe fără augment, verbe oscilante). În acest fel, cercetarea urmărește să determine nu doar performanța globală a ChatGPT în raport cu conjugarea a IV-a, ci și modul în care modelul se adaptează la variația internă a acestei conjugări, oferind un tablou mai nuanțat asupra potențialului său ca instrument didactic în predarea gramaticii românești.

³ Pentru a controla efectul formulării promptului, am folosit două setări: (i) solicitare în bloc: „*Conjugă la indicativ prezent următoarele 50 de verbe: [listă]*” și (ii) solicitare singulară – „*Conjugă la indicativ prezent verbul X*”. Rezultatele au fost convergente: de pildă, pentru verbul **a jupui** (normativ DOOM3: *eu jupoi, tu jupoi, el/ea jupoaie, noi jupuim, voi jupuiți, ei/ele jupoaie*), ChatGPT a conjugat greșit în ambele setări.

3. Analiza rezultatelor

Evaluarea răspunsurilor generate de ChatGPT pentru cele 728 de verbe din corpus a urmărit trei obiective principale: stabilirea gradului de acuratețe general, identificarea distribuției erorilor în funcție de tiparul flexionar (prezent slab, prezent tare, variație) și descrierea tipurilor de abateri față de norma gramaticală.

3.1. Evaluarea conjugării verbelor terminate în -ui

Evaluarea conjugării verbelor terminate în -ui, aparținând conjugării a IV-a, s-a realizat pe baza celor **412 verbe** inventariate în DOOM³. Acestea se împart în trei tipare flexionare distincte: verbe cu augment -esc (339 de unități, ≈ 82%), verbe fără augment, încadrate în prezentul tare -Ø (60 de unități, ≈ 15%) și verbe oscilante, pentru care sunt atestate atât forme cu augment, cât și fără augment (13 unități, ≈ 3%).

3.1.1. Gradul de acuratețe general

La nivel global, ChatGPT a reușit să ofere o conjugare integral corectă, conformă cu norma DOOM³, pentru **91 de verbe** (≈ 22% din corpus). Din 321 de conjugări incorecte (≈ 78% din corpus), în 293 de cazuri (≈ 71%), modelul a redat doar parțial alternanța -esc/-Ø, aplicând-o la persoanele I și a II-a singular, dar generalizând augmentul -esc la persoana I singular și persoana a III-a plural. Așadar, au fost identificate 28 de verbe (≈ 7 %) pentru care conjugarea a prezentat erori evidente sau forme incorecte.

Verbe cu terminația -ui	Număr de verbe	Conjugări corecte	Conjugări incorecte	Acuratețe (%)
Cu augment (-esc)	339	67	272	19,76
Fără augment (-Ø)	60	24	36	40
Variație (-esc/-Ø)	13	0	13	0
Total	412	91	321	22,09

3.1.2. Distribuția erorilor în funcție de tiparul flexionar

Rezultatele demonstrează o performanță inegală în raport cu cele trei categorii morfologice.

- **Verbele cu augment (-esc)** au fost tratate în general corect, dar modelul a manifestat tendința de a privilegia constant forma cu augment, chiar și acolo unde norma admite doar varianta fără -esc.
- **Verbele fără augment (-Ø)** au generat cele mai multe abateri, întrucât ChatGPT a aplicat greșit paradigma cu -esc, ceea ce arată că modelul preferă tiparul slab, mai frecvent și mai productiv.
- **Verbele oscilante (-esc/-Ø)** au reprezentat o sursă suplimentară de dificultate: modelul nu a reușit să redea variația, optând de regulă pentru forma cu augment sau alternând între forme neconsistente.

Această distribuție sugerează că ChatGPT posedă o „intuiție” lingvistică orientată către modelul dominant (-esc), dar întâmpină

dificultăți atunci când trebuie să recunoască și să aplice regulile mai puțin frecvente sau instabile.

3.1.3. Tipologia abaterilor de la norma gramaticală

În cadrul erorilor identificate, se disting mai multe tipuri de abateri:

1. **Suprageneralizarea augmentului -esc:** ChatGPT a produs forme inexistente în normă, de tipul *eu *îngăduiesc* în loc de *eu îngădui*. Acest tip de eroare apare mai ales la verbele cu prezent tare.

2. **Confuzii morfologice interne:** de exemplu, în cazul verbului *a pricinui*, modelul a generat forma incorectă *eu *pricinuești*, prin transferul terminației specifice persoanei a II-a singular (*-ești*) la persoana I singular. De altfel, toate formele flexionare ale acestui verb sun greșite din cauza eliminării lui *-i* din rădăcină: *noi *pricinim*, *voi *priciniiți*, *ei/ele *pricinuesc* în loc de *pricinuim*, *pricinuiți*, *pricinuiesc*.

3. **Variante libere neacceptate normativ:** la verbele *a constitui*, *a destitui*, *a reconstitui*, *a restitui*, ChatGPT a admis forme precum *eu constitui* / *eu *constitu*, deși norma permite exclusiv forma cu *-ui*.

4. **Confuzie lexicală prin atracția unui verb de frecvență ridicată:** verbul rar *a pui* a fost substituit cu paradigmele lui *a pune* (*el pune* în loc de *el puiește*).

5. **Alterarea radicalului:** verbul *a jupoi* a fost greșit conjugat ca *eu *jupui*, *tu *jupui*, *el *jupuie*, *ei *jupuie* în loc de formele corecte *eu jupoi*, *tu jupoi*, *el jupoaie*, *ei jupoaie*.

3.1.4. Interpretare

Rezultatele obținute evidențiază un grad de acuratețe general moderat, cu performanțe ridicate doar pentru o parte a corpusului. Distribuția erorilor arată că ChatGPT reproduce mai ușor paradigmele dominante (*-esc*), dar întâmpină dificultăți considerabile la prezentul tare și la verbele aflate în variație. Abaterile tipice confirmă tendința de suprageneralizare și vulnerabilitatea modelului la confuzii analogice sau lexicale.

3.2. Evaluarea conjugării verbelor terminate în -ăi

Inventarul DOOM³ consemnează **126 de verbe** terminate la infinitiv în *-ăi*, repartizate în cele trei categorii morfologice: verbe cu augment *-esc* (51 de unități, $\approx 40\%$); verbe fără augment *-Ø*, cu prezent tare (65 de unități, $\approx 51,6\%$) și (3) verbe oscilante, cu forme atestate atât cu augment, cât și fără augment (10 unități, $\approx 7,9\%$).

3.2.1. Gradul de acuratețe general

Rezultatele conjugării generate de ChatGPT pentru aceste verbe indică o acuratețe globală moderată. Din totalul de 126 de unități, **82 de verbe** au fost corect conjugate în toate cele șase persoane, ceea ce reprezintă $\approx 65\%$ din corpus.

Verbe cu terminația -ăi	Număr de verbe	Conjugări corecte	Conjugări incorecte	Acuratețe (%)
Cu augment (-esc)	51	26	25	50,98

Fără augment (-ø)	65	56	9	86,15
Variație (-esc/-ø)	10	0	10	0
Total	126	82	44	65,08

3.2.2. Distribuția erorilor în funcție de tiparul flexionar

Performanța modelului variază considerabil între cele trei categorii de verbe:

- **Verbele cu augment (-esc):** Din cele 51 de unități, doar **26** au fost corect conjugate, ceea ce arată că ChatGPT întâmpină dificultăți în reproducerea completă a paradigmei slabe. Tendința de eroare constă fie în omiterea augmentului acolo unde este obligatoriu, fie în aplicarea lui incorectă la persoane unde norma cere -Ø.

- **Verbele fără augment (-Ø):** Rezultatele sunt semnificativ mai bune. Din cele 65 de unități, **56** au fost corect conjugate, ceea ce indică faptul că ChatGPT reușește să redea cu mai multă acuratețe prezentul tare, caracterizat de sincretismul persoanelor I singular = III singular și III singular = III plural (*eu moșai / tu moșai, el suie / ei suie*).

- **Verbele oscilante (-esc/-Ø):** Cele 10 unități din această categorie nu au fost redactate corect de ChatGPT. Modelul nu a produs niciodată o paradigmă dublă, cu alternanță acceptată între cele două tipare, ci a optat pentru o singură variantă (cea cu -esc), ignorând variantele libere consemnate de DOOM³.

3.2.3. Tipologia abaterilor

Analiza calitativă a erorilor arată trei tendințe majore:

1. **Suprageralizarea augmentului -esc:** modelul a aplicat augmentul în contexte în care norma prevede forme fără augment, ceea ce confirmă preferința sa pentru tiparul slab, perceput ca dominant.

2. **Inconsistența în cadrul paradigmei:** unele verbe au fost conjugate corect la persoana I singular, dar incorect la plural, ceea ce arată că ChatGPT nu reușește să mențină consecvența regulii pe tot parcursul flexiunii.

3. **Ignorarea variației libere:** la verbele oscilante (ex. *a behăi, a dupăi, a orbecăi*), ChatGPT a preferat o singură paradigmă (cu -esc), fără a reproduce coexistența celor două forme atestată de norma actuală.

3.2.4. Interpretare

Rezultatele pentru verbele terminate în -ăi conturează o imagine complexă: pe de o parte, modelul reușește să redea corect o parte semnificativă a paradigmelor (65%), în special la verbele cu prezent tare, unde regula este mai stabilă; pe de altă parte, întâmpină dificultăți notabile în cazul verbelor cu augment și, mai ales, al celor oscilante, unde nu surprinde flexibilitatea sistemului românesc. Aceste constatări susțin ideea că ChatGPT privilegiază regulile mai productive și mai frecvent întâlnite în corpusurile de antrenament, dar este vulnerabil în fața excepțiilor și a zonelor de variație activă.

3.3. Evaluarea conjugării verbelor terminate în -âi

Conform DOOM³, inventarul verbelor terminate la infinitiv în -âi cuprinde **58 de unități**, repartizate în două categorii: verbe cu augment -esc (2 unități, $\approx 3,4\%$) și verbe fără augment, cu prezent tare -Ø (56 de unități, $\approx 96,6\%$). Niciun verb din această clasă nu prezintă variație dublă (-esc/-Ø), ceea ce indică o stabilitate morfologică mai ridicată față de alte terminații flexionare.

3.3.1. Gradul de acuratețe general

Rezultatele conjugării generate de ChatGPT arată o performanță relativ ridicată: toate cele **56 de verbe** cu prezent tare au fost conjugate corect, fără apariția augmentului, ceea ce confirmă o bună internalizare a paradigmei normative. Problemele au apărut exclusiv la cele 2 verbe cu augment (*a hâi* și *a hâșâi*), pe care ChatGPT le-a tratat ca verbe regulate cu prezent tare, eliminând augmentul obligatoriu. Astfel, acuratețea generală se situează la $\approx 96,6\%$ (56 din 58 de verbe sunt corect conjugate).

Verbe cu terminația -âi	Număr de verbe	Conjugări corecte	Conjugări incorecte	Acuratețe (%)
Cu augment (-esc)	2	0	2	0
Fără augment (-Ø)	56	56	0	100
Variație (-esc/-Ø)	-	-	-	-
Total	58	56	2	96,55

3.3.2. Distribuția erorilor în funcție de tiparul flexionar

- **Verbele fără augment (-Ø):** ChatGPT a redat corect toate cele 56 de unități, confirmând caracterul stabil al acestei paradigme.
- **Verbele cu augment (-esc):** În cazul celor două verbe (*a hâi* și *a hâșâi*), conjugarea a fost realizată incorect, modelul producând forme de tipul *eu *hâi*, *tu *hâi*, *el *hâie*, *ei *hâie* în locul formelor corecte *eu hâiesc*, *tu hâiești*, *el hâiește*, *ei hâiesc*. Un tipar similar s-a observat și la *a hâșâi*, unde ChatGPT a furnizat *eu *hâșâi*, *tu *hâșâi*, *el *hâșâie*, *ei *hâșâie* în locul paradigmei normative cu augment (*eu hâșâiesc*, *tu hâșâiești*, *el hâșâiește*, *ei hâșâiesc*).

3.3.3. Tipologia abaterilor

Abaterile observate pot fi grupate în două categorii:

1. **Eliminarea augmentului obligatoriu:** ChatGPT a tratat verbele cu -esc ca și cum ar aparține prezentului tare, ceea ce reflectă o tendință de simplificare și uniformizare a paradigmelor.
2. **Confuzii de distribuție a augmentului:** lipsa augmentului la persoanele I singular și III plural, unde acesta este prevăzut normativ, denotă o insuficiență diferențiere a modelului între tiparul slab și cel tare.

3.3.4. Interpretare

Rezultatele sugerează că, pentru verbele terminate în -âi, ChatGPT are o performanță globală foarte bună, dar numai datorită faptului că marea

majoritate a acestor verbe aparțin paradigmei stabile, fără augment. Dificultățile apar exclusiv la cele două verbe cu -esc, unde modelul nu a reușit să redea paradigma normativă, preferând o schemă analogică simplificată. Acest comportament confirmă faptul că ChatGPT funcționează mai bine în zonele de regularitate ridicată, dar nu reușește să surprindă fenomenele marginale și rare din cadrul conjugării românești.

3.4. Evaluarea conjugării verbelor terminate în -ări

Conform inventarului DOOM³, clasa verbelor terminate la infinitiv în -ări cuprinde **72 de unități**, dintre care 68 urmează tiparul flexionar cu augment (-esc), 3 păstrează prezent tare (-Ø: *a răsări*, *a sări*, *a tresări*), iar un verb (*a zgândări*) prezintă variație acceptată între cele două tipare (-esc/-Ø). Această distribuție arată integrarea majoritară a terminației -ări în subclasa a VI-a (prezent slab) și prezența marginală a excepțiilor (prezent tare, respectiv variație) în cadrul conjugării a IV-a.

3.4.1. Gradul de acuratețe general

Evaluarea conjugărilor generate de AI pentru toate cele 72 de verbe în -ări indică o acuratețe globală **0%**. Deși modelul a aplicat augmentul la toate verbele (inclusiv acolo unde norma nu îl prevede), el a produs sistematic o eroare de structură a radicalului, eliminând consoana -r- înainte de secvența cu -e/-i- (ex.: *a călări* → *eu *călăesc*, *tu *călăești*, *el *călăește*, *noi *călăim*, *voi *călăiți*, *ei *călăesc* în loc de formele corecte *călăresc*, *călărești*, *călărește*, *călărim*, *călăriți*, *călăresc*).

Verbe cu terminația -ări	Număr de verbe	Conjugări corecte	Conjugări incorecte	Acuratețe (%)
Cu augment (-esc)	68	0	68	0
Fără augment (-Ø)	3	0	3	0
Variație (-esc/-Ø)	1	0	1	0
Total	72	0	2	0

3.4.2. Distribuția erorilor pe tipare flexionare

- **Verbele cu augment (-esc):** toate au fost marcate greșit prin ștergerea lui -r- din radical, la toate persoanele: *călărim*, *călăriți*, nu **călăim*, **călăiți*.
- **Verbele fără augment (-Ø):** au fost conjugate tot cu augment, ceea ce contravine modelului tare (ex.: *răsar/sar/tresar* au primit forme cu -esc).
- **Verb cu variație (-esc/-Ø):** *a zgândări* a fost fixat pe tiparul cu augment și, în plus, afectat de aceeași eliminare a lui -r-, nereflextând posibilitatea normativă de alternanță (-esc/-Ø).

3.4.3. Tipologia abaterilor față de normă

1. **Eliminarea sistematică a consoanei radicale -r-** la contactul cu augmentul sau sufixele personale (*călăr-* → *călă-*),

generând serii de forme inexistente normativ (ex.: *călăesc, *călăești, *călăește; *călăim, *călăiți, *călăesc).

2. **Suprageneralizarea augmentului -esc** în contexte de prezent tare (verbele *a răsări*, *a sări*, *a tresări*), unde norma indică absența augmentului.

3. **Nerespectarea variației admise (-esc/-Ø)** la *a zgândări*, prin fixarea pe un singur tipar și concomitentă simplificare a radicalului.

3.4.4. Interpretare

Rezultatele indică un pattern de eroare unitar: ChatGPT privilegiază schema cu augment, dar o aplică analogic-simplificator, suprimând *-r-* din radical, ceea ce invalidează întreaga paradigmă chiar și acolo unde augmentul este obligatoriu. În consecință, performanța nu e limitată la alegerea tiparului (-esc vs -Ø), ci la realizarea corectă a radicalului în contact cu morfemele de prezent. Modelul generalizează o regularitate percepută (frecvența mare a -esc la *-ări*), dar pierde fidelitatea morfologică fină (păstrarea lui *-r-* în *călăr-* / *tipăr-* / *urmăr-* etc.).

3.5. Evaluarea conjugării verbelor terminate în *-ăni*

Inventarul DOOM³ înregistrează **60 de verbe** terminate la infinitiv în *-ăni*, repartizate în trei categorii morfologice: 49 de unități (≈ 82%) cu augment -esc (subclasa a VI-a), 4 unități (≈ 6,6%) fără augment, cu prezent tare -Ø (subclasa a IV-a) și 7 unități (≈ 11,6%) cu variație dublă (-esc/-Ø), oscilând între cele două paradigme.

3.5.1. Gradul de acuratețe general

Testarea conjugării la indicativ prezent a arătat că ChatGPT aplică în mod uniform augmentul -esc tuturor celor 60 de verbe, indiferent de categoria normativă. Cu toate acestea, în toate cazurile conjugarea este incorectă, întrucât modelul elimină consoana *-n-* din radical atunci când adaugă terminațiile de prezent. Astfel, de exemplu, *a hrăni* este conjugat de model ca *eu *hrăesc*, *tu *hrăești*, *el *hrăește*, *noi *hrăim*, *voi *hrăiți*, *ei *hrăesc*, în locul formelor corecte *hrănesc*, *hrănești*, *hrănește*, *hrănim*, *hrăniți*, *hrănesc*. Rezultă, prin urmare, un grad de acuratețe general de **0%**.

Verbe cu terminația <i>-ăni</i>	Număr de verbe	Conjugări corecte	Conjugări incorecte	Acuratețe (%)
Cu augment (-esc)	49	0	68	0
Fără augment (-Ø)	4	0	3	0
Variație (-esc/-Ø)	7	0	1	0
Total	60	0	2	0

3.5.2. Distribuția erorilor în funcție de tiparul flexionar

- **Verbele cu augment (-esc):** toate cele 49 de verbe au fost conjugate cu eliminarea consoanei -n-, ceea ce invalidează întreaga paradigmă.

- **Verbele fără augment (-Ø):** și acestea au fost tratate de ChatGPT ca verbe cu -esc, deci conjugate greșit (de exemplu, *a bocăni* → *eu bocănesc* în loc de *eu bocănesc* sau *eu bocăn*).

- **Verbele cu variație (-esc/-Ø):** niciunul dintre cele 7 verbe nu a fost redat conform cu dubla paradigmă acceptată de normă; toate au fost forțate pe schema cu -esc, dar cu radical alterat.

Această uniformizare greșită arată că modelul preferă o regulă analogică simplificată (augment + radical scurtat), ignorând diversitatea reală a tiparelor.

3.5.3. Tipologia abaterilor

Erorile identificate se grupează în trei tipuri principale:

1. **Eliminarea sistematică a consoanei -n-** în toate persoanele, ceea ce duce la forme inexistente în normă (ex.: *hrănesc* → **hrănesc*).

2. **Suprageneralizarea augmentului -esc**, aplicat chiar și la verbe cu prezent tare sau variabil, unde norma nu îl prevede.

3. **Neglijarea variației morfologice:** verbele oscilante nu sunt redade cu dubla posibilitate (-esc/-Ø), ci doar cu schema greșită, simplificată.

3.5.4. Interpretare

Rezultatele confirmă un tipar eronat și constant: ChatGPT conjugă toate verbele în -ăni după un model analogic unic, eliminând -n- din radical și adăugând augmentul -esc. Această strategie simplificatoare sugerează că modelul a „dedus” un tipar productiv artificial, probabil pe baza unor regularități parțiale din corpusurile de antrenament, dar care nu corespunde normei gramaticale.

4. Tipologia erorilor identificate în conjugarea verbelor

Analiza celor 728 de verbe incluse în corpus a arătat că doar **229 de unități (≈ 31,5%)** au fost corect conjugate de ChatGPT, în timp ce 499 de verbe (≈ 68,5%) au prezentat abateri de la norma gramaticală. Rezultatele diferă semnificativ în funcție de categoria flexionară:

- la **verbele cu augment (-esc)**, doar 93 din cele 509 unități au fost redade corect (≈ 18,3%), ceea ce confirmă dificultățile majore întâmpinate de model în reproducerea paradigmei slabe;

- la **verbele fără augment (-Ø)**, performanța este semnificativ mai ridicată, cu 136 de verbe corecte din 188 (≈ 72,3%);

- în schimb, la **verbele cu variație (-esc/-Ø)**, ChatGPT nu a reușit să redea corect nicio unitate (0%).

Categoria de verbe	Număr de verbe	Conjugări corecte	Conjugări incorecte	Acuratețe (%)
Cu augment (-esc)	509	93	416	18,3
Fără augment (-ø)	188	136	52	72,3
Variație (-esc/-ø)	31	0	31	0
Total	728	229	499	31,5

Aceste cifre arată că modelul preferă regulile mai simple și mai frecvente (prezentul tare), dar eșuează sistematic acolo unde există variație și instabilitate. Pentru a înțelege mai bine natura erorilor, am realizat o clasificare tipologică a abaterilor observate. Analiza răspunsurilor generate de ChatGPT arată că erorile nu apar la întâmplare, ci urmează câteva tipare recurente, care pot fi considerate caracteristice pentru modul în care modelul procesează morfologia limbii române:

1. Una dintre cele mai frecvente greșeli este **supragereneralizarea augmentului -esc**. Modelul tinde să aplice această terminație chiar și la verbele care, în norma gramaticală, se conjugă cu prezent tare. În loc de *eu contribui*, ChatGPT produce forme precum *eu contribuesc*, construite prin analogie cu tiparul dominant.

2. Un al doilea tip de eroare este legat de **ignorarea variației morfologice**. În cazul verbelor oscilante, unde norma admite atât forme cu augment, cât și forme fără augment, ChatGPT alege invariabil o singură paradigmă (de regulă, cea cu -esc), pierzând astfel specificul dublu al conjugării. Astfel, verbe precum *a zgândări* sunt prezentate doar în forma *zgândăresc*, fără coexistența corectă a formei alternative *zgândăr*.

3. Un alt fenomen semnalat frecvent este **eliminarea consoanelor finale din radical**. La clasele de verbe terminate în -ări și -ăni, ChatGPT simplifică radicalul prin suprimarea consoanelor -r- sau -n-. Astfel, în loc să redea formele corecte *călăresc* sau *hrănesc*, modelul oferă variante inexistente în normă, precum **călăesc* sau **hrăesc*.

4. Situația opusă apare la verbele rare cu augment obligatoriu, unde modelul manifestă tendința de **eliminarea a augmentului** și conjugă aceste verbe ca și cum ar aparține paradigmei tari. Așa se explică formele reduse *eu *hâi* sau *eu *hășâi*, în locul variantelor corecte *eu hâiesc* și *eu hășâiesc*.

5. La acestea se adaugă o serie de **confuzii morfologice interne**, prin care terminațiile specifice unei persoane verbale sunt transferate greșit la alta. Cazul cel mai evident este cel al verbului *a pricinui*, unde ChatGPT a generat forma *eu *pricinuești*, aplicând desinența de persoana a II-a singular la persoana I singular.

6. Nu lipsesc nici situațiile de **alterare a radicalului**, când modelul produce forme deformatate, prin schimbări nepermise ale structurii lexicale. De exemplu, verbul *a jupoi* a fost redat ca *eu *jupui*, în loc de forma normativă *eu jupoi*.

7. În fine, există și **confuzii lexicale determinate de frecvența verbelor**. Aici, ChatGPT asociază un verb rar cu paradigma unuia foarte uzual, după asemănarea formală. Exemplul cel mai sugestiv este cel al verbului *a pui*, confundat cu *a pune*, ceea ce a dus la forme incorecte de tipul *el *pune* în loc de *el puiește*.

Dincolo de clasificarea formală a erorilor, analiza relevă câteva tendințe clare în modul în care ChatGPT procesează conjugarea verbelor românești din conjugarea a IV-a. Mai întâi, se observă că modelul preferă să aplice regulile cele mai productive și frecvent întâlnite, în special augmentul *-esc*. Această preferință conduce la o serie de suprageneralizări, prin care verbe cu prezent tare sau cu variație sunt forțate să se conformeze tiparului slab. Astfel, se conturează o „regularizare” artificială a paradigmelor, care, deși conferă coerență internă răspunsurilor, intră în contradicție cu norma gramaticală.

O a doua tendință este aceea de a simplifica radicalii verbali atunci când aceștia interacționează cu sufixele de prezent. Fenomenul este vizibil în special la verbele terminate în *-ări* și *-ăni*, unde consoanele *-r-* și *-n-* sunt sistematic eliminate, rezultând forme inexistente în uzul normativ. Această eroare nu afectează doar o persoană verbală izolată, ci întreaga paradigmă, ceea ce demonstrează că modelul aplică o regulă analogică globală, dar greșită.

De asemenea, se remarcă vulnerabilitatea modelului în fața excepțiilor și a verbelor rare. În asemenea cazuri, ChatGPT recurge la analogii cu verbe de mare frecvență sau transferă terminații între persoane, ceea ce generează confuzii. Exemple precum *eu pricinuești* sau substituirea lui *a pui* cu *a pune* ilustrează această strategie de compensare prin analogie.

În ansamblu, interpretarea acestor rezultate arată că ChatGPT posedă o „intuiție” lingvistică orientată către regularitate și frecvență, dar care nu reușește să surprindă nuanțele și variațiile reale ale sistemului flexionar românesc. Din perspectivă didactică, acest fapt confirmă utilitatea sa ca instrument de sprijin pentru consolidarea regulilor generale, dar și necesitatea unei utilizări critice, însoțite de verificări constante în sursele normative, pentru a evita fixarea unor forme eronate.

Concluzie

Studiul de față a avut ca obiectiv verificarea acurateței cu care ChatGPT conjugă verbele românești de conjugarea a IV-a, cu terminațiile sensibile la variație flexionară: *-ui*, *-ăi*, *-âi*, *-ări* și *-ăni*. Analiza celor 728 de verbe incluse în corpus a evidențiat un tablou eterogen: performanța modelului variază semnificativ de la o categorie la alta, fiind mai bună în cazul paradigmelor stabile și mult mai slabă acolo unde există variație sau excepții.

În ansamblu, **doar aproximativ o treime dintre verbe au fost conjugate integral corect**, ceea ce arată că, deși ChatGPT poate reda

forme normative, competența sa este limitată și selectivă. Modelul excelează în zonele cu regularitate ridicată, dar nu reușește să surprindă nuanțele și oscilațiile reale ale sistemului flexionar românesc. Astfel, deși ChatGPT poate constitui un instrument auxiliar valoros în predarea limbii române, rezultatele subliniază importanța unei utilizări critice și controlate a instrumentelor de inteligență artificială atunci când este vorba despre gramatică. În lipsa unei verificări critice, ChatGPT riscă să devină un generator de erori; utilizat însă cu discernământ, el poate fi transformat dintr-o sursă de confuzie într-un sprijin real pentru predarea și învățarea limbii române.

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Anglicisme din domeniul educației, învățământului și cercetării

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Anglicisms in the Field of Education, Teaching and Research

Abstract:

Entitled *Anglicisms in the field of education, teaching and research*, the article aims to address aspects that present the dynamics of these borrowings in the lexicon of the Romanian language, as reflected at the level of academic dictionaries, as well as in that of specialized studies, highlighting the elements of novelty, the permanent influx of new borrowings from the sphere of education in the lexicon of the Romanian language, which contribute to the creation of an internationalized vocabulary. The study then focuses on the concept of *gamification* which represents an element of novelty in the lexicon of the Romanian language, being present in the teaching and learning process, in articles, conferences, various activities; the entry of the word is verified in the dictionaries of the Romanian language and then the presence in different texts in order to analyze the impact of the term.

Keywords: Anglicisms, Romanian language lexicon, education, gamification, globalization

Domeniul educației, cercetării și învățământului românesc poartă amprenta influenței engleze ca multe alte domenii, urmând același *pattern* cultural și lingvistic. Ca *lingua franca* a zilelor noastre, engleza reprezintă o punte de comunicare și cunoaștere între culturi și un aspect definitoriu în educația tinerelor generații. Engleza este omniprezentă în comunicarea din cadrul diferitelor domenii științifice, tehnice, tehnologice, de afaceri și de divertisment, fapt pentru care nu mai e percepută doar ca o limbă străină, ci, în primul rând, ca o competență indispensabilă succesului academic și profesional. Majoritatea tinerilor încep studiul acesteia încă din ciclul primar, iar instituțiile de învățământ și de cercetare acordă o importanță deosebită obținerii certificatelor lingvistice recunoscute la nivel internațional, Cambridge, TOEFL sau IELTS. Această tendință reflectă nevoia de a avea competențe lingvistice care să permită accesul la oportunități academice și profesionale

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internaționale. În școlile și universitățile românești, învățarea limbii engleze s-a transformat dintr-o opțiune suplimentară într-o necesitate, programele de studiu integrate, curricula adaptate și disciplinele predate exclusiv în limba engleză devenind o realitate a învățământului și cercetării românești în mai toate domeniile. Această tendință este susținută de accesul la resurse internaționale, publicații, articole științifice și cursuri *online*, care asigură accesul la standardele și rezultatele pregătirii academice de la nivel global. De asemenea, colaborarea universităților și institutelor de cercetare din România cu cele din străinătate presupune și *workshopuri*, conferințe, programe de masterat sau de doctorat susținute în limba engleză. Această practică atrage nu doar studenți români, ci și pe cei internaționali, contribuind la diversificarea mediului academic.

Influența limbii engleze în educația românească are impact și asupra modului în care elevii și studenții își dezvoltă gândirea critică, capacitatea de comunicare și accesul la oportunități internaționale de studiu și de angajare. Competențele lingvistice de limbă engleză, dobândite la un nivel avansat reprezintă un criteriu de selecție pentru burse și mobilități Erasmus, *internshipuri* internaționale și locuri de muncă în companii multinaționale. Astfel, engleza nu doar facilitează comunicarea la nivel internațional, ci contribuie activ la dezvoltarea competențelor de integrare ale tinerilor într-o societate interconectată și competitivă. Aceasta generează și permanente provocări din punct de vedere lingvistic: adaptarea la un curriculum bilingv, evitarea folosirii în exces a anglicismelor și cultivarea identității lingvistice românești într-un context care predispune la estomparea acesteia. Astfel, limba engleză reprezintă prima interfață pe care o presupune contactul elevului, studentului, cercetătorului cu inovația, cu actuala dinamică a cunoașterii în domeniile de interes, modelându-i capacitatea de reprezentare și racordându-l la cerințele educaționale și profesionale ale unei lumi globalizate.

Prezența limbii engleze în domeniul educației și al cercetării de la noi se transpune și într-o serie de împrumuturi recente în limba română, vehiculate în cadrul orelor de la clasă, al orelor *online*, în cadrul cursurilor universitare, în lucrări, în proiecte sau granturi de cercetare.

Adriana Stoichițoiu Ichim, în lucrarea *Vocabularul limbii române actuale. Dinamică, influențe, creativitate*, Editura All, București, 2001 selectează, pentru domeniul învățământului, ca anglicisme cu statut de *împrumuturi necesare* motivate denotativ sau stilistic *grant* și *master*, precizând următoarele:

Grant este utilizat în română cu un sens mai restrâns decât cel consemnat în BBC (p. 488) – „sumă de bani acordată de guvern unei persoane sau organizații într-un anumit scop, de exemplu pentru studii sau repararea locuinței”. Termenul a pătruns recent în terminologia învățământului și a cercetării pentru

a desemna modalități de finanțare, specifice, altele decât cele desemnate prin cuvântul bursă („ajutor bănesc acordat de stat, de o instituție, de o persoană particulară etc. unui elev sau unui student pentru a se întreține în timpul studiilor”, DN, p. 163). În *Buletinul nr. 3* (septembrie 1996) editat sub egida Ministerului Învățământului, anglicismul *grant* apare în programele de studii aprofundate și doctorat: „*Grantul* reprezintă o sumă de bani nerambursabilă acordată unui cercetător individual, echipe de cercetare, institut de cercetare pentru realizarea, într-o perioadă de timp determinată, a unei activități de cercetare științifică sau a unei activități conexe activității științifice” (p. 3); „Programul oferă și posibilitatea de acordare a unor *granturi* individuale doctoranzilor cu rezultate și posibilități majore” (p. 49).

Master, atestat în engleză în sintagmele *Master of Arts* și *Master of Science*, care desemnează absolvenți ai învățământului superior artistic și socio-uman – în primul caz –și al celui științific – în al doilea caz (cf. BBC, p. 687), este folosit în terminologia românească de specialitate mai rar cu sensul din engleză („Programul este destinat obținerii titlului de *master* într-o universitate din SUA”) și mai frecvent cu semnificația termenului *master* din franceză, consemnată în PL (p. 638), ca echivalent al sintagmei *studii aprofundate* (de specializare): „Admiterea în ciclul de studii aprofundate (*master*) în ASE București va începe la 18 septembrie”. Pentru a evita ambiguitatea pe care o poate genera utilizarea termenului *master* cu ambele sensuri, considerăm necesară adoptarea perechii *masterat* (prin analogie cu *doctorat*) „perioada de studii după obținerea licenței”, echivalent cu studii aprofundate, și *master* „titlul obținut la absolvirea ciclului respectiv de învățământ”. Un exemplu de utilizare corectă a celor doi termeni (a căror adoptare ni se pare justificată de circulația internațională a anglicismului *master*) se găsește în următorul anunț: „Programul de *masterat* în economie Goteborg se va finaliza prin obținerea titlului de *master* în economie al acestei instituții de învățământ”¹.

În *Dicționarul ortografic, ortoepic și de punctuație*, ediția a II-a, 2005, (DOOM²), din seria anglicismelor care țin de domeniul educației, învățământului și al cercetării, găsim înregistrat: **afterschool** (engl.) [pron. *aftărskul*] (desp. *after-school*) s. pl. *afterschooluri* [pron. *aftărskulur*]; **background** (engl.) [pron. *becgraund*] (back-ground) s. n., pl. *backgrounduri*; **brainstorming** (engl.) [pron. *breinstorming*] (brain-) s. n.; **briefing** (engl.) [pron. *brifing*] (brie-) s. n., pl. *briefinguri*; **CV** (engl.) [cit. *sivi*] s. n., art. *CV-ul*; pl. *CV-uri*; **!feedback** (engl.) [pron. *fidbec*] (feed-) s. n., pl. *feedbackuri* (-ba-ckuri); **job** (engl.) [pron. *ğob*] s. n., pl. *joburi*; **know-how** (engl.) [pron. *nauhau*] s. n., art. *know-how-ul*; **management** (engl.) [pron. *meniğment/manağment*] s. n.; **master**¹ (absolvent de masterat) s. m., pl. *masteri*; **master**² (masterat) s. n., pl. *master*; **on-line/online** (engl.) [pron. *onlain*] loc. adj., loc. adv.; **print** s. n., pl. *printuri*; **printa** (a-) vb., ind. prez. 3 *printează*; **site** (spațiu pe internet) (engl.) [pron. *saît*] s. n., art. *site-ul*; pl. *site-uri*; **training** (instruire) (engl.) [pron. *treîning*] s. n., art. *trainingul*; iar *Dicționarul ortografic, ortoepic și de punctuație*, ediția a III-a, 2021, (DOOM³)

¹ Pentru mai multe explicații vezi și Adriana Stoichițoiu Ichim, *Aspecte ale influenței engleze în româna actuală*, Editura Universității din București, 2006.

înregistrează și **grant** s. n., pl. *granturi* alături de multe alte împrumuturi recente din limba engleză, completând seria anglicismelor cu elemente lexicale ca: **coach** (engl.) [pron. *kăuĉ*] s. m., art. *coach-ul* [pron. *kăuĉul*], **coaching** (engl.) [pron. *kăuĉing*] s. n., art. *coachingul* [pron. *kăuĉingul*], **deadline** (engl.) [pron. *dedlăin*] s. n., pl. *deadline-uri* [pron. *dedlăinur²*], **e-learning** (engl.) [pron. *ilărning*] s. n., art. *e-learningul* [pron. *ilărningul*], **internship** (engl.) [sh pron. *ș*] s. n., pl. *internshipuri*, **networking** (engl.) [pron. *netăorking*] s. n., art. *networkingul*, **webinar** (engl.) [w pron. *ŭ*] s. n., pl. *webinare, workshop*.

Chiar dacă unele dintre elementele selectate s-au regăsit inițial într-un alt domeniu, cum ar fi cel al afacerilor sau al informaticii, totuși au fost adoptate și frecvent utilizate în domeniul educației și al cercetării de către toți cei implicați în diferite activități specifice domeniului.

Un sector prolific din punctul de vedere al împrumuturilor recente din limba engleză în domeniul educației îl reprezintă cel al metodelor interactive de predare, al jocurilor și al diferitelor instrumente de lucru implicate în procesul de predare-învățare. Un termen la modă, care este vehiculat în activități conexe cu procesul de educație, este *gamification*. Conceptul, lansat inițial în domeniul comerțului, deschide o paletă largă de utilizări, fiind folosit ca termen recent în domeniul educației, în cel tehnologic, dar și în cel al sănătății sau al *fitnessului*.

În domeniul educației:

Prin **gamification** se înțelege procesul de adăugare de mecanici regăsite în jocuri, în împrejurimi care nu sunt relateate jocurilor, cum ar fi un website, o comunitate online, în sistemul managerierii educației ori în business. Scopul **gamification-ului** este de a crește participarea la activități, de a face mai ușoară interacțiunea dintre participanți, angajați și parteneri, pentru a facilita colaborarea și interacțiunea².

Site-ul didacto.ro prezintă conceptul și avantajele folosirii *gamification*-ului în învățarea limbilor străine, evidențiind rezultatele unui studiu de caz axat asupra utilizării *gamificării*. Remarcăm crearea unui dublet *gamification/gamificare* creat prin utilizarea alternativă a împrumutului din limba engleză, *gamification*, cu cel al variantei adaptate la grafia și fonetismul limbii române, *gamificare*. Articolul precizează că noțiunea de *gamification* reprezintă una dintre cele mai recente tendințe în educație, inclusiv în procesul de învățare a limbilor străine, prin care jocul este plasat în centrul procesului de învățare, mecanismele jocurilor și elementele de proiectare a jocului devenind cadrul unor activități care nu sunt considerate în mod tradițional jocuri. Astfel, prin *gamification*, caracteristici ale jocurilor, cum ar fi stabilirea

²<https://gutenberg.ro/gamification-in-educatie-cum-este-vazut-in-romania/> (accesat în 9 ianuarie 2025)

de obiective, elementele distractive sau recompensele, sunt abordate în procesul didactic, pentru a transmite informație, imprimând un anumit dinamism activităților, stimulând participarea și creativitatea cursanților³.

Jorge Francisco Figueroa Flores (2015: 32-54) tratează pe larg avantajele *gamificării* în procesul de învățare a limbilor străine și o prezintă ca metodă de ultimă oră, bazată pe succesul industriei jocurilor, al aportului social media și pe studiile recente de anvergură în domeniul psihologiei. El afirmă că orice sarcină, cerință, obiectiv, proces sau context teoretic pot fi gamificate⁴.

Un material prezentat în cadrul *Conferinței Naționale 7 Ateliere Aletheea*, John Riley, profesor limba engleză și Bogdan Godja, consilier educațional evidențiază faptul că *gamification*-ul presupune utilizarea de elemente și tehnici de tip joc în contexte reale de non-joc, urmărind o implicare sporită a participanților la activitățile de învățare. De asemenea, se face referire la metoda jocurilor ca la o practică devenită tradiție în învățământul românesc, cu precizarea că „aceste tehnici de includere a designului *Gamification* de tip joc în proiectarea curriculară sunt de abia la început în România⁵.

Observăm o tendință de adaptare fonetică și morfologică a termenului la sistemul limbii române, în discursul de specialitate fiind întâlnite sintagmele: *gamificare de conținut* sau *lecții gamificate*⁶ care sunt invocate când se impune un anumit *management* al clasei, necesar aplicării unui design de tip *Gamification*.

Termenul *gamification*, termen recent, așa cum este în fapt și metoda, este vehiculat în cadrul diverselor dezbateri de la noi pe marginea temei invocând necesitatea implementării unei astfel de metode în învățământul românesc pentru a încuraja creativitatea dascălilor și pentru a transforma atmosfera de la clasă într-una favorabilă dezvoltării elevului pe plan cognitiv, comportamental și emoțional. Metoda a apărut din nevoia unei schimbări și a unei conectări mai rapide cu elevii, reprezentând o alternativă la conservatorismul metodelor tradiționale.

În domeniul tehnologic, termenul *gamification* cuprinde o serie de aplicații care pot fi instalate pe telefon, pe *iPad*, antrenând angajații unei firme în competiții care implică acumularea de puncte și de recompense acordate de către manager: „Acest concept este la fel de nou precum *iPad*-ul și a crescut la fel de bine ca acesta din urmă. În întreaga

³ <https://didacto.ro/gamification-in-educatie/> (accesat în 9 ianuarie 2025)

⁴ <https://revistes.ub.edu/index.php/der/issue/view/1109> (accesat în 9 ianuarie 2025)

⁵ <https://aletheea.ro/gamification-in-educatie-managementul-clasei-prin-joc/> (accesat în 10 ianuarie 2025)

⁶ Articolul citat mai sus folosește sintagmele *gamificare de conținut* și *lecții gamificate*.

lume sute de organizații utilizează jocul pentru a-și dezvolta angajații, pentru a-i face să performeze mai mult ca niciodată”⁷.

În domeniul sănătății și al *fitnessului*, de asemenea, sunt folosite aplicații, cum este aplicația *Ensa Sport*, care stimulează clienții și le întreține motivația pentru a participa la programe de sănătate și de sport⁸.

În ceea ce privește prima atestare și apoi definirea conceptului de *gamificare* (ca „utilizarea elementelor specifice jocurilor în contexte care nu sunt jocuri”), termenul a fost inventat de Nick Pelling în 2002 (Deterding, Dixon, Khaled & Nacke, 2011: 9), deși conceptul de aplicare a elementelor de joc în contexte care nu sunt jocuri, cum sunt programele de loialitate și sistemele de recompensare a clienților, există de mai mult timp. Termenul *gamificare* a fost preluat din industria digitală, începe să fie folosit frecvent în 2008, dar devine cunoscut publicului larg abia în 2010, după ce a reușit să înlocuiască termeni paraleli ca: *productivity games*, *surveillance entertainment*, *funware*, *playful design*, *behavioral games*, *game layer* sau *applied gaming*. (Ionuț-Cristian Bâru, *Educație prin gamificare*)⁹. *Gamificarea* este definită de Karl Kapp ca „utilizarea elementelor jocurilor video, esteticii și tehnicilor specifice lor pentru a crește implicarea, a motiva acțiunea, a promova învățarea și pentru a rezolva probleme (Alexandra Daniela Codreanu, *Gamificarea ca strategie de simulare a motivației*)¹⁰.

Dicționarul *Merriem Webster* înregistrează termenul *gamification* (procesul de adăugare a jocurilor sau a elementelor asemănătoare jocului la ceva, cum ar fi o sarcină, pentru a încuraja participarea) și precizează: conceptul de bază al *gamificării* nu este nou, dar cuvântul în sine este o inovație a lexicului de secol XXI a limbii engleze. Cuvântul se referă la încorporarea elementelor de joc, cum ar fi sistemele de puncte și recompense, în sarcini, ca stimulente pentru ca oamenii să participe. Cu alte cuvinte, *gamificarea* constă în transformarea a ceva potențial plictisitor într-un joc. *Gamificarea* este eficientă deoarece valorifică dorințele naturale ale oamenilor pentru competiție și realizare. Profesorii, managerii și alții folosesc *gamificarea* pentru a crește participarea și a îmbunătăți productivitatea. *Gamificarea*

⁷ De pe <https://gadget.ro/cum-ajuta-noua-tehnologie-dezvoltarea-unei-companii-gamification-concept/> (accesat în 12 ianuarie 2025)

⁸ „Aplicația ENSA SPORT: în aplicația noastră vă puteți bucura de următoarele caracteristici: *Gamification* pentru clienți (cu realizări, trofee, provocări colective, clasament etc.) care asigură motivație și loialitate; gestionarea programelor și rezervarea locurilor la clasele colective.” (<https://play.google.com/store/apps/details?id=com.socialgym.ensasportactive&hl=ro>, accesat în 12 ianuarie 2025)

⁹ <https://www.scrd.eu/index.php/scic/article/download/302/266/528> (accesat în 2.03.2025)

¹⁰ <http://dir.upsc.md:8080/xmlui/bitstream/handle/123456789/3002/Conf-Dezv-personala-actori-educationali-2021-p169-173.pdf?sequence=1&isAllowed=y> (accesat în 15.01.2025)

este, de asemenea, adesea o caracteristică esențială în aplicațiile și site-urile *web* concepute pentru a motiva oamenii să îndeplinească provocări personale, cum ar fi obiectivele de slăbire și învățarea limbilor străine; urmărirea progresului este mai distractivă dacă se simte ca un joc¹¹.

Dicționarul Oxford (*gamification*: the use of elements of game-playing in another activity, usually in order to make that activity more interesting¹²) și *Dicționarul Cambridge* (*gamification*: noun, the practice of making activities more like games in order to make them more interesting or enjoyable¹³) înregistrează termenul spre deosebire de dicționarele limbii române, acesta nefiind înregistrat nici în *Dicționarul explicativ al limbii române* (DEX, 2016), nici în *Dicționarul ortografic, ortoepic și morfologic al limbii române*, (DOOM³, 2021), și nici în *Marele dicționar de neologisme* (MDN, 2007).

În limba engleză, cuvântul *gamification* este format prin derivare din cuvântul *game* (rom. „joc”) și sufixul *-ification*, iar limba română preia modelul de derivare, păstrează rădăcina englezească *game* și, în încercarea de a-l adapta, atașează sufixul *-ificare*¹⁴. În limba română, este utilizat destul de frecvent cu grafia și fonetismul din limba engleză, dat fiind că domeniul din care a fost preluat inițial este cel al noilor tehnologii, al dezvoltării de *software*, unde limba engleză este predominantă. Sensul de bază al cuvântului se referă la aplicarea mecanismelor de joc (cum ar fi punctele, nivelele, recompensele sau clasamentele) în contexte care nu sunt, prin natura lor, jocuri, cu scopul de a încuraja interacțiunea, implicarea și motivația. În limba română, *gamification* este utilizat invariabil ca un substantiv cu forma englezească, fără să fie adaptat morfologic. Nu se aplică desinențele specifice de plural din limba română, o posibilă formă de plural adaptat ar putea fi *gamification-uri*, dar este rar folosit). Unii utilizatori încearcă să-l adapteze prin formarea verbului *a gamifica*, cu forma de infinitiv lung *gamificare*. De asemenea, circulă forma de participiu cu valoare

¹¹ <https://www.merriam-webster.com/dictionary/gamification#did-you-know> (accesat în 20 ianuarie 2025)

¹² *Gamification*: utilizarea elementelor de joc într-o altă activitate, de obicei pentru a face acea activitate mai interesantă (https://www.oxfordlearnersdictionaries.com/definition/english/gamification#google_vignette, accesat în 15.09.2025)

¹³ *Gamification*: (substantiv), practica de a transforma activitățile mai mult în jocuri pentru a le face mai interesante sau mai plăcute (<https://dictionary.cambridge.org/dictionary/english/gamification>, accesat în 15.09.2025)

¹⁴ Vezi, de exemplu: *Gamificarea este aplicarea elementelor de design de joc și a principiilor legate de joc în contexte non-jocuri. Această acțiune își propune să implice și să motiveze participanții în vederea atingerii obiectivelor dorite.*

(<https://ahaslides.com/ro/blog/define-gamification/> - Anaslides, accesat în 5.03.2025)

adjectivală, *gamificat*: „construirea unui mediu educațional *gamificat* eficient” (<https://didacto.ro/gamification-in-educatie/>).

Utilizarea cuvântului în discursul din domeniul educației sau în cel publicitar, de afaceri, din domeniul marketingului și managementului are conotație pozitivă în contextul actual, când tehnicile de *gamificare* sunt utilizate pentru a face experiențele mai plăcute și interactive.

Termenul este utilizat în domeniul educației în programele de *e-learning*, unde elevii primesc puncte sau insigne pentru a parcurge anumite module, este folosit pentru a motiva studenții și a îmbunătăți rezultatele de învățare; în marketing și vânzări, unde presupune oferirea de puncte, reduceri sau recompense pentru fidelizarea clienților; în resurse umane și productivitate: în aplicațiile de management personal sau de echipă, *gamificarea* ajutând la creșterea productivității prin tehnici ce recompensează îndeplinirea sarcinilor.

În limba română, *gamification* a fost acceptat în discursul profesional, deși un posibil echivalent ar fi „tehnici de joc”, sintagmă mai puțin utilizată. Se folosește preponderent în contexte tehnice sau academice, iar introducerea sa în vocabularul general ține de popularitatea în creștere a aplicațiilor și platformelor educaționale și profesionale care integrează astfel tehnici. Un alt posibil echivalent românesc propus în studii de specialitate este cel de *ludificare*, din lat. *ludus* (rom. „joc”), variantă mai puțin comună, folosită ocazional în scrieri academice și în traduceri, mai tehnică și, prin urmare, mai greu accesibilă publicului larg: „Concret, educația prin *ludificare* își propune să susțină lecțiile profesorilor în două moduri: în primul rând, prin realizarea unui joc digital inovator, iar în al doilea rând, creând și testând materiale didactice pentru predare.”¹⁵ (Ionuț-Cristian Bâru, *Educația prin gamificare*).

Dintre variantele echivalente, *gamificare* este cel mai frecvent utilizat de către vorbitori în limba română. Dat fiind numărul tot mai mare de vorbitori nativi de limba română care cunosc limba engleză, mulți autori de lucrări de specialitate și vorbitori optează pentru *gamification*, mai ales în domeniile tehnologice și educaționale.

De remarcat și impactul stilistic pe care îl are termenul *gamification* în comunicarea din spațiul virtual, în presa scrisă și audio-vizuală, în titluri, în unele contexte literare moderne, mai ales în cele care explorează teme tehnologice sau educative. În astfel de contexte, termenul atrage atenția datorită caracterului său tehnic, care poartă amprenta inovației, dar și din pricina faptului că este asociat cu ideea de

¹⁵ <https://www.scrd.eu/index.php/scic/article/download/302/266/528>

joc, ceea ce poate sugera energie, interacțiune și modernitate¹⁶. De asemenea, folosirea termenului în anumite contexte face posibilă o asociere cu romanele distopice și de ficțiune speculativă, *1984* de George Orwell, *Feed* de M. T. Anderson, *The Circle* de Dave Eggers etc. care explorează teme legate de tehnologie, control social și influența sistemelor de tip *gamification* asupra societății și vieții individuale, ilustrând foarte bine modul în care sistemele de recompense și control pot influența gândirea, comportamentul și valorile individului într-o societate tehnologizată.

Raportarea la celelalte limbi romanice ne permite să observăm același fenomen ca în limba română, termenul *gamification* a fost împrumutat din limba engleză și adaptat și în limba franceză, italiană sau spaniolă, reflectând influența pe care limba engleză o are în mod constant și în spațiul romanic în domeniile tehnologiei, educației și marketingului. Limbile romanice menționate păstrează termenul original și vehiculează în paralel variante echivalente (fr. *ludification*), respectiv variantele adaptate (sp. *gamificación*, it. *gamificazione*), păstrând înțelesul termenului din limba sursă.

În limba franceză, termenul *gamification* este folosit destul de frecvent, în paralel cu varianta echivalentă *ludification*, care derivă din cuvântul *ludique* (rom. „joc”). Totuși, împrumutul din limba engleză *gamification* este des întâlnit în textele tehnice și în domeniul marketingului:

La ludification, ou *gamification* en anglais, est un terme qui est devenu de plus en plus populaire ces dernières années. Il s'agit d'une méthode utilisée dans divers domaines tels que l'éducation, le marketing, les affaires, la santé, le sport et bien plus encore pour encourager les gens à s'engager dans une activité en la rendant plus amusante et interactive. Cependant, peu de gens savent que le mot «ludification» est en fait la francisation d'un mot anglais qui a été créé en 2002¹⁷.

În limba spaniolă, se folosește atât elementul spaniol *gamificación*, cât și forma originală englezească *gamification*. Varianta *gamificación* este comună și acceptată în context academic și tehnologic:

La *Gamificación* es una técnica de aprendizaje que traslada la mecánica de los juegos al ámbito educativo-profesional con el fin de conseguir mejores resultados, ya sea para absorber mejor algunos conocimientos, mejorar alguna

¹⁶ Vezi, de exemplu, titlul *Gamification în educație*, care captează atenția și impresionează prin noutate, precum și prin posibilitatea pe care o deschide de a face educație interactivă prin intermediul jocului.

¹⁷ <https://gamificationfacile.fr/definition/ludification/origine-ludification/> (accesat în 3.02.2025)

habilidad, o bien recompensar acciones concretas, entre otros muchos objetivos¹⁸.

În limba italiană, anglicismul *gamification* este folosit frecvent, dar există și varianta adaptată *gamificazione*, care este întâlnită mai ales în articolele despre educație și afaceri:

La **gamification** è spesso fraintesa e caricata di aspettative irrealistiche. Molti pensano che significhi semplicemente trasformare qualsiasi attività in un gioco, ma non è così. In realtà, molti sistemi di gamification che integrano tecniche di game design non vengono percepiti dagli utenti come giochi veri e propri¹⁹.

Prezența anglicismelor în domeniul educațional din România reflectă o adaptare la tendințele globale și o nevoie de a integra terminologia internațională în procesul de învățare. Extinderea accesului la resurse educaționale internaționale și utilizarea platformelor *online* (precum Moodle, Google Classroom sau Microsoft Teams) a condus la preluarea unor termeni englezești, deveniți indispensabili. Utilizarea anglicismelor denotă o orientare spre standarde educaționale internaționale, necesare pentru competitivitatea globală. Anglicismele sunt adesea întâlnite în contexte precum *educația STEM*, *managementul educațional* și resursele de formare continuă. Termeni precum *platform*, *login*, *dashboard* sau *tutorial* sunt esențiali pentru integrarea tehnologiei în învățământ și pentru facilitarea procesului educativ. Multe anglicisme sunt adoptate pentru că oferă o descriere mai precisă sau concisă a unor concepte moderne, greu de exprimat în mod direct prin termeni românești. În cursurile de dezvoltare personală și profesională, termeni precum *soft skills*, *pitch*, *mentoring* și *coaching* sunt frecvent utilizați pentru a desemna concepte internaționale adoptate în spațiul nostru.

Impactul anglicismelor în domeniul educațional este unul pozitiv atâta timp cât termenii împrumutați contribuie la uniformizarea vocabularului educațional internațional și permit accesul direct la resurse și metodologii internaționale, favorizând învățarea limbii engleze și adaptarea la o lume globalizată și, de asemenea, înlăturând barierele lingvistice și culturale.

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¹⁸ <https://www.educativa.com/blog-articulos/gamificacion-el-aprendizaje-divertido/> (accesat în 3.02.2025)

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The Role of Social Media in Democratic Societies: from Freedom to Censorship

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Abstract:

The promise of civil liberties lies at the heart of the development of social media in democratic societies. Initially, the effects of social media on the quality of democracy were viewed with enthusiasm: overcoming institutional barriers, reviving democratic citizenship in the digital space, limiting forms of censorship, and establishing a new “agora” that gives citizens a voice. Recent developments, however, show that freedom of information brings numerous risks, opening the way to manipulation and unfair practices. New forms of government control are needed to counter the vulnerabilities of the new communication system. In this article, I analyze the evolving mechanisms through which democratic deliberation is pursued, focusing on how developments in technology and transformations in communication systems influence political decision-making processes that may result in various forms of censorship or limitations on individual freedoms.

Keywords: social media, Populism, censorship, democracy, hybrid media system

Social media and the idea of freedom

The last decades have brought profound transformations in the dynamics of relations at the planetary level. With the fall of communist regimes, a wave of optimism led to the idea of the end of ideologies (Fukuyama, 1992: 323-324), in the sense of imposing Western democracies as a universal model of development. The process of globalization implies an interconnection of communities at an unprecedented level and the imposition of new non-state actors on the world stage (Held, McGrew, Goldblatt, Perraton, 2004: 486-488) and the increasing importance of supra-state actors such as the European Union. Old political structures were put into question, including the redefinition (and limitation) of nation states, the emergence of global citizenship, the broadening of the scope of human rights, the redefinition of cultural identities.

The evolution of digital technology has played an essential role in this process, through easy access to information, the provision of new

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platforms for expression to the general public, along with the development of social media. The Internet has accelerated the speed of information dissemination and opened up new opportunities for interaction between the general public and communication actors.

The promise of absolute freedom of expression brought by new technologies (smartphones and social media) produced a huge sense of optimism: a new wave of democratization and the abolition of dictatorial regimes seemed very likely developments. Numerous revolutionary movements created or supported by online communication in Europe, Asia and Africa fueled this optimism.

Efficiency in audience measurement and preferential targeting of news flows have contributed to major changes in communication. The explosion of Facebook and the development of social media after 2008 have produced other revolutionary changes, in that from that moment on, citizens were simultaneously both consumers and producers of content in public communication (Ghender, 2021: 46). The result has been a hybrid media system, in which information circulates very quickly and freely in various environments, in which the traditional role of the mass media (gatekeeper) of filtering information gives way to a polycentric system. There is a permanent exchange between traditional mass media and social media in which information is constantly taken over, transformed and redistributed. Influencers are emerging as new stars in public communication.

Andrew Chadwick (2017: 5) introduced the concept of the hybrid media system, he argued that political communication today is best understood as an interdependent system where old and new media interact, compete, and coevolve, shaping power relations in society. The hybrid media system is not simply about “*old media*” (traditional press) versus “*new media*” (digital, social media), it is about the way these coexist and interact. The system is hybrid because actors (politicians, journalists, activists, citizens, corporations) use combinations of both old and new media logics. Old media and digital media use different sets of rules which mix and adapt in the hybrid media system. The news dynamics is changing: a viral social media story may push mainstream media to cover an issue, and traditional media coverage may then reinforce its spread online. The hybrid system is dynamic, constantly shifting as technologies evolve, audiences adapt, and actors learn new tactics.

Smrdelj & Pajnik (2025: 7) pointed out that hybridity isn't inherently progressive: hybrid media systems may amplify authoritarian or populist tendencies, reinforce inequalities, enable disinformation, etc. Sometimes hybridity undermines democratic norms, besides the assumption that hybridity is always opening new possibilities.

Paradoxically, however, technological developments have the capacity to act in a double sense: both for free information and for disinformation. Thierry Wolton (2023: 12) has very well noticed this paradox: new communication technologies open the way to freedom in societies under dictatorship, but in democratic societies “*technology becomes an unparalleled instrument of control*”. And, we could add, a tool of manipulation within the reach of political actors or national entities involved in hybrid wars through which they aim to weaken trust in Western governments: there is increasingly consistent evidence showing the involvement of Russia in particular but also of China in such campaigns in the Western space. Thierry Wolton, an author who has deeply analyzed the ideological resources of communist regimes, noted that in the last century political extremes have captured much of the world, also in a context in which changes in technology and economic crises have led to identity crises and major social changes.

The role of algorithms and the capacity of Artificial Intelligence (AI) in directing information flows raised numerous concerns and questions. Do the algorithms according to which an information, person or entity is visible or not work according to transparent criteria? Do media giants have the ability to decisively control the flow of information that further generates currents of opinion? Can media giants or state actors decisively and non-transparently influence citizens’ opinions and further their choices, including at the electoral level? There is much data that confirms the possibility of pessimistic answers to this series of questions. Today, social media and AI can be fertile ground for fake news, manipulation, lies, disinformation (Ghender, 2025: 67).

Despite the initial optimism, new developments seem to confirm the degradation of the climate of democratic debate. Social media often favors radical and aggressive language, intolerant opinions, summary judgments to the detriment of nuanced rational analyses. In the political sphere, populist figures who propose a theme hostile to pluralism and diversity often win: Donald Trump in the USA is the best-known example, announced however by the victory of populist figures in Hungary, Poland, Italy and the very high score obtained in Germany, France and Romania.

Obviously, technology itself – including social media platforms – does not inherently generate positive or negative effects in society; it depends on how it is used and on the dominant political culture within each community. Nevertheless, technological developments encourage certain types of interactions and influence the way people communicate and access information. In this context, recent transformations bring back into focus the issue of citizens’ political culture and their ability to navigate and cope within the digital space.

The quality of democratic debate under discussion

Political scientist Giovanni Sartori (1999: 34-35) considers that democracy pivots between values and facts, between the compromises of reality and the struggle to approach ideals. The etymological definition of democracy that shows that power belongs to the people remains a basic principle regarding the sources and legitimacy of power, “government exists for the people and not vice versa” (Sartori, 1999: 54). In another classic work on democracy, political scientist Robert Dahl (2000: 33-34) proposed another term, polyarchies, which better reflects the difference between the democratic ideal and the realities of power in society. He outlined a set of institutional guarantees for the functioning of polyarchies, a set of freedoms that guarantee a climate of free opinion, the right to association and political participation. In this system, the binomial contestation – participation is essential and differentiates between hegemonic or oligarchic regimes (which nevertheless have apparently democratic institutions) and polyarchies that guarantee citizens’ opportunities to participate in public life and to contest political power (Dahl, 2000: 28-29).

The Western philosophical and political tradition considers pluralism, tolerance and inclusion fundamental to the proper functioning of democracies and an adequate climate of freedom. According to this tradition, individual freedom brings public benefits and represents the basic guarantee of the functioning of democracy. Democratic institutions must be supported by values rooted in society, by a political culture oriented towards pluralism and diversity (Putnam, 2001: 20-21). This intellectual tradition sees individual freedom, democracy and human rights in a relationship of close dependence (Mastellone, 2006: 15-17).

The theoretical tension observed by Sartori between the democratic ideal and political reality is at the heart of analyses of the political phenomenon that reconfigures the space of political communication and competition in democratic societies: populism. These movements start from a sense of fear of accelerated changes and of the threat to traditional identities, considered under siege. The rise of populist parties also comes in the context of the decline in the trust of a significant segment of public opinion in national governments and in the way they deal with successive and sometimes overlapping crises: Covid 19, migrant crises, the war in Ukraine, economic crises. Populist movements take different forms in different societies but have found as a unifying factor the claim to return to an authentic democracy and the will of the people, seriously affected by corrupt elites or international entities. The claim of populist movements to revive authentic democracies and return to the sovereign will of the people (seen as a homogeneous entity) obviously departs from the respect for pluralism considered a fundamental principle of democracies. Throughout the Western world,

political competitions between the political left and the political right have given way to another competition, between traditional and populist political parties.

Cas Mudde & Cristóbal Rovira Kaltwasser (2017: 6) defined Populism as “thin-centred ideology that considers society to be ultimately separated into two homogeneous and antagonistic groups, ‘the pure people’ versus ‘the corrupt elite’, and which argues that politics should be an expression of the *volonté générale* (general will) of the people”. As strategic approach, Kurt Weyland (2001: 14) defined Populism as “a political strategy through which a personalistic leader seeks or exercises government power based on direct, unmediated, uninstitutionalized support from large numbers of mostly unorganized followers”.

Social media and new technologies play a central role in the rise of populist movements, through several fundamental characteristics. The segmentation of public opinion into “information bubbles” based on user references, the erosion of the gatekeeper role played by media institutions, and the increased capacity to produce fake news have eroded the quality of information relevant to democratic debate.

Social media helps populist movements by amplifying their anti-elite message, lowering barriers to communication and mobilization, rewarding emotional narratives, and creating feedback loops with mainstream media. Using social media, populist leaders can bypass traditional gatekeepers, they can speak directly to “the people” avoiding filters of journalists, editors, or established institutions. The logic of social media amplifies emotional and polarizing content, which is an advantage for populist leaders who thrives on “*Us vs. Them*” framing, crisis narratives, and emotional appeals. Also, algorithms on social media platforms like Facebook, TikTok, and X reward engagement, often privileging outrage, fear, and identity-based content. Social media provides cheap, fast tools for mobilizing supporters, organizing protests, and coordinating campaigns without heavy party structures, which represents an advantage for newly formed political parties without territorial bases.

Hashtags, viral videos, and livestreams help frame movements as authentic, grassroots, and people-driven. Populist movements often distrust mainstream media: through YouTube channels, Telegram groups, podcasts, and meme culture, they build parallel media ecosystems that reinforce their narrative and identity. Populist messages that gain traction online can force coverage by traditional media, amplifying their reach. Conversely, controversies covered by TV or newspapers can be re-circulated and reframed by populists online: this is exactly what Chadwick (cited above) describes as the hybrid media system in action.

Although populist movements claim to represent the people and are hostile to foreigners, an international solidarity movement is emerging. In this regard, we are witnessing a transnational diffusion of populist strategies, slogans, and memes across borders through social media, allowing movements to learn from each other.

Some authors believe that we are in a post-truth period, in which the veracity of facts matters less and in which citizens consume a mix of information, fiction, fake news and opinions often unfounded on facts. In a post-truth society, facts matter less than feelings (McIntyre, 2018: 11). People are more likely to accept a claim if it fits their emotions, values, or identity – even if the claim is false (d’Ancona, 2017: 25-27).

Algorithms and AI are increasingly playing a role in controlling the flow of information to citizens, a reality that raises questions about the transparency and fairness of these systems. There is increasing evidence suggesting the involvement of state actors or other entities in electoral campaigns or key events that shape public opinion at important times. The cancellation of the 2024 Romanian presidential election due to image campaigns conducted on social media is a strong signal. A virtually unknown candidate won the election following an aggressive campaign on TikTok, for which he reported zero expenses. Official accusations suggest the involvement of state actors (Russia) who conducted illegal manipulation campaigns by paying opinion leaders (influencers) and manipulating algorithms to increase the candidate’s visibility. The European institutions have launched an investigation on whether TikTok violated EU laws by facilitating the use of paid political advertisements and whether its algorithms unfairly promoted certain political content.

Beyond political and legal aspects, there are several topics of interest for political communication: the possibility of manipulating algorithms and distorting the communication framework; the large space for manipulation and the triggering of a hybrid war; the reduced capacity of public institutions to intervene to stop incorrect practices, especially when events take place in a relatively short time, as is the case with electoral campaigns. The question arises whether the current communication framework in Western societies is truly free, whether democratic debates are truly possible?

Guaranteeing the framework for free expression vs. new forms of censorship

Western societies are faced with a dilemma: building a system of guarantees regarding the fair and transparent practices of media giants (Meta for Facebook, Instagram, ByteDance for TikTok) implies adopting restrictions that can be interpreted as new forms of censorship. The debate is complicated by the fact that beyond the technical aspects,

political interpretations regarding government control over individual freedoms inevitably arise.

US Vice President JD Vance said after the annulment of the Romanian presidential election that Romanian democracy is weak if it can be destabilized with a small amount of money spent on the electoral campaign on TikTok. However, the practices of this platform were also under investigation in the US at the time, where the legislative framework for government control and transparency was developed.

In the following section, I conduct a critical analysis of recent legislative developments in the United States and the European Union, formulated in response to the growing threats to the free framework of democratic debate, with particular attention to the increasing regulatory oversight of social media platforms and their societal impact.

In US, after a long investigation, a special legal framework was created to ensure control over the good practices of the Chinese-controlled company. In 2022, USA banned TikTok from being used, installed, or maintained on federal government devices, in order to prevent potential leaks of data or vulnerabilities via devices owned by government and to reduce risk of foreign surveillance (No TikTok on Government Devices Act). In 2024 Protecting Americans from Foreign Adversary Controlled Applications Act (PAFACA) defines “foreign adversary controlled applications” (explicitly including ByteDance/TikTok) and requires divestment (sale) of TikTok’s U.S. operations. If ByteDance doesn’t divest, TikTok could be banned from app stores and hosting in the U.S. The U.S. government argued that China (via ByteDance) could access U.S. user data, manipulate content, influence users, or be forced by Chinese law to cooperate with the Chinese government/security services.

The US Government’s actions are supported by the justice system. The U.S. Supreme Court has upheld laws requiring ByteDance/TikTok to divest or face ban in the U.S. Courts have rejected arguments from TikTok that such ban laws violate free speech, etc. The courts have generally weighed national security as a compelling governmental interest and found the laws constitutionally permissible under that. The support for the American justice system is noteworthy given that the First Amendment to the American Constitution guarantees freedom of expression:

Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the Government for a redress of grievances.

(The First Amendment to the U.S. Constitution, ratified in 1791 as part of the Bill of Rights)

In this way, legislation that can be described as restrictive with regard to the limitation of the right to free expression actually tries to protect these rights from the interference of private companies. In the era of digital communication, the pluralism of the information media is no longer sufficient to ensure free access to information of general interest (a mandatory condition for freedom of opinion). It is a major challenge for the Western democratic framework. Although the political and judicial systems have formed a common front on this issue, general agreement at the level of American society is far from being achieved: there are numerous voices accusing the authorities of establishing a censorship regime.

The Protecting Americans from Foreign Adversary Controlled Applications Act is complemented by a proposed framework arrangement between the US and China that would allow TikTok to remain operational, but under majority American control and with oversight over the algorithm and user data. Private American investors are set to step in and take control of TikTok in the US.

The U.S. government's actions regarding TikTok have sparked a significant debate over whether such measures constitute censorship. This issue centers on the balance between national security concerns and the protection of free speech.

The European Union has taken less drastic measures, but is concerned with decisions that ensure a fair framework for debate in the digital space. European Union (EU) has implemented several initiatives concerning TikTok, focusing on data privacy, cybersecurity, and compliance with EU regulations. These measures do not constitute an outright ban, like in US, but they reflect significant regulatory actions.

EU adopted legal and regulatory measures, such as Digital Services Act (2023), which obligates platforms to deal with illegal content, disinformation, risks to elections, requires transparency about algorithms, content moderation, advertising, gives users more control over what they see online. EU Commission opened formal proceedings against TikTok for election risks under the DSA (in connection with Romanian presidential elections). For example, in May 2025, Ireland's Data Protection Commission (DPC), acting on behalf of the EU, fined TikTok €530 million for unlawfully transferring European users' personal data to China. The DPC found that TikTok failed to ensure adequate protection of this data, violating the EU's General Data Protection Regulation (GDPR).

As in the US, the European Commission, European Parliament, and EU Council banned TikTok from official devices due to cybersecurity concerns, in 2023. These measures were implemented to protect data and avoid information leakage. We can see that the EU is

taking significant steps to regulate the platform, focusing on data privacy, transparency, and compliance with EU laws.

The European Commission adopted the European Democracy Action Plan in 2020, with the aim of making EU democracies more resilient to digital challenges, disinformation, foreign interference, and threats to media freedom. Its main objectives are: promoting free and fair elections, strengthening media freedom and pluralism, combating disinformation, enhancing civic engagement and citizen participation. In the field of political advertising, the Commission has sought to improve transparency regarding who pays for ads and how they are targeted, as well as to establish mechanisms for electoral resilience through cooperation to detect threats, disinformation, and cyber risks. The Defence of Democracy Package, building on the Democracy Action Plan, aims to reinforce democratic institutions and processes by addressing emerging threats – particularly foreign interference – while also promoting citizen participation and safeguarding free and fair elections.

Conclusions

Through this analysis of recent developments in media and technological ecosystems, I have sought to demonstrate how the accelerating convergence of digital platforms, algorithmic mediation, and political communication has transformed the conditions under which democratic debate takes place. My examination reveals that these transformations, while enabling unprecedented access to information, simultaneously generate new asymmetries of power and control that risk undermining open deliberation. On the basis of these findings, I argue that there is an urgent need for coherent legislative intervention to establish regulatory frameworks capable of safeguarding transparency, accountability, and fairness in the digital public sphere, thereby ensuring the integrity of democratic discourse.

Populist movements are taking full advantage of the global context marked by overlapping crises (health, economic, war) and the favorable context offered by new communication technologies and are experiencing a strong rise. Their presence in the space of political communication is reconfiguring political competition, is shaping the way in which political information is produced and interpreted in Western societies.

There is growing evidence that these recent developments are complicated by the hybrid warfare unleashed by state actors (Russia, China) that seek to undermine the trust of citizens in democratic societies in national and international institutions, such as the European Union and NATO.

The analysis I have carried out on recent events highlights how the new technological capabilities that dominate the logic of social media – big data, algorithms that sort and direct data, the use of AI – bring numerous benefits for users but also major risks. Part of these risks are represented by the ability of some companies or entities to influence the climate of opinion in a non-transparent and illegal way and further to affect the quality of democratic debate.

In this context, the need for special regulations on information management, freedom of information and freedom of expression arises. A tension is thus emerging between the need for protection and security on the one hand and the fear of the reintroduction of more or less subtle forms of control and censorship.

The shift in perspective on social media, from an instrument and promoter of democracy to a potential vulnerability, is contested by a part of society, which is why regulations in the field are met with protests and resistance. The need for government interventions shows the vulnerability of democracies to unexpected challenges.

Further developments will show whether the US government's measures to control the TikTok platform are effective or not, whether they can be reasonably enforced or not. The dynamics of relationships between media systems, citizens and public institutions will also indicate whether the quintessentially free digital space can be regulated without losing the trust of citizens or not.

The complicated situation brings back to the attention of Western societies the issue of political culture and the values that underpin or should underpin the proper functioning of democratic societies, based on open dialogue, pluralism and respect for human rights. Recent debates also show the urgent need to form new skills and competences of citizens in a democratic society.

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Beyond Bread Alone. On Scientism, Work and Culture in Contemporary Education

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Abstract:

The aim of the article is to explore the limitations of relying solely on material comfort, science, or work as the foundation for a meaningful life. Drawing on philosophical and historical perspectives, it argues that true human flourishing requires more than physical sustenance or technological advancement – it depends on purpose, autonomy, culture, and human connection. In order to advance this point, the text critiques the dominance of scientism and technocentrism, warning against neglecting the symbolic and humanistic dimensions essential to education and ethical development in an age shaped by AI and rapid technological change. To complement its critical approach, it examines contemporary cultural behaviours among the younger generation by presenting survey findings that highlight the evolving challenges in preparing them for a meaningful life beyond employment. Finally, it considers “the two cultures” and the possibility of a restored collaboration between science and the humanities in their strive for this goal and, eventually, for human self-understanding.

Keywords: science, humanities, culture, work, education, AI technology

A preamble

The selection of the article’s title was guided by its evocative power to suggest the complexity of this subject – one that, although not theological, resonates with profound philosophical undertones. The phrase “Man shall not live by bread alone”, which originates in the Old Testament of the Bible (*Deuteronomy* 8:3) and is quoted again in the New Testament (*Matthew’s Gospel*, 4:4), has evolved in modern parlance to signify that material comfort is insufficient for a meaningful life. Human flourishing – Aristotle’s *eudaimonia* – requires not just physical sustenance, but also deep connections, a sense of purpose, and intellectual engagement. Yet this perspective generates further questions, shaped by the epistemic paradigms of our era. In a world where terms such as “soul”, “spirit”, and “wisdom” are sometimes met with scepticism outside the context of theology, philosophy or poetry, we must scrutinize the “diet” of contemporary life – one increasingly composed of science, technology, and work – and consider what these

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elements mean for education and culture. At the same time, framing the initial hypotheses as questions, besides referencing the original idiom, is intended to encourage further consideration and a balanced examination of the topic, rather than pontificate or deliver peremptory guidelines.

By science alone?

One of the paradoxes of modernity lies in the tension between rapid scientific progress and the inherently human need for meaning. The limitations of science in providing moral and spiritual guidance were noted by the champion of empiricism himself. When Auguste Comte proposed a “religion of humanity” (Grayling, 2010: 384), he seemed to admit that, while scientific and technological advances have illuminated our world, perhaps we ought not to reduce all reasoning to what is empirically verifiable (Pope Benedict XVI, 2006). Science itself, originally rooted in scepticism, has assumed an almost dogmatic status today, at times overshadowing other forms of inquiry – historical, literary, philosophical (Haack, 2012: 2). This problematic stance, known as scientism, insists that scientific inquiry is the sole legitimate pathway to truth. Yet, as Professor Susan Haack argues, music, art, dance, and other human activities possess inherent value, independent of scientific analysis (Haack, 2012: 2, 4).

The rise of AI has further entrenched scientism, fostering a new “data religion” that challenges notions of selfhood and free will: “The sacred word ‘freedom’ turns out to be, just like ‘soul’, a hollow term empty of any discernible meaning. Free will exists only in the imaginary stories we humans have invented” (Harari, 2017: 329)¹. Algorithms are increasingly entrusted with authority once reserved for human judgement, threatening to supplant humanism in favour of a data-centric worldview where human health, happiness and freedom “may seem far less important” (Harari, 2017: 460) than the free flow of data, which becomes “the greatest good of all” (Harari, 2017: 445). However, envisioning technological advancement as the end of all other inquiry is itself a form of scientism, neglecting the symbolic and cultural dimensions that define our humanity (Haack, 2012: 21).

Moreover, the extension of scientific methodology from the study of the natural world to the realm of human nature and ethics² is fraught with risk (Thornton, 2016: 1). The perception of science as

¹ Alexandre (2018: 52) also touches on the problem of free will as inseparable from being human. However, in a biologist framework that favours nature over nurture, the odds are stacked against the notion of human freedom.

² It may also a form of scientism to apply the method and language of the natural sciences to all disciplines, focusing too much on tools and techniques (form) and too little on the specific substance of inquiry (Haack, 2012: 8, 9). In fact, “there is no ‘scientific method’ used by all and only scientists” (Haack, 2012: 17).

purely factual, “entirely ‘value-free’ and wholly irrelevant to normative questions, is far too crude” (Haack, 2012: 20) and can yield ethically ambiguous outcomes – particularly as we navigate issues such as genetic selection and AI. To ignore the “fallibility, and limitations and potential dangers” of science, whether willingly or not, is just as misguided as to reject its benefits entirely (Haack, 2012: 3). Both science and technology lack intrinsic self-restraint, necessitating external tempering by language and culture, the symbolic dimension typical to human beings (Alexandre, 2018: 21, 38, 40). There are already voices that warn against the exhilarating promises of a technological superintelligence by underlining the need to “hold on to our humanity: our groundedness, common sense, and good-humoured decency” to find a way to a “compassionate and jubilant use” of our most advanced technological achievement to date (Bostrom, 2017: 320).

The promises of transhumanism, the prevalent mindset in Silicon Valley (Alexandre, 2018: 8, 45), highlight the potential costs of technological enhancement and the drive to conquer death: diminished cognitive abilities (Hsu, 2025; Alexandre, 2018: 116; Spitzer, 2024: 17), and the loss of valuable cultural practices (Haack, 2012: 24) deriving their significance from our mortal condition. Without it, all the expressions of symbolic life that make our culture (art, music, literature) are valueless (Alexandre, 2018: 70-71). The assertion that science – particularly biology and physics – will eventually offer a comprehensive explanation of all aspects of existence, including the nuanced realities of human subjectivity, may foster unrealistic expectations for self-understanding and for achieving what Aristotle termed *eudaimonia*: “well-doing and well-being, flourishing, a sense of fittingness and achievement in the course of daily life” (Grayling, 2008: 25). While such an essentialist and mechanistic perspective risks overlooking the complex interplay between individuals and the cultures and societies they help shape, a more productive approach recognizes human subjectivity as a dynamic, *sui generis* phenomenon best explored through “humanistic” disciplines, with their own conceptual framework and vocabulary (Grayling, 2008: 143): “Subjectivity and culture are not explicable in biological terms alone. We need history, philosophy, literature and the arts too. Understanding this is a prerequisite for understanding human interests and entitlements” (Grayling, 2008: 144) and ultimately for the development of global ethics and the pursuit of a better world (Grayling, 2008: 146).

By work alone?

Work occupies a little more than a third of our adult lives (Baggini, 2021: 399), and is increasingly valorised as an end in itself. Yet defining life solely by work risks reducing existence to acquisition

and consumption. As it emerges from Max Weber's account, the highest good of a life lived according to a productivity culture is "completely devoid of any *eudaimonistic* admixture" (Weber, 1992: 18), so that any concept of happiness in this context becomes simply irrational. This is the opposite of Aristotle's conception of a life well-lived by embracing purposeful leisure and cultivating the mind, soul, and relationships, rather than fixating solely on productivity. Meant as a step in the right direction, the contemporary pursuit of a "work-life balance" reflects, instead, a separation between work and living (Baggini, 2021: 401), failing to capture the integration of instrumental activities with activities enjoyed for their own sake, as recommended by Hume in his philosophy of everyday life (Hume, 1777). For many people nowadays, the allure of AI is to render work more efficient, potentially expanding leisure. However, the character and quality of that leisure is crucial. If technology replaces fundamental skills like reading, writing or even thinking (Cunningham, 2025), we risk impoverishing both work and the choice of how we spend our leisure time.

As one journalist notes in the case of travelling, most people today prefer to travel faster than to improve their memory by paying attention to their surroundings, so "what is worth preserving, and what do we feel comfortable off-loading in the name of efficiency?" (Hsu, 2025) becomes a question worth pondering. There are people who still view the extensive use of gadgets as a negation of the wisdom one may acquire about oneself as a result of life experience and self-knowledge (Alexandre, 2018: 132). Educators also note that human autonomy in the digital age depends on maintaining knowledge and expertise within our own minds (Miclea, 2023; Spitzer, 2024: 15). The question of autonomy is all the more pressing as "academics notice with dismay that students with the vast resources of the internet available to them seem to have forgotten [...] how to read an actual book" (Haack, 2012: 23). It takes an effort of imagination to foresee what the labour market may look like even in the near future. The situation calls for educational systems to be reformed (Alexandre, 2018: 90) by identifying those domains where human intelligence and autonomous expertise will remain indispensable to collaboration with AI (Alexandre, 2018: 116). As we won't be able to compete with machines on technical matters, "the humanities and culture in general need to be rebooted" (Alexandre, 2018: 117) in order to "keep a lid on the deficit in the symbolic function [...] on which the preservation of what is human depends" (Alexandre, 2018: 116).

However, as mentioned before, contemporary education often privileges science and technical skills at the expense of literature and history, thus becoming "a rather partial matter" (Grayling, 2010: 153)

that only some great universities³ still strive to redress. The imbalance⁴ seems to echo, in reverse, the ancient Greek distinction between practical, technical or vocational training (banaustic education) for one's working life, and the study of liberal arts for "refinement of character and the development of moral virtues" (Grayling, 2010: 153), the equipment needed for the virtuous use of one's leisure time as well. The elitist implications of this educational approach has endured, which is why, while obviously both kinds are necessary and complementary, the emphasis in educational attitudes today may tend to favour the banaustic direction (Grayling, 2010: 153). While practical skills are indispensable, true education should cultivate the whole person, balancing vocational and humanistic subjects. Besides, education extends beyond institutional boundaries, encompassing the totality of lived experience found in literature⁵, films, theatre, museums. All these sources provide an "education of the emotions, sensibilities and attitudes" (Grayling, 2010: 154). It is a mark of the best schools and universities to use these broader cultural avenues for instruction today, addressing the needs of individuals both as citizens and as human beings.

One of the consequences of the increasingly diverse specialisations required by advanced economies is the overshadowing of those aspects pertaining to a liberal education that address the needs of the whole person rather than only those of the future employee (Grayling, 2010: 155; Grayling, 2008: 71, 135) by giving equal weight to humanistic subjects (literature, history, the arts) and scientific and practical subjects (Grayling, 2008: 138). Neither mathematics and science alone, nor literature and history alone can address the students' needs for a life well-lived (Grayling, 2010: 155; Haack, 2016: 191) or ensure an ethical societal environment. While the former may equip them for the world of work, the latter will equip them for the personal, social and political requirements of life. Since the humanities carry "the elements of civilised human existence" (Grayling, 2010: 155), it becomes a matter of concern when their importance is overlooked or diminished. Teachers usually understand that it is part of their mission to

³ Such as University of Oxford, which offers interdisciplinary undergraduate courses that may combine science subjects with humanistic subjects (e.g. "Physics and Philosophy", "Human Sciences").

⁴ "The humanities have become the weak sister of the sciences" [...] "classified as luxury items in national and state budgets" (Wilson, 2017: 61, 63); "Above them both [the arts and the humanities], casting a deep shadow like some alien mother ship parked above Manhattan, are the natural sciences" (Wilson, 2017: 63).

⁵ According to Grayling, literature (novels, drama, poetry) is one of the richest resources to explore the meanings, conflicts and dilemmas of life. By the situations it constructs, it tackles questions about choice and the proper course of action (Grayling, 2008: 30) in daily interactions.



prepare students to find meaningful employment after graduation, but few would describe this objective as their only objective, let alone as their highest moral purpose (Buller, 2014: 4).

A survey of student cultural habits

Culture, in its many forms, is rooted in humanistic values. The Latin origins of the word evoke cultivation – of soil, but also, metaphorically, of the mind and manners. Informed by Cicero’s concept of *humanitas*, Renaissance promoted humanism as a universally-shared virtue defined by compassion, benevolence and social responsibility. To this aim, the anthropocentric paradigm at the heart of the Renaissance encouraged the study of literature, rhetoric, philosophy and history, influential in shaping the modern notion of individuality. The idea emerged that it is not enough to be born human, you need to learn to become humane (Fideler, 2025).

With German Romanticism, the notion acquired the two main meanings we are familiar with today: on the one hand, Herder’s particularist concept of culture, emphasising the *Volksgeist* (the spirit of a people) distinctiveness of each culture, on the other, Humboldt’s universalist view regarding culture as the intellectual effort to preserve and transmit humanity’s heritage (Scruton, 2024: 14). In is in this latter sense that Matthew Arnold, the Victorian critic, defined culture as “the best that has been thought and known in the world” (Arnold, 1889, 31)⁶. While both of these philosophical approaches have shaped modern understandings of individuality and cultural diversity, this paper focuses primarily on the latter interpretation in examining some of the young generation’s cultural choices.

A small-scale quantitative survey of students’ cultural habits⁷ reveals a nuanced engagement with the arts and culture, shaped by both personal preferences and broader societal factors. A majority of respondents – over half – reported attending cultural events such as festivals, theatre performances, or art exhibitions only occasionally, typically a few times per semester, while more than a third participated just once a year or less. This pattern suggests that, for many students, cultural events are special occasions rather than regular fixtures in their lives.

When asked about more specific activities like visiting museums or attending theatre performances, most students admitted to doing so

⁶ The position, later continued in the writings of other British critics such as T.S. Eliot and Ezra Pound, upheld the idea that becoming cultured presupposed intelligence and a commitment to safeguarding these universal values (Scruton, 2024: 12).

⁷ Applied in May 2025, the survey consisted of twelve questions and had twenty-eight respondents, all first-year students in Management at the Faculty of Economics of Babeş-Bolyai University in Cluj-Napoca.

rarely, often only on special occasions or while traveling. Notably, while every student reported having visited a museum at least once, 61% do so infrequently. Half of them rarely attend live theatre, with 11% never going at all. Again, these results suggest that live performing arts and museum visits may not hold a central place in students' cultural routines, possibly due to competing interests, accessibility, or the growing influence of digital media.

Leisure time is typically spent socializing, attending events, or exploring new activities. However, while 57% enjoy travelling to a different city or country for new cultural experiences, only 11% attend a cultural or artistic event (a concert, a play, an exhibition). No student prefers to visit a museum or explore cultural sites, if given one of the other choices. This reflects the more general popularity of tourism nowadays, despite the fact that cultural experiences associated with tourism are limited, and mostly incidental to entertainment. Only a few dedicate their free time to reading or creative hobbies (18%), and there is a group (11%) who mostly use their free time on work and internship activities. While highlighting the balance students try to strike between social engagement and personal interests, the results show that career preparation and perhaps the need for self-support is a preoccupation that adds to their academic commitments.

Reading habits offer further insight into cultural engagement. Nearly half (46%) of the students read non-academic books only occasionally, with around a third reading regularly and a small minority (7%) never reading any kind of literature outside their coursework. Fiction is the most popular genre, followed by non-fiction, while poetry and plays appeal to very few. Library use is similarly limited (39%), reflecting the rise of digital resources and changing habits around reading and research.

Classical music, often considered a marker of "high culture", plays a minor role in students' lives. Only a small percentage (7%) regularly listen to symphonies, concertos, or operas, while most do so rarely or not at all. This underlines a broader trend: traditional forms of cultural participation are being supplanted, for many, by more accessible or contemporary alternatives.

When it comes to cultural influences, family members and close friends exert the strongest impact, shaping students' tastes and habits. However, a quarter of students cite well-known cultural personalities as role models, but none identify with social or political activists in this regard. This suggests that intimate and familiar influences remain paramount even in an age of celebrity and digital media, but it also reflects the fact that public leadership figures are viewed with mistrust.

The influence of social media is pervasive but nuanced. Over half of the respondents (54%) acknowledge that their cultural interests

are shaped by content they encounter online, while a significant minority (21%) engage actively with cultural material on these platforms. However, a quarter of the students see only limited effects, suggesting that while digital media is ubiquitous, its influence varies widely among individuals.

Finally, students' views on the impact of artificial intelligence on culture are cautiously optimistic. The majority (57%) believe that, despite the rise of AI, traditional cultural practices and human creativity will remain central. A quarter anticipate that AI will play a significant role in shaping new forms of art and cultural experience, while a smaller group (18%) expresses concern that AI could standardize or homogenize cultural production. Yet, all agree that AI will inevitably influence the future of culture to some extent.

Overall, these findings highlight a complex balance between personal choice and external influence, and faith in the value of human creativity within an evolving cultural landscape. Grouping related survey results and clarifying their implications allow us to see more clearly the challenges facing students as they navigate today's fluid cultural setting, especially since the data also indicates students' view that technologies like generative art and AI could have a significant impact on cultural production, similar to the influence on it of social media algorithms (Rothman 2025).

Conclusion

The importance of providing young people with education in both science and the humanities is reflected in C.P. Snow's observations from his Rede lecture on "the two cultures". Delivered at the University of Cambridge in 1959, it highlighted a growing divide between the sciences and the humanities, discussing its impact on society and education: "Literary intellectuals at one pole – at the other Scientists [...]. Between the two a gulf of mutual incomprehension" (Snow, 1998: 4) borne out of "a lack of respect" (Wilson, 2017: 62). Despite some optimism expressed by scientists,⁸ this separation continues to influence educational policy and student experiences, in a system that is rendered far less ambitious by its too exclusive aim of training students to gain employment (Grayling, 2008: 139)⁹. Consequently, this polarisation

⁸ Although there is still no bridge between the two cultures, emerging new disciplines may create a "broad borderland" connecting them, so that, one day, the gap might close (Wilson, 2017: 144).

⁹ The humanities are apparently acknowledged as extremely significant and held in high esteem, not least by business leaders, fifty-one percent of whom rank a liberal education as very important, according to a 2013 American survey. However, this value is not reflected in the financial support the institutions providing it receive, or in the admissions policies of the major universities. For instance, an applicant's background in the sciences is now the determining factor in the process of admission at the University of Yale (Wilson, 2017: 62).

(Snow, 1998: 3) remains relevant, with contemporary academics in both humanities (Haack, 2012: 93; Scruton, 2024: 31; Buller, 2014: 1, 2) and the sciences (Wilson, 2017: 145) still referencing it when considering the effects of a focus on scientific disciplines over a broader educational background, which may translate into an emphasis on preparing students for professional, high-productivity careers, rather than fostering wider, life-enhancing cultural interests and habits of an unmarketable kind as well.

Culture is a realm of intrinsic value (Scruton, 2007: 109), intimately tied to the moral values and ideals that a democratic society relies on: “It contains the knowledge of what to feel, in a world where feeling is in constant danger of losing its way” (Scruton, 2007: 89)¹⁰. Citing Oswald Spengler’s remark in *The Decline of the West* (1918), philosopher and academic Roger Scruton points out that the survival of culture depends on each of us (Scruton, 2007: 86). When we stop contemplating paintings by the old masters or listen to classical music, these cultural values and their message will disappear. As seen from the survey, the archives we store our culture in (libraries, universities, museums) do not guarantee its survival. We seem to be living in the aftermath of high culture, a culture in which we have lost faith. Even more worryingly, the signs of its revival through engaged critical thinking have mostly taken place outside the university, in private research institutions, small independent publications and literary circles (Scruton, 2007: 88).

It is hard to predict what AI’s effect will be on humanistic culture – whether, for example, it might be replaced by a form of “neuroculture” as some speculate (Alexandre, 2018: 117). In any case, what is increasingly clear is that, as one journalist put it rather ominously, “AI is coming for culture” (Rothman, 2025). It remains to be seen whether the suppression of the classical humanistic culture may give rise to a movement of resistance born out of “revulsion” against the prevailing nihilism of the university and the marketplace (Scruton, 2007: 109). Even though the chances are small that high culture may reclaim the central place it once occupied in university education and in the priorities of politicians,¹¹ such a movement may succeed in proving that culture matters and that it is worth defending (Scruton, 2007: 109).

At the same time, in a context in which we are “drowning in information and starved for wisdom” (Wilson, 2017: 148), it is necessary to reevaluate the isolated perspectives associated with “the two cultures.”

¹⁰ The same idea can be found in Scruton, 2024: 30-31.

¹¹ Journalist David Remnick notes the ongoing turmoil in American cultural institutions, warning about the dangerous direction democracy takes “when the political boss takes over [...], and dictates who’s acceptable and who is not” (Remnick, 2025).

As Snow noted, exclusivity within each field can limit broader approaches to knowledge and its applications. Despite ongoing disagreements, misinterpretations, and mutual calls for self-reflection, the relationship between science and the humanities is fundamentally reciprocal, with each discipline informing and influencing the other (Wilson, 2017: 142). That is why a third – and lasting – Enlightenment age (Wilson, 2017: 150) may emerge only if these two branches of inquiry start collaborating to establish the deep connections between biological and cultural evolution, the ultimate “philosopher’s stone” of understanding humanity (Wilson, 2017: 147) in all its mutable complexity.

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ISSI

Zur beruflichen Entwicklung ungarischer und deutscher Volksschullehrpersonen (1867-1914)

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On the Professional Development of Hungarian and German Elementary School Teachers (1867-1914)

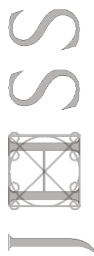
Abstract:

In order to understand the role of teachers today, which requires new tasks, we need to see the professional development of primary school teachers in a historical context. This study deals with elementary school teachers and the teaching profession during the period of dualism. Focusing on the period between 1867 and 1914, it takes the reader into the world of Hungarian and German elementary school teachers. The emergence of the profession of elementary school teachers can be seen as part of the professionalization processes in modern societies, which justifies a brief overview of the theoretical framework of professionalization and, in this context, an interpretation of the basic concepts. We turn to some research on the history of professionalization, the results of which can be used to describe the theoretical framework of the professional development of elementary school teachers. The analysis of German school reforms in this article focuses on Prussia as the social and educational system that has the most in common with Hungary among Western European countries.

Keywords: professionalization, elementary school teacher profession, elementary school, elementary teacher, modernization

1. Theoretische Ansätze zur Professionalisierung von Lehrpersonen

In der Forschung, die die Sozialgeschichte verschiedener Gruppen von Intellektuellen analysiert, werden häufig die Begriffe Profession, Professionalisierung oder sogar Professionalität verwendet (Nóbik, 2019). Im engeren Sinne bezieht sich der Begriff Profession auf eine institutionalisierte Form eines intellektuellen Berufs, eine schwer zu erwerbende Expertise, die als hoher sozialer Status anerkannt ist (G. Havril, 2009; Nagy, 2009). Profession im allgemeinen, weiten und engen Sinne bezieht sich auf eine Tätigkeit (z. B. Ärztin und Arzt, Rechtsanwältin und Rechtsanwalt), die mit erlerntem Fachwissen ausgeübt wird und einem sozialen Bedürfnis entspricht. Er bezieht sich im Allgemeinen auf ein Fachgebiet, das sich von anderen unterscheidet,



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mit einer eigenen Theorie und Praxis und spezifischem Wissen; bedeutet einen Beruf, eine Beschäftigung, eine Tätigkeit für das öffentliche Wohl, mit einer sozialen Funktion (Vámos, Kálmán, Bajzáth et al., 2020). Der Begriff Professionalisierung hingegen bezieht sich auf den Prozess, durch den dies geschieht.

Der Begriff der Professionalisierung wurde in der englischen Literatur eingeführt, der „zur Beschreibung der Professionalisierung von verschiedenen intellektuellen Expertengruppen mit unterschiedlichen theoretischen und praktischen Aufgaben (in diesem Fall des Lehrerberufs), des Tätigkeitsfeldes zu einem Beruf verwendet wird“ (Németh, 2005: 161). Der theoretische Hintergrund der Interpretation und des konzeptionellen Rahmens professioneller Wissenskonstruktionsprozesse basiert auf der Wissenssoziologie und der historischen Anthropologie, „wonach die Realität, unabhängig von einem individuellen Subjekt oder Objekt, die gedankliche Konstruktion einer bestimmten Gruppe ist“ (Berger und Luckmann, 1998 zitiert in Németh, 2008: 87). Diese Konstruktionsprozesse und damit die Herausbildung der Berufe, die die moderne Gesellschaft kennzeichnen, können aus verschiedenen Blickwinkeln untersucht werden. Eine Richtung ist die funktionalistische, strukturorientierte Analyse, nach der die einzelnen Professionen die Wertorientierungen der Gesellschaft und ihre funktionalen Voraussetzungen für ihre Institutionalisierung nutzen (Németh, 2008). Der machttheoretische Ansatz (Heidenreich, 1999: 40-44) interpretiert die Herausbildung von Berufen im Hinblick auf die mit ihnen verbundenen Vorteile und Privilegien. Dieser Ansatz lässt jedoch die kognitiven Komponenten der Mikroprozesse der Berufsbildung unberücksichtigt. Nach dem Ansatz, der sich auf die kognitiven und symbolischen Dimensionen konzentriert (Heidenreich, 1999: 46.; Foucault, 2000: 91-102), ist eine erfolgreiche Professionalisierung ein Konstruktionsprozess, der einen wissenschaftlich systematisierten und auf einer neuen konzeptionellen Ebene formalisierten Wissensbestand hervorbringt. Er trägt zur Lösung praktischer Probleme und zur Bildung in systematischer Form bei und kann durch systematische Forschung erweitert werden. Die Wissensbasis spielt auch eine wichtige Rolle bei der Entwicklung der Identität des Berufes. Dieser Ansatz zielt darauf ab, neue kognitive Strukturen des Wissens zu erforschen, und begnügt sich nicht damit, die strukturellen institutionellen Elemente der Berufsbildung sowie die durch Machtverhältnisse beeinflussten Elemente zu untersuchen (Németh, 2008).

Die ersten Arbeiten über Berufe und Professionalisierung in der westlichen Soziologie und Geschichte wurden von Talcott Parsons (1939) verfasst und veröffentlicht. Die meisten Wissenschaftlerinnen und Wissenschaftler sind der Ansicht, dass seine Studie *The professions and social structure* aus dem Jahr 1939 den Beginn der Untersuchung der

Entstehung moderner Berufe markiert, die durch die Unzufriedenheit mit den zeitgenössischen soziologischen Studien ausgelöst wurde. Parsons war der Ansicht, dass sich die Forschung über die Berufe auf das Individuum, das Selbstverständnis, die Produktivität und den Utilitarismus konzentriert hatte. Um das wahre Wesen der Berufe zu verstehen, müssen wir sie seiner Meinung nach (auch) als soziale Strukturen betrachten. Das Wesen der Berufe besteht für ihn darin, dass viele der wichtigsten sozialen Funktionen in einem professionellen Rahmen ausgeübt werden (Nóbik, 2019). Der amerikanische Soziologe ist der Ansicht, dass Berufe den Rahmen für die Ausübung bestimmter sozialer Funktionen wie wissenschaftliche Forschung, freie Bildung, Erziehung, Gesundheitswesen oder Recht bilden. Dieser Ansatz wurde später als Strukturfunktionalismus bezeichnet, der zwei Hauptmerkmale von Berufen unterscheidet: systematisches Wissen und soziale Orientierung (Parsons, 1966 zitiert in Keller, 2010: 18). Nach Parsons hat Professionalisierung als Merkmal von Modernisierungsprozessen zwei miteinander verbundene, aber unterschiedliche Bedeutungen. In einem allgemeineren Sinne bedeutet er Professionalisierung; er wird verwendet, um effizientere, präzisere Tätigkeiten und soziale Prozesse zu bezeichnen. Im engeren Sinne bedeutet Professionalisierung das Entstehen von spezialisierten Berufen, was den Besitz einer bestimmten Art von Wissen, die Bereitstellung formaler Qualifikationen, um dies zu gewährleisten, und die Festlegung von Zugangskriterien voraussetzt. Professionalisierung im letztgenannten Sinne bedeutet, dass diese Arten von Tätigkeiten zu lebenslangen Berufen werden, die durch Gewohnheit oder Gesetz geschützt sind und auf einen institutionalisierten Schutz ihrer Interessen in Berufsverbänden zählen können. Der Schwerpunkt liegt auf der institutionellen Kontrolle der sozial verantwortlichen Nutzung des durch die formale Ausbildung erworbenen Wissens. Dazu gehören die Festlegung von Aufstiegswegen sowie die Einhaltung bestimmter Verhaltensmuster und Interaktionsregeln (Parsons, 1968).

Die berufsgeschichtliche Forschung hat auch im deutschsprachigen Raum an Bedeutung gewonnen (z. B. Apel, Horn, Lundgreen und Sandfuchs, 1999; Ferchhoff, 2009), wobei vor allem nach spezifischen kontinentalen Professionalisierungsmodellen gesucht wird. Für Forscherinnen und Forscher im Bereich der (kontinentalen) Professionalisierungsmodelle und insbesondere für die deutschen Berufe waren die staatlichen Eingriffe und die Hochschulbildung die wichtigsten Untersuchungsbereiche. Wir wollen hier einige Interpretationen herausgreifen. Hermann (1999) betrachtet Professionalität als ein Merkmal der beruflichen Tätigkeit. Er sieht sie als einen qualitativen Anspruch, der verschiedenste Dimensionen der Selbst- und Fremdbeschreibung umfasst, und als einen historisch begrenzten und historisch sich entwickelnden Sachbericht über die

verschiedenen Berufe unserer Zeit. Nach Lundgreen (1999) ist der Prozess der Professionalisierung gekennzeichnet durch: a) professionelles Wissen, das durch Studium, Prüfungen und Titel gesellschaftlich anerkannt wird; b) Qualifikation, die für die Berufsausübung notwendig ist und an die in Prüfungen anerkannten Qualifikationen anknüpfen; und c) eine Orientierung am "Gemeinwohl" als Berufsideologie. Dementsprechend bezeichnet der Begriff der Professionalisierung einen historischen Wandel, der mit der Entstehung "neuer" Merkmale, ihrer Verstärkung und manchmal auch mit dem Ende der Entwicklung verbunden ist. Professionalisierung bezieht sich somit auf den historischen Prozess, durch den die genannten Merkmale eines Berufs entwickelt werden.

Der Prozess der Professionalisierung in Europa ist gekennzeichnet durch eine wissenschaftlich fundierte berufliche Vorbereitung während des Hochschulstudiums, das Bestehen von Prüfungen, einen Titel und eine berufliche Qualifikation, die mit einem Abschluss verbunden sind, einen berufsspezifischen Verhaltenskodex, eine berufliche Laufbahn, hohe soziale Anerkennung, verschiedene Vergünstigungen und finanzielle Wertschätzung (Németh, 2005). Parsons zufolge steht dies im Gegensatz zum angelsächsischen Typ der Professionalisierung, „bei dem sich die Berufe außerhalb der Universitäten im Rahmen traditioneller Zunftinstitutionen entwickelten“ (Magos, 2017: 153-154). In der internationalen Forschung zur Geschichte der europäischen Berufe besteht ein relativer Konsens darüber, dass die Rolle des Staates im Prozess der Professionalisierung in Europa viel entscheidender war als in der angelsächsischen Welt.

Um das Thema näher zu beleuchten, lohnt es sich, eine weitere begriffliche Unterscheidung auf der Grundlage der internationalen Literatur vorzunehmen. Hargreaves (2010) unterscheidet zwischen den Konzepten der Professionalität und der Professionalisierung. Nach seiner Interpretation bezieht sich Professionalität auf die Qualität und die Anhebung der Standards bei der Ausübung eines Berufs, während sich Professionalisierung auf die Steigerung des Prestiges und des sozialen Ansehens bezieht. Er betont, dass die beiden Prozesse zwar in der Regel als komplementär angesehen werden, da eine Steigerung der Qualität einen Prestigegegewinn impliziert, dies aber nicht unbedingt der Fall sein muss. Wenn beispielsweise bei Lehrpersonen die Standards auf wissenschaftlich-technische Weise festgelegt werden und die mindestens ebenso wichtige emotionale Seite des Berufs (Sinn für Berufung, Leidenschaft, Fürsorge) unberücksichtigt bleibt, kann dies den Beruf selbst entwerten (vgl. Hargreaves, 2010; Nóbik, 2019).

Es ist wichtig darauf hinzuweisen, dass, wenn der Beruf als Berufung bezeichnet wird, eine engagierte Identität hervorgehoben wird. In diesem Sinne ist eine Berufung mehr als ein Beruf, sie bezieht sich auf

die Identität der Einzelperson. Professionell zu sein bedeutet, sich für das Wohlergehen anderer zu engagieren, und zwar in der Regel ein Leben lang (Derosa et al., 1996). Die Beziehung zum Professionalismus, die sich in der Mentalität, dem Wissen und den Einstellungen eines Menschen manifestiert und seine Berufsausübung beeinflusst, wird in der internationalen Literatur als Professionalität bezeichnet (Evans, 2008; Horn, 2016).

Der Begriff “professionell” wird verwendet, um das Niveau der Professionalität in einer bestimmten Tätigkeit und indirekt die Zugehörigkeit zu einem Beruf zu bezeichnen (Németh, 2009; Carr, 2014). Letzteres wird im Allgemeinen so verstanden, dass jeder Beruf auf professionellem Niveau ausgeübt werden kann. Die Forschung hat jedoch festgestellt, dass es keine direkte Verbindung zwischen der Professionalität einer Einzelperson und der Professionalität einer Gruppe gibt, d. h. jeder Beruf und jede Beschäftigung hat Vertreterinnen und Vertreter, die auf eine Art und Weise denken und sich verhalten, die nicht berufsspezifisch ist (Nóvik, 2019). Und der Begriff “Experte” und “Fachwissen” bezieht sich auf einen Lernprozess und sein Produkt, d. h. das Wissen, das den Profi/Experten vom Laien unterscheidet (Vámos, Kálmán, Bajzáth, 2020).

Die obige kurze Zusammenfassung zeigt, dass es in der internationalen Forschung eine lange Debatte über das Wesen von Berufen gibt. In der ungarischen Fachliteratur wurden auch mehrere ausführliche Zusammenfassungen von Theorien über Berufe veröffentlicht (z. B. Kleisz, 2002; Nagy, 2009; Halmos und Szívós, 2010; Vári, 2010; Németh, 2013; Vámos, Kálmán, Bajzáth et al., 2020). Seit den 2000er Jahren haben sich die multidisziplinären Ansätze kontinuierlich erweitert und neue Aspekte wurden vorgestellt. Die Forschung hat die Entstehung einer Reihe von Berufen und Professionen untersucht, beispielsweise die Entstehung medizinischer (z. B. Simon, 2010), pharmazeutischer (z. B. Magos, 2017), juristischer (z. B. Sebők, 2016), historischer (z. B. Gyáni, 2016), architektonischer (z. B. Keller, 2009) oder auch helfender Berufe (z. B. Nagy, 2019). Die Forschungen mit einem im Wesentlichen soziologischen Ansatz, der die Entstehung, die Entwicklung und den Wandel von Berufen hauptsächlich aus einer historischen Perspektive analysiert, haben für alle Berufe wichtige Ergebnisse hervorgebracht. Aus der Perspektive unseres Themas ist die Untersuchung des Lehrberufs herausragend (z. B. Kálmán, 2019).

Keller (2010) stellt in seinem Buch *Die Situation der Lehrpersonen (A tanárok helye)* einen soziologischen Ansatz für Professionalisierungstheorien vor, der hilft, das Konzept der Professionalisierung zu verstehen. Als Ausgangspunkt beschreibt er drei konzeptionelle Eckpfeiler von Professionalisierungstheorien, die immer die gleiche Grundbedeutung haben, aber manchmal unterschiedlich

definiert werden und unterschiedliche Schwerpunkte haben können. *Arbeit* ist eine Tätigkeit, die nicht regelmäßig, aber strukturiert ausgeübt wird, *Beruf* ist eine Tätigkeit, die strukturiert und geordnet ausgeübt wird, und *Profession* ist eine Tätigkeit, die nur von Expertinnen und Experten ausgeübt werden kann. Allerdings gehen die Meinungen darüber auseinander, was eine Berufung genau ausmacht, wie die Professionalisierung abläuft und wer an diesem Prozess beteiligt ist.

In Bezug auf die Theorien der Professionalisierung gibt es in der ungarischen Literatur auch Beispiele für die Trennung der Konzepte der Professionalisierung und der beruflichen Entwicklung von Lehrpersonen. Németh (2013) unterscheidet die beiden Konzepte wie folgt. „... der Begriff der Professionalisierung wird im Zusammenhang mit der Konstruktion oder Institutionalisierung des Wissens der Experten oder Wissenselite (...) verwendet, das an der Universität erworben werden kann. Unter der beruflichen Entwicklung verstehen wir die Institutionalisierungsprozesse von praktischen Berufen (z. B. Facharbeiter, Produktionsleiter, Volksschullehrer) mit geringerem Sozialprestige, die in berufsbildenden Sekundarschulen erworben werden können. Ihre Ausbildung erfolgt ebenfalls in einem separaten, dualen System (Berufsschule/Universität)” (Németh, 2013: 101).

Der Begriff der Professionalisierung wird in der ungarischen Literatur also nicht nur als das Entstehen von Berufsgruppen verstanden. György Lengyel unterscheidet in seiner Studie über die Ausbildung und Rekrutierung der Wirtschaftselite den Begriff der Professionalisierung wie folgt. „Professionalisierung kann laut Literatur auf zwei verschiedene Arten verstanden sein. Einerseits bezeichnet er die Professionalisierung im Prozess der Modernisierung, andererseits aber auch die Entstehung von Berufen der Professionalität, die berufliche Entwicklung” (Lengyel, 2007: 40). Um den Begriff der Professionalisierung differenzierter zu interpretieren, unterscheidet Lengyel zwischen zwei möglichen Auslegungen des Begriffs, nämlich der Professionalisierung und der Entstehung von Berufen (Lengyel, 2007).

Die Untersuchung der Professionalisierung hat sich in der ungarischen Bildungsgeschichte vor allem durch die Forschungen von András Németh verbreitet, obwohl es bereits frühere Studien zu den mit dem Professionalisierungsprozess verbundenen Phänomenen gab. Die bildungsgeschichtliche Forschung unterscheidet zwischen der Professionalisierung von Lehrpersonen der Volksschule und der höheren Schulen, was unter anderem damit begründet wird, dass sich die beiden Berufsgruppen in ihrer Ausbildung und ihren pädagogischen Fachzeitschriften unterscheiden. Vielleicht ist eines der wichtigsten Argumente die Entwicklung einer unterschiedlichen methodischen Kultur und einer eng verwandten Fachsprache (Frank, 2020). Die

Forschungen von Németh (2005, 2007) haben sich sowohl mit der Professionalisierung des Sekundarschulunterrichts als auch mit der Konstruktion der Wissensinhalte im Volksschulbereich befasst (Németh, 2008, 2013). Der Ausgangspunkt für unsere Forschungen basierte auf den Schriften über die berufliche Entwicklung der Volksschullehrpersonen.

In jüngster Zeit hat sich in der internationalen Forschung eine vergleichende historische Analyse des Professionalisierungsprozesses durchgesetzt, die die Unterschiede zwischen der angelsächsischen und der kontinentaleuropäischen Entwicklung deutlich macht. Das angelsächsische Modell basiert auf einem System autonomer angelsächsischer Bildungsformen, die von staatlicher Kontrolle unabhängig sind, während das kontinentaleuropäische Modell auf einem staatszentrierten Bildungssystem beruht (Lundgreen, 1999). Die beiden ausgeprägten spezifischen Trends des kontinentaleuropäischen Modells sind die Professionalität der deutschen und französischen Lehrpersonen, die die Entwicklung der Lehrberufe grundlegend geprägt haben. In Mitteleuropa folgt die Institutionalisierung der Lehrberufe dem deutschen Muster (Tenorth, 1999). Die Untersuchungen von Kovács M. (2001) bestätigen die internationalen Forschungsergebnisse. Sie analysiert die Entstehung und Entwicklung der ungarischen Berufsgruppe und kommt zu dem Schluss, dass diese den deutschen und österreichischen Mustern folgt. Dies bildet die Grundlage für die deutsch-ungarische vergleichende Ausrichtung unserer Untersuchung.

Die Entwicklung der ungarischen und deutschen Volksschullehrerschaft zwischen 1867 und 1914

Die räumliche und zeitliche Ausdehnung des Schulwesens sowie die Entstehung und Abgrenzung von Berufsgruppen, die sich professionell mit Bildung beschäftigen, ein wesentliches Merkmal der Entwicklung moderner Bildungssysteme ist. Dieser Prozess ging Hand in Hand mit der Professionalisierung des unteren und höheren Lehrberufs und der Organisation der Lehrergesellschaft (vgl. Halász, 2001). Der Prozess der beruflichen Entwicklung der Volksschullehrpersonen ist ein grundlegendes Merkmal der Bildungsmodernisierung. In beiden Ländern gibt es zahlreiche Beispiele für die berufliche Entwicklung von Volksschullehrpersonen. Im Folgenden werden einige der charakteristischen Elemente des beruflichen Entwicklungsprozesses hervorgehoben, die veranschaulichen, wie sich die Volksschullehrpersonen in den beiden Ländern in Berufsgruppen und –organisationen organisierten und wie sie Institutionen und Foren für eine unabhängige berufliche Interessenvertretung schufen. Aus einer vergleichenden Perspektive werden die folgenden Merkmale dargestellt: (1) die Entstehung einer Berufsgruppe von Lehrpersonen in den

Volksschulen, die sich professionell für die Bildung engagierten; (2) die Regelung der Finanzierung der Volksschullehrpersonen; (3) die Schaffung von Organisationen, die berufliche und existenzielle Interessen vertreten; (4) die Entstehung von Presseorganen (Zeitschriften, Bücher), die für den Lehrerberuf geschrieben wurden (Tabelle 1).

Tab. 1 Einflussfaktoren auf die Entwicklung des Volksschullehrerberufs in Ungarn und Deutschland (Quelle: eigene Darstellung)

Elemente, die die Entwicklung des ungarischen und deutschen Volksschullehrerberufs beeinflussen
1. Das Entstehen einer Berufsgruppe von Lehrpersonen der Volksbildung
2. Regelung der Finanzierung der Lehrkräfte
3. Die Schaffung von Organisationen, die berufliche und existenzielle Interessen vertreten
4. Veröffentlichung von Fachzeitschriften
5. Veröffentlichung von Büchern für den Lehrerberuf

1. Die qualitative Veränderung in der Entwicklung des ungarischen und deutschen Volksschullehrerberufs in der zweiten Hälfte des 19. Jahrhunderts zeigt sich in der Zunahme der Zahl der Lehrpersonen. In der Zeit von der Gründung des Deutschen Reiches bis zum Ersten Weltkrieg hat sich die Zahl der Lehrpersonen an den Volksschulen mehr als verdoppelt. In Preußen spielte dabei die Verdoppelung der Zahl der Lehrerseminare zwischen 1872 und 1914 eine wichtige Rolle. Die Zunahme der Seminarkapazitäten war auch in anderen deutschen Gebieten zu spüren. Nach einer Statistik von 1911 gab es im Deutschen Reich 185 485 Volksschullehrpersonen an den öffentlichen Volksschulen. Trotz des Anstiegs der Lehrerschaft war der Volksschullehrerberuf jedoch auch in der Kaiserzeit im 19. Jahrhundert ein ausgesprochener Mangelberuf. Die Zahl der Kinder pro Klasse ging zwar zurück, war aber immer noch dreimal so hoch wie im höheren Schulwesen. Laut Statistik kamen im Jahr 1886 75 Schülerinnen und Schüler auf eine Volksschullehrperson, 1911 waren es durchschnittlich 55 (Kuhlemann, 1991; Titze, 1991).

In Ungarn bildete das Gesetz über das öffentliche Schulwesen von 1868 den Ausgangspunkt für die Entwicklung des modernen ungarischen Volksschullehrberufs, dessen Zahl sich bis zum Ende der dualistischen Ära fast verdoppelte. Während 1869 die Zahl der Lehrer 17 792 betrug, lag sie 1910 bei 32 402, was einem Anstieg von 80 % entspricht (Kelemen, 2007). Im Schuljahr 1881-1882 waren 20 207

Volksschullehrer und 2 189 Lehrerinnen im Bildungswesen tätig. Im Studienjahr 1913–1914 stieg der Anteil der Lehrerinnen auf 32,4 % und im Schuljahr 1917–1918 arbeiteten neben 13 956 Volksschullehrern 13 016 Volksschullehrerinnen in den Volksschulen, was einer Quote von 48,28 % entsprach (Kiss, 1929: 45-47).

Trotz des raschen Anstiegs der Zahl der Lehrpersonen war der relative Volksschullehrermangel, ähnlich wie in Deutschland, stark ausgeprägt. Die allmähliche Zunahme der Schülerzahlen und insbesondere die Erhöhung des Anteils der Schülerinnen und Schüler, die die Schule besuchen, begünstigt durch immer strengere Maßnahmen der Behörden, führte zu einem starken Anstieg der durchschnittlichen Schülerzahl pro Lehrpersonen. Das Gesetz über das öffentliche Schulwesen von 1868 erlaubte eine Höchstzahl von 80 Schülerinnen und Schülern¹ pro Lehrperson. Statistiken aus dem Jahr 1869 zeigen jedoch, dass in kleinen Dörfern ein Volksschullehrer für 25–30 Kinder zuständig war, während diese Zahl in den Städten auf 200 ansteigen konnte (Pukánszky und Németh, 1997).

2. Ein wichtiger Punkt in der Entwicklung des modernen Volksschullehramts in Mitteleuropa war die Regelung der Lehrergehälter. Die Wahrnehmung der Volksschule als Bildungseinrichtung hatte in Preußen lange Zeit die Züge einer „zweitklassigen Ausbildungsstätte“, was sich auf die Einschätzung der Stellung der Volksschullehrpersonen auswirkte. Es herrschte die Auffassung, dass die Lehrpersonen, da sie nur „zweitklassige Arbeit“ leisteten und der Volksschullehrberuf keine nennenswerten intellektuellen Anforderungen an sie stelle, keine akademische Ausbildung in Pädagogik benötigten. Diese Auffassung stand im Zusammenhang mit der Bezahlung der Volksschullehrpersonen. Es gab einen großen Einkommensunterschied zwischen Lehrpersonen an Volksschulen und anderen Lehrerkategorien. Die Volksschullehrerinnen und Volksschullehrer wurden schlechter bezahlt als ihre Kollegen, die auf höheren Ebenen unterrichteten (Titze, 1991).

Im Jahr 1872 hatten mehr als 50 % der Volksschullehrpersonen an einer Volksschule ein Einkommen von weniger als 1/3 des Anfangsgehalts einer Lehrperson an einer höheren Schule. Außerdem gab es regionale Unterschiede bei den Lehrergehältern zwischen städtischen und ländlichen Schulen. Bis zum Aufschwung von 1873 wurde der Unterschied in den Gehältern bei einer Erhöhung nicht berücksichtigt. Während der Amtszeit von Falk (1872–79) verbesserten sich jedoch allmählich die Lebensbedingungen der

¹ Wenn es möglich war, sollten die Schülerinnen und Schüler laut des Gesetzes über den Volksschulunterricht (29. § 1868) voneinander getrennt in verschiedenen Klassen unterrichtet werden.

Volksschullehrpersonen. Die Volksschullehrergehälter stiegen bis 1878 um 35–40 %, doch die Kluft zwischen den höchsten und niedrigsten Gehältern war immer noch enorm. Die regionalen Unterschiede zwischen städtischen und ländlichen Schulen blieben bestehen. Volksschullehrpersonen, die den Mangel ausnutzten, suchten nach besser bezahlten Schulen, um ihre eigene soziale Situation durch häufige Schulwechsel zu verbessern. Ein einheitliches Mindesteinkommen wurde erstmals durch das preußische Dienstbezügegesetz von 1897 normiert (Titze, 1991; Arnhardt, Hofmann und Reinert, 2000). Es legte das monatliche Einkommen auf mindestens 50 und höchstens 400 Taler fest². Das Gesetz unterschied zwischen Schulen auf dem Lande, kleinen und mittleren städtischen Schulen sowie Schulen in Großstädten. Höhere Gehälter konnten die Schulleiter nur in Schulen in Großstädten anbieten, wo das Einkommen 400 Talente erreichen konnte. Bargeld war nicht die einzige Form der Entlohnung. Das Gesetz sah auch die Bereitstellung von Brennstoffen und Lehrerwohnungen als Zahlungsmittel vor. Bei der Besoldung von Lehrpersonen ist zu beachten, dass die damalige Gesetzgebung zwischen den Gehältern von Lehrern und Lehrerinnen unterschied, wobei das Gehalt der Frauen durch die Erstattung der Miete oder des Mietzinses für eine Wohnung, die Bereitstellung von Brennholz und eine Barvergütung zwischen 120 und 200 Talern definiert wurde (Das preußische Lehrerbesoldungsgesetz vom 3. März, 1897).

In Ungarn wurden in der zweiten Hälfte des 19. Jahrhunderts die Vorschriften für ein einheitliches System der Volksschullehrergehälter erlassen. Das Volksbildungsgesetz von 1868 regelte die Höhe und die Art und Weise der Volksschullehrergehälter für kommunale und staatliche Lehrpersonen sowie die Zulagen für Lehrpersonen, die durch Krankheit oder Alter arbeitsunfähig wurden. Ebenso wurden die Zuwendungen für die Hinterbliebenen von verstorbenen Lehrpersonen geregelt. Das Gesetz legte fest, dass das Gehalt einer Volksschullehrperson vom Schulrat nach den örtlichen Verhältnissen mit Zustimmung des Schulbezirksschulrats festgesetzt werden sollte. Es legte ein Mindesteinkommen fest: „Abgesehen von einer angemessenen Wohnung und mindestens einem Viertel Hektar Garten darf das Gehalt jedoch nicht weniger betragen als: a) 300 frt. pro Jahr für einen regulären Lehrer an einer Volksschule“ (§ 142 des Gesetzes XXXVIII von 1868). Die kirchlichen Schulerhalter durften die Gehälter der Lehrpersonen selbst festlegen (§ 11 des Gesetzes XXXVIII von 1868).

Die finanzielle Situation der Lehrpersonen hat sich jedoch nach der Einführung des Gesetzes über das öffentliche Bildungswesen nicht wie erwartet verbessert. Auch das Einkommen der Lehrpersonen in

² Im Jahr 1871 wurde der Wechselkurs von 1 *Vereinstaler* = 3 Mark eingeführt (Pick, 1994).

Ungarn war durch Vielfalt gekennzeichnet. Die Gehälter der Lehrpersonen stammten aus mehreren Quellen. Das Einkommen in Form eines Betrags ergab sich durch die Vergütung von Zahlungen in Form von Produkten und Dienstleistungen. Die Zulagen umfassten neben dem Jahresgehalt auch Zahlungen in Form von Wohnraum, Brennholz, Land, Erzeugnissen und anderen Sachleistungen. Mit dem Gesetz XXVI von 1893 „über die Regelung der Gehälter der Volksschullehrer und Lehrerinnen an den städtischen und konfessionellen Volksschulen“ wurde versucht, den jahrzehntelangen Beschwerden der Volksschullehrpersonen Rechnung zu tragen und einen einheitlichen Status für Beamte zu schaffen. Das Gesetz hob die bis dahin bestehenden Unterschiede zwischen den Lehrpersonen der verschiedenen Schulen auf: „Artikel 1. Die Bestimmungen von Artikel 142 des Gesetzes XXXVIII von 1868 über das öffentliche Schulwesen in den Volksschulen, die die Gehälter der ordentlichen und der Hilfslehrer an den Volksschulen regeln, werden auf die ordentlichen und die Hilfslehrer an den von den religiösen Bekenntnissen unterhaltenen Schulen ausgedehnt. Demnach soll das Gehalt des ordentlichen Lehrers an diesen Schulen, abgesehen von einer angemessenen Wohnung und mindestens einem Viertel Morgen Garten, nicht weniger als 300 Forint und das des Hilfslehrers nicht weniger als 200 Forint betragen“ (Gesetz von 1893 XXVI, § 1). Das Gesetz regelte die Besoldung der Lehrpersonen einheitlich. Diese Absicht wurde durch das Gesetz XXVII von 1907 über die Besoldung von Gemeinde- und Kongregationslehrern weitergeführt, das eine einheitliche Gehaltsskala für Lehrpersonen festlegte und ein System von Anreizen für die Lehrerzulagen entwickelte. Darin wurde festgelegt, dass eine Lehrperson ein öffentlicher Beamter ist; sein Arbeitsverhältnis war unbefristet und konnte nur durch eine reguläre Disziplinarstrafe aufgehoben werden; sein Gehalt betrug 1000, 1100 und 1200 Kronen³. Die ungarische Lehrerschaft kämpfte geschlossen dafür, dass ihre Gehälter als Beamte denen von Beamten mit den gleichen Qualifikationen entsprechen sollten. Die Lehrpersonen setzten sich auf verschiedenen Lehrerkongressen und Versammlungen für ihre Interessen ein (Ember, 1913).

Aus zeitgenössischen Quellen geht hervor, dass sich sowohl ungarische als auch deutsche Lehrpersonen über ihre niedrige Bezahlung und ihr mangelndes soziales Ansehen beklagten. In beiden Ländern verbesserte sich der moralische und finanzielle Status der Lehrpersonen langsam. Während des Berichtszeitraums spielte der Staat (die Regierung) eine zunehmend entscheidende Rolle bei der staatlichen

³ Die Einführung der Krone wurde 1892 gesetzlich geregelt. Ein österreichischer Forint war zwei Kronen wert. Ab dem 1. Januar 1900 wurde die Krone das einzige gesetzliche Zahlungsmittel (Szabolcs, 2001).

Besoldung der Volksschullehrpersonen an den öffentlichen Schulen und bei der Beeinflussung der Geschicke des Lehrerberufs zum Besseren.

3. In beiden untersuchten Ländern wurden in der Zeit des Dualismus Organisationen zur Vertretung beruflicher und existenzieller Interessen gegründet. Ein besonderes Merkmal der beruflichen Entwicklung von Lehrpersonen war die soziale Organisation der Lehrpersonen an den Volksschulen, deren Mitglieder sich in verschiedenen Organisationen zusammenschlossen, um die Interessen, Probleme und Erwartungen des Volksschullehrerberufs zum Ausdruck zu bringen und so einen Rahmen für gemeinsames Handeln zu schaffen. Zu den bedeutendsten deutschen Lehrerverbänden gehörte der Deutsche Lehrerverein (DLV), der 1871 in Berlin gegründet wurde und bis 1933 bestand. Der Vorläufer dieses traditionsreichen Vereins war der 1848 in Eisenach gegründete Allgemeine Deutsche Lehrerverein. Der Verein vereinigte Volksschullehrpersonen aus dem deutschsprachigen Raum. Seine Mitgliederzahl wuchs stetig an und erreichte 1914 130 748 Personen, von denen die überwiegende Mehrheit Männer waren (Rissmann, 1908). Mit fast 150 000 Mitgliedern wurde der DLV zur größten Vereinigung von Volksschullehrpersonen in der Weimarer Republik. Zu Beginn des 20. Jahrhunderts wurden in ganz Deutschland Unterausschüsse gegründet. Der Bayerische Lehrerverein, der 1861 in Regensburg gegründet wurde und 1933 fast 9 000 Mitglieder zählte, kann als eine bayerische Unterorganisation des DLV (Deutscher Lehrerverein) angesehen werden, die mit den Sozialdemokraten sympathisierte (Kisling, 2021).

Die konfessionelle Neutralität des 1871 gegründeten Deutschen Lehrerverbandes hielt viele Volksschullehrpersonen, die an kirchlichen Schulen arbeiteten, davon ab, ihm beizutreten. Für sie wurde 1889 der Katholische Lehrerverband des Deutschen Reiches gegründet, der 1927 fast 26 000 Mitglieder zählte. Nur Männer durften sich an der Verbandsarbeit beteiligen. Für die Interessenvertretung der Lehrerinnen stand der 1885 gegründete Verein katholischer deutscher Lehrerinnen zur Verfügung (Küppers, 1975).

Nach dem Gesetz über die Volksbildung von 1868 wurden in Ungarn Vereine verschiedener Art und Organisationen gegründet. Das Volksbildungsgesetz verpflichtete die Lehrer der öffentlichen und staatlichen Grund- und Mittelschulen, in jedem Schulbezirk Lehrervereine bzw. Bezirkskreise zu gründen und sich am Leben der Lehrerverbände zu beteiligen. Die Bezirkskreise waren verpflichtet, zweimal im Jahr eine Lehrerversammlung abzuhalten und die Gesamtheit der Lehrpersonen war verpflichtet, einmal im Jahr eine Versammlung abzuhalten (Ember, 1913; Kelemen, 2007). 1894 wurde der Nationale Verband der ungarischen Lehrervereinigungen gegründet, der als nationale Volksschullehrervereinigung fungierte (Ember, 1913).

Die Maßnahme ermutigte die kirchlichen Behörden, aber auch die konfessionellen Volksschullehrer, ihre eigenen Lehrervereinigungen zu gründen oder wieder zu gründen. Vielerorts ergriffen die konfessionellen Lehrer die Initiative zur Gründung „konfessionsloser“ gemeinsamer Volksschullehrervereine. Diese Verbände bildeten in den folgenden Jahren und Jahrzehnten die Grundlage und den organisatorischen Rahmen für die berufsständische und spätere anwaltschaftliche Organisation des Volksschullehrerberufs (Kelemen, 2007). 1896 wurde eine konfessionelle Landesorganisation auf dem I. katholischen Lehrerkongress gegründet. Der Kongress gründete das Nationale Komitee der katholischen Lehrer und wählte aus den Mitgliedern des Nationalen Komitees den Nationalen katholischen Lehrerrat. Der Nationale Katholische Lehrerrat erfüllte für das ungarische katholische Schulwesen die Aufgabe des Nationalen Rates für das öffentliche Schulwesen, des pädagogischen Hauptorgans der staatlichen Schulverwaltung, das dem Kultusminister unterstellt war. Der Katholische Rat war das vorbereitende und leitende Organ für das öffentliche Leben des katholischen Bildungswesens und das Leben der Volksschullehrerverbände. Er trat viermal im Jahr zusammen (Ember, 1913).

In beiden untersuchten Ländern verfolgten die verschiedenen Lehrerverbände anfangs im Allgemeinen die gleichen Ziele: Selbstbildung, Selbsthilfe, soziale Interaktion, Formulierung gemeinsamer Interessen und deren wirksame Vertretung. Zu ihren charakteristischen Bemühungen und Errungenschaften gehörten beispielsweise die Herausgabe von Zeitschriften und Büchern, die Organisation von Vorträgen, Konferenzen und Kongressen, ein umfassender Austausch mit anderen Organisationen und kompetenten Fachleuten über Fragen der Bildungsentwicklung sowie der Aufbau von Partnerschaften mit internationalen Organisationen (Joó, 2006). Nach dem Ersten Weltkrieg erfuhren diese Berufsverbände einen Wandel. Die grundlegenden Gründe für den Rollenwechsel sind einerseits im ideologisch-politischen Wandel und andererseits in der Neuorganisation des Lehrerberufs zu suchen.

4. Die regionalen und konfessionellen Lehrerverbände hatten im Untersuchungszeitraum in der Regel eine pädagogische Zeitschrift als erstes Zeichen ihrer Tätigkeit. Das Verlagswesen war für die Volksschullehrerverbände ein besonders wichtiger Tätigkeitsbereich, vor allem im Bereich der pädagogischen Fachzeitschriften. Diese Presseorgane waren die Foren, in denen die Fachleute über die Herausforderungen des Berufsstandes diskutierten und auf deren Grundlage die spezifischen Positionen der einzelnen Gruppen festgelegt wurden. Die 1851 gegründete *Allgemeine Deutsche Lehrerzeitung* (ADLZ) war die führende Fachzeitschrift des deutschen Lehrerberufs

und wurde als pädagogische Zeitschrift des 1848 gegründeten Allgemeinen Deutschen Lehrervereins geführt. Sie wurde von August Berthelt, einem deutschen Lehrer und pädagogischen Schriftsteller, herausgegeben und erschien von 1852 bis 1871 in Leipzig. Ihre Leserinnen und Leser waren vor allem Lehrerinnen und Lehrer an Volksschulen. Mit der Gründung des Deutschen Lehrervereins wurde die *Pädagogische Zeitung* als offizielle Zeitschrift des Vereins ins Leben gerufen und erschien von 1871 bis 1919 in Berlin. Daneben existierte die *Allgemeine Deutsche Lehrerzeitung* als pädagogisches Organ des Deutschen Lehrer-Pensionsverbandes weiter. Nach der Reorganisation des Deutschen Lehrerverbandes (DLV) im Jahr 1919 wurde die Zeitschrift mit einer neuen Redaktion versehen und erschien wöchentlich als Nachfolgerin der *Pädagogischen Zeitung* (Bölling, 1978).

Auch in Ungarn ist leicht zu erkennen, dass die Bildungsverwaltung, die Schulaufsichtsbehörde, die Institutionen, die regionalen und die verschiedenen Lehrerverbände sowie die von Zeit zu Zeit auftretenden Berufsorganisationen ihre eigenen Presseorgane geschaffen haben. Ein Beispiel aus dem besprochenen Zeitraum ist die pädagogische Zeitschrift *Ungarische Kleinkindererziehung und Volksbildung* (*Magyar Kisdednevelés és Népoktatás*). Sie wurde durch das königliche Lehrinspektion in Sárvár herausgegeben und erschien als Amtsblatt der Provinzialschulinspektion und des Széchenyi-Kreises von Eperjes. Im Bereich der pädagogischen Literatur sind folgende Publikationen zu nennen: die Zeitschrift *Bildung* (*Nevelés*), herausgegeben vom Allgemeinen Lehrerverein von Máramaros, und die Zeitschrift *Volksunterricht* (*Népoktatás*), die das Amtsblatt des Lehrerverbandes des Komitats Krassó-Szörény (Kollányi, 1906; Hellebrant, 1915) war.

Zwischen 1890 und 1900 wurden 52 neue Zeitungen gegründet, und etwas weniger hörten auf zu existieren. Die parallele Existenz dieser Einrichtungen wurde durch das Gesetz über das öffentliche Schulwesen von 1868 festgelegt (Géczi, 2005). Zwischen 1900 und 1910 nahmen 79 neue Zeitungen ihre Tätigkeit auf, von denen die meisten nur kurze Zeit überlebten. Im Jahr 1900 existierten 20 der 1890 erschienenen Zeitungen nicht mehr. Im Jahr 1890 gab es 49 pädagogische Fachzeitschriften. Es ist nicht möglich, eine genaue Antwort auf die Frage nach der Gesamtzahl der Exemplare dieser Zeitschriften pro Jahr und pro Ausgabe sowie nach der Zahl der Leserinnen und Leser zu geben. Letzteres lässt sich aus sporadischen Angaben ableiten, vermutlich lag die Zahl der Exemplare pro Titel bei einigen hundert und die Zahl der Leserinnen und Leser bei nicht mehr (Géczi, 2007).

Unter den ungarischen pädagogischen Presseorganen sind das *Blatt der Volksschullehrer* (*Néptanítók Lapja*) und die *Ungarische Pädagogik* (*Magyar Paedagogia*) von herausragender Bedeutung. Die

Néptanítók Lapja war die offizielle Zeitschrift der damaligen Regierung. Die erste Ausgabe wurde am 6. Februar 1868 veröffentlicht. Zwischen 1868 und 1874 erschien sie wöchentlich, zwischen 1874 und 1944 dann vierzehntägig. Ihr Gründer war Baron József Eötvös, Minister für Religion und Volksbildung, der mit der Verabschiedung des Volksbildungsgesetzes von 1868 eine neue Ära in der Herausgabe von pädagogischen Zeitschriften einleitete. Die Zeitschrift sollte die Umsetzung des Volksbildungsgesetzes und die kulturelle und pädagogische Bildung der Lehrpersonen fördern. *Magyar Paedagogia* war eine Publikation, die von der Ungarischen Akademie der Wissenschaften unterstützt wurde. Hinter ihr stand eine breit aufgestellte Gesellschaft mit professionellem Ruf, die sich für die Verwirklichung der ministeriellen Ambitionen einsetzte und deren Aktivitäten durch einen akademischen Ansatz kanonisiert wurden, wie Géczi in seiner 2007 veröffentlichten Studie schreibt. Dennoch war allein der Herausgeber für den Inhalt verantwortlich.

5. Ein wichtiges Element bei der beruflichen Entwicklung von Volksschullehrern ist das Entstehen von pädagogischem Fachwissen. In der zweiten Hälfte des 19. Jahrhunderts wurde in beiden Ländern die Pädagogik für Volksschulen entwickelt, die die Grundlage für das Wissen der Fachpersonen bildete. Im Mittelpunkt des Wissens bei der beruflichen Entwicklung von Volksschullehrern standen die praktischen Kenntnisse, Fähigkeiten und Fertigkeiten, die für das Lehren und Lernen erforderlich waren, sowie die praktische Pädagogik, die Lehrmethodik und das Wissen über Kinder. In der Regel beruhte dieses Wissen auf der Tradition, auf den von früheren Lehrergenerationen gesammelten Ideen und auf den Ergebnissen ihrer Erfahrungen aus der täglichen Praxis. In der zweiten Hälfte des 19. Jahrhunderts begann sich die Literatur der Volksschulpädagogik zu entwickeln, zu der auch Bücher über Erziehungslehre gehörten, die mit einem pragmatischen Ziel für die Volksschullehrerbildung geschrieben wurden (Kovács, 2023).

Ab der zweiten Hälfte des 19. Jahrhunderts setzte sich in beiden Ländern im Zuge der Modernisierung des Volksschulwesens mehr und mehr der Grundsatz durch, dass die Qualität des Unterrichts in den Volksschulen maßgeblich von den Schulbüchern der zukünftigen Lehrpersonen und den Handbüchern der Lehrkräfte in den Lehrerbildungsanstalten beeinflusst wird. Im Untersuchungszeitraum wurde eine ganze Reihe ungarischer und preußisch-deutscher Lehrbücher und Handbücher für den Unterricht an den Volksschulen erstellt. Die zunehmende Zahl von Lehrbüchern für die berufliche Entwicklung von Volksschullehrern und zukünftigen Lehrpersonen erlebte in der Regel mehrere Auflagen und sollte die Verbesserung der Qualität der Arbeit der Lehrpersonen unterstützen. Ihre Besonderheit bestand darin, dass sie berufliche Wissensinhalte für Lehrkräfte an

Volksschulen vermittelten. Sie listeten in unterschiedlicher Ausführlichkeit die Erwartungen und Defizite des Lehrers auf.

Schlussfolgerung

Wie aus den obigen Ausführungen ersichtlich wird, begann im Zuge des Modernisierungsprozesses, der im 19. Jahrhundert seinen Höhepunkt erreichen sollte, eine neue Phase in der Entwicklung des europäischen Schulwesens. In der zweiten Hälfte des 19. Jahrhunderts spielten der Wunsch nach beruflichem Aufstieg und das Streben nach sozialem Aufstieg eine Rolle bei der Entwicklung der Identität der ungarischen und deutschen Volksschullehrpersonen. Die Frage der Professionalität wurde für das Selbstverständnis der Berufsgruppe immer wichtiger. Das Bedürfnis, das Sozialprestige und die beruflichen Interessen des Berufsstandes zu stärken, wurde zu einer Forderung der Lehrpersonen an den Volksschulen (vgl. Dombi, 2012).

Dennoch waren Probleme, Beschwerden und Kritik an der Arbeit der ungarischen und deutschen Lehrkräfte ein wiederkehrendes Thema, das u. a. in den Berichten der Inspektoren und den Aussagen der Lehrkräfte erwähnt wurde sowie in den analysierten Lehrbüchern und Handbüchern auftaucht. Die Situation der Lehrpersonen an den Volksschulen war in beruflicher, sozialer und finanzieller Hinsicht weiterhin unbefriedigend. Auch wenn sie ab der zweiten Hälfte des 19. Jahrhunderts zunehmend besser bezahlt wurden, blieben ihre Gehälter unter denen der Gymnasial- oder Hochschulehrpersonen (Kovács, 2023). Die benachteiligte Stellung der Volksschullehrpersonen, die oft aus einer niedrigen, schlecht ausgebildeten sozialen Schicht stammten, wirkte sich auf die Volksschulbildung aus. Erschwerend kam hinzu, dass es in ländlichen Gebieten in der Regel Einraumschulen gab, in denen Schulkinder unterschiedlichen Alters im gleichen Raum unterrichtet wurden. Die heterogene und große Anzahl von Schülerinnen und Schülern stellte die Lehrpersonen vor Herausforderungen, die sie nur schwer oder gar nicht bewältigen konnten. Die Lehrpersonen in den städtischen Schulen waren aufgrund der größeren Anzahl von Klassenräumen und des höheren Einkommens in einer etwas günstigeren Lage. Daher wurde es immer dringlicher, die Qualität der Volksschullehrer Ausbildung zu verbessern. Der Staat hatte ein ureigenes Interesse an der ordnungsgemäßen Ausbildung von Lehrpersonen und konnte es sich nicht leisten, dass die heranwachsende Generation von unzufriedenen, schlecht ausgebildeten Volksschullehrpersonen unterrichtet wurde. Die politischen Entscheidungsträger argumentierten, dass die Ausbildung der Lehrpersonen Auswirkungen auf das Bildungsniveau der Bevölkerung hat (vgl. Herrlitz, Hopf und Titze, 2009).

Auf der Grundlage der Ergebnisse lässt sich feststellen, dass sich die Modernisierung des Bildungswesens und die Entfaltung der Berufsgruppe der Volksschullehrpersonen in Ungarn und in dem als Vorbild dienenden Preußen im betrachteten Zeitraum rasant entwickeln. Die berufliche Entwicklung der Volksschullehrpersonen hat in beiden Ländern im Laufe des Zeitraums zu einer Steigerung der Qualität der Bildung geführt. Einen wichtigen institutionellen Rahmen für die Professionalisierung der Volksschullehrpersonen bildeten die Volksschulen, die Lehrerbildungsanstalten und die Lehrerverbände. Das pädagogische Wissen, das für die Lehrerausbildung entwickelt wurde, einschließlich der pädagogischen Handbücher und Lehrbücher, die für Lehrerkandidaten und Volksschullehrpersonen geschrieben wurden, spielte eine wichtige Rolle bei der beruflichen Entwicklung. So trug beispielsweise die zunehmende Zahl von Lehrbüchern für die Volksschullehrerausbildung zur Qualitätssteigerung bei.

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Gesetze

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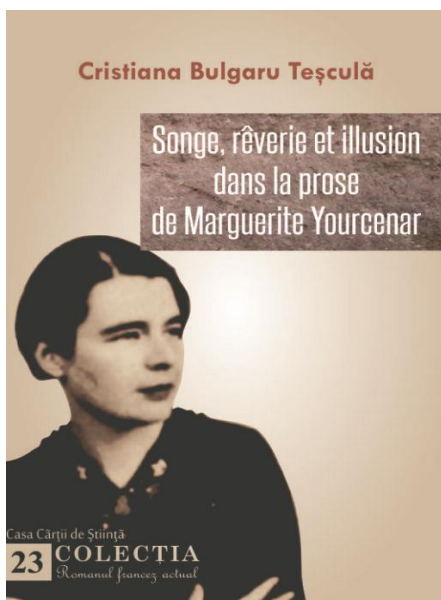
REVIEW ARTICLES

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Decoding the Dream : Cristiana Bulgaru Teșculă: *Songe, rêverie et illusion dans la prose de Marguerite Yourcenar*

Bogdana-Cristina-Laura Nedelcu*

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Cristiana Bulgaru

Teșculă's work *Songe, rêverie et illusion dans la prose de Marguerite Yourcenar* (*Dream, Rêverie and Illusion in Marguerite Yourcenar's Prose*, Editura Casa Cărții de Știință, Cluj-Napoca, 2015) is dedicated to one of the most influential writers of the twentieth century and aims to provide the readers with a means to decode the enigmas hidden inside Yourcenar's prose by exploring and analysing a few of the most relevant texts (the personal dreams transcribed by the author herself) included in the first edition of the volume *Les Songes et les Sorts*, published in 1938.

Since few literary studies dedicated to Marguerite Yourcenar's literary universe address the problem of dreams and the way they are

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defined and presented in the collection *Les Songes et les Sorts*, the author of this work has undertaken the difficult task of decoding the Yourcenarian dream by investigating specific aspects of her prose, in order to clarify the author's choice to present the readers with a global perspective on dreams, and not just the formal classification and common aspects of the personal dream, or the identification of the themes, motifs, similarities between the texts from *Les Songes et les Sorts* and other Yourcenarian texts.

This valuable study explores and minutely analyzes specific theoretical and formal aspects, starting with Marguerite Yourcenar's view on oneirism as described in the introduction of the first edition of the collection *Les Songes et les Sorts*, as well as in the second edition of the same volume, published in 1991, four years after her death. Because Yourcenar's theory applies exclusively to the nocturnal dream, Cristiana Bulgaru Teșculă's scientific aim is to open new paths of research of this complex topic, in order to establish at least one original new definition for the diurnal dream, which she defines as *rêve-rêverie* and for the voluntary illusion, which she calls *illusion volontaire*. At the same time, Cristiana Bulgaru Teșculă identifies, illustrates and comments on the thematic and formal similarities between *Les Songes et les Sorts* and other literary texts written by Yourcenar (*La maison brûlée* – belonging to the *rêves liriques ou hallucinés*, *Le rêve du 4 au 5 juin 1979* – where the author applies the formula of the *rêves commentés*), offering an original and extensive overview and analysis of Marguerite Yourcenar's own theory on oneirism.

Another significant aspect which is brought to the reader's attention by Cristiana Bulgaru Teșculă is the discrepancy between the nature of Yourcenar's personal authentic dreams from her youth, *les rêves liriques ou hallucinés* from the '30s and *rêves commentés* dating from the last stage of her life, between the '60s - '70s. The first ones are inspired by various elements belonging to different literary subjects and motifs, such as the fast succession of events, the passion for travel and the inclination for risk identifiable in the love story, the description of detective scenes, specific to the police novel, the vampire figure from the gothic novel. The second ones are amended by the author's own personal logic considerations on romantic walks, landscapes or autobiographical sequences.

Cristiana Bulgaru Teșculă's thorough analysis of Yourcenar's prose reveals new paths to discover and freely use the keys to open new imaginary doors to Yourcenar's prose, by using an extraliterary scale for describing dreams, while choosing a global perspective on the writer's own view of oneirism.

Les Songes et les Sorts contains an extensive introduction and twenty-two personal dreams dating from her youth, spanning over five

years (between the age of twenty-eight to the age of thirty-three) in which Marguerite Yourcenar provides the readers with a genuine reading guide, in which she accurately and comprehensively explains her theory of oneirism and the change of perspective on dreams, by highlighting the main elements of the stories that defined her ideas. According to the author, these transcriptions can be considered poems in prose because of their structure, atmosphere and visual effects, denying the authentic oneiric features of the texts. Later, Yourcenar realized she committed an error in depicting her texts as poems in prose and decided to publish a second version of *Les Songes et les sorts*, to which she planned to include fragments from *Mémoires d'Hadrien* and *L'Œuvre au Noir*.

Seven years before her death, Yourcenar expressed in her work *Les yeux ouverts* her intention to publish an extended volume containing the transcriptions of a few dreams dating from the last stage of her life, accompanied by notes and comments which were meant to better explain her later experiences as a dreamer and the contexts that led to the change of her perspective on the respective texts. In doing so, Yourcenar changes her position within the narrative sequences, depending on the given circumstances. She claims to be endowed with *le don de voir* (the gift of seeing, as she calls it in the introduction to the 1938 edition of *Les Songes et les Sorts*), thus proclaiming herself as the main authority who can alter the course of action and the destinies of the characters.

Yourcenar's vision on the multiple layers of dreams included in the first edition of *Les Songes et les Sorts* is traceable in the later periods of her creation, be it in fiction or in autobiographical texts, which are built on her personal authentic dreams and on the fictional dreams of her characters. Yourcenar's *rêve lyrique ou halluciné* is a means of revealing her inner self to the reader, by defining herself as *lyrique ou halluciné* dreamer or dream transcriptor, leaving aside her vocation of memorialist. This is the reason why in the prose of Marguerite Yourcenar there are many narrative sequences in which certain themes, motifs, characters and even dream fragments intertwine with the personal dream of the author erasing the imaginary line between reality and the oneiric realm.

Furthermore, Marguerite Yourcenar's view on dreams is compared by the author of this study with one of the many scientific definitions, more precisely with the one given by Jacques Montangero, a renowned specialist in cognitive psychology. According to Montangero, dreams are a series of visual representations appearing during sleep, inducing a state of visual hallucination. In his work *Rêve et cognition*, published in 1999, he expresses his perspective on dreams and establishes a descriptive pattern for dreams, focusing – just like Marguerite Yourcenar – on the similarities between the scientific and

literary aspects and various coordinates, such as time, space, action, characters and so on.

This may be one of the reasons why Marguerite Yourcenar includes a historical timeline of the evolution of dreams in *Les Songes et les Sorts*, choosing as main reference points the Greek Antiquity, the Classicism and the Surrealism, analyzing her personal dreams from the '30s and from the '60s - '70s, as well as the fictional dreams of characters such as Hadrien, Zénon and Lazare, the protagonists of the novels *Mémoires d'Hadrien* and *L'Œuvre au Noir*, and last but not least, of the short story *Une belle matinée*. In these texts the readers are helped by the author to identify various functions of dreams, presented as premonitions or means of anticipating the characters' death or to predict their personal fate and destiny. Thus, in order to build an imaginary bridge between the authentic dream and the fictional one, the author inserts the reveries and voluntary illusions of the characters in the storyline of *Denier du rêve*, where the dream becomes a means of rewriting the present.

All the characters from Yourcenar's works and the author – dreamer herself are united in the struggle to find freedom and face their fears on the journey to the center of their own inner universe. The oneiric realm can be as dangerous and treacherous as the desert or as the abyss of the oceans. It is our choice as readers to take the risk of exploring and challenging the unknown depth of the human soul.

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