Latvia University of Agriculture
Faculty of Social Sciences

7th Annual International Scientific Conference

„New Dimensions in the Development of Society"
Proceedings

Dedicated to the 10th anniversary of the Faculty of Social Sciences
October 6 – 7, 2011, Jelgava, Latvia

Proceedings "New Dimensions in the Development of Society 2011"

Responsible for the edition: Gunārs Brāzma
English language review: Andris Gaters
Layout: Linda Feldmane
Printed in SIA Drukātava
Printed copies: 120

Editorial Office
Latvia University of Agriculture
The Faculty of Social Sciences
Lielā Street 2, Jelgava
LV-3001, Latvia
Phone: +371 630 21821
Fax: +371 630 21821
E-mail: szfdek@llu.lv

ISBN 978-9984-48-052-7
E-ISSN 2255-873X

© Latvia University of Agriculture, 2012

Conference Scientific Committee

Chairman of the Committee: Assoc. prof., Dr.phil. V. Bariss, Latvia University of Agriculture, Latvia
Vice-chairman of the Committee: Prof. Dr. J. Hobrough, Surrey University, Great Britain
Prof., Dr. W. Domaszewicz, University of Varmia and Masuria, Poland
Prof., Dr. V. Majerova, Faculty of Rural Sociology, Czech University of Life Sciences, Czech Republic
Prof. Dr. P. Rivža, Vice-rector of Research, Latvia University of Agriculture, Latvia
Assoc. prof., Dr. R. Povilaitis, Lithuanian University of Agriculture, Lithuania
Assoc. prof., J, Ābele, Latvia University of Agriculture, Latvia
Assoc. prof., Dr.hist. J. Ķusis, Latvia University of Agriculture, Latvia
Assoc. prof., Dr.paed. S. Bremze, Latvia University of Agriculture, Latvia
Assoc. prof., Dr.paed. D. Grasmane, Latvia University of Agriculture, Latvia
Assoc. prof., Dr.phil. G. Brāzma, Latvia University of Agriculture, Latvia
Doc. Emeritus M. Krūzmētra, Latvia University of Agriculture, Latvia
Doc., Dr.phil. L. Leikums, Latvia University of Agriculture, Latvia
Doc., Dr. paed. L. Turuševa, Latvia University of Agriculture, Latvia
Doc., Dr.phil. I. Ozola, Latvia University of Agriculture, Latvia

Editorial Board

Chairman: Assoc. prof., Dr.phil. G. Brāzma, Latvia University of Agriculture, Latvia
Assoc. prof., Dr.paed. S. Bremze, Latvia University of Agriculture, Latvia
Assoc. prof., Dr.paed. D. Grasmane, Latvia University of Agriculture, Latvia
Assoc. prof., PhD SW S. Dobelniece, Latvia University of Agriculture, Latvia
Doc., Dr.sc.soc. L. Rasnača, Latvia University of Agriculture, Latvia

All papers included in proceedings are reviewed.

Abstracting and indexing:
Thomson Reuters Web of Science ISI Web of Science
EBSCOhost databases
AGRIS

Attention! The databases select the papers from the proceedings for including them in their data bases after individual qualitative examination.

Contents

Labour market and public administration

Bubeníček Václav, Kubálek Michal
Interpretation of Local Political Conflicts 9

Cmejrek Jaroslav, Rezanková Jirina, Černy Jaroslav
Integration of foreigners in local communities 17

Cmejrek Jaroslav, Urbanova Martina
Municipality websites as a communication channel in the central Bohemia region 26

Lescauskaite Vaida, Mazylis Liudas
Representation of interests of Lithuania's sub-national actors at EU level 34

Line Antra
Strategic management of trade unions: necessity and potential 42

Mazylyte Liucija, Povilaitis Romualdas
Interest representation at the EU level: the case of Lithuania's environmental interest 50

Mirlina Līga
Valdības publisko attiecību loma valsts pārvaldes optimizācijas nodrošināšanā
Role of government public affairs in optimization of public administration 57

Parker Pierce
Latvian migrant workers' experience of discrimination in the republic of Ireland 66

Yorgova Yulia
A model of operations capacity planning and management for administrative service 76

Innovations and sustainability as development factors

Avotiņš Valdis, Jarohnoviča Nataļja
Entrepreneurial university model: case of knowledge flow analysis in VUC 84

Barisa Laima
Jelgavas novada ilgtspējīga attīstība novada pārvalžu pārstāvju skatījumā
The sustainable development of the Jelgava local minicipality from the point of view of minicipality representatives 94

Bremze Sarmīte, Jefremovs Vladimirs
Struktūrfondu nozīme uzņēmējdarbības attīstībā
The role of EU structural funds in business development 104

Emse Anita, Vaidesvarans Sundars
E-Learning – A contemporary tertiary education solution in the context of globalisation 114

Enkuzena Signe
Barriers for the use of the traditional training evaluation approach in enterprise 123

Haite Inese
Inovatīva pilsēta – teritoriju attīstības veicinātāja
Innovative city – promoter of territory development 134

Krūzmētra Maiga
NGO as a significant element of Helix model system promoting innovations in rural areas 144

Kuura Arvi
Project management and entrepreneurship: a tale of two "Cinderellas" 154

Ķusis Jānis
Ziemeļvidzemes novada pilsētu attīstība pašvaldības darbinieku skatījumā
Northern Vidzeme municipal development from the perspective of the regional governmental employees 162

Litavniece Lienīte
Evaluation of the town's attractiveness: a case study of the Balvi city 170

Noppel Airi, Kuura Arvi
Project management competences needed: an analysis of preliminary wisdom of application of Estonian Reconstruction Act 180

Riekstiņa Liene, Avotiņš Valdis
New Business Idea Development methodology: Case of Latvia and Estonia 187

Salmane-Kuļikovska Ieva, Dobelniece Signe
Information sources about medicines used in case of childen's rhinitis 193

Sudraba Velga, Mārtinsone Kristīne
Social intelligence indicators for addition disorder patients 201

Tovstuļaks Juris, Avotiņš Valdis, Jarohoviča Nataļja
Uzņēmumu tehnoloģiskās absorbcijas spējas analīzes iespējas Latvijā
Enterprise technology absorption readiness assessment model in Latvia 215

Zablockis Artis
Financing of innovations: problems and opportunities in Latvia 225

Place, identity and globalization in society development

Austruma Spodra
Globalizācijas procesu ietekme uz skolas jauniešu vērtību izvēli
Impact of globalization processes on the choice of values of young people 233

Bernini Alberto
Social capital and local identity in the society of globalization 241

Brokāne Larisa
Etniskās identitātes veidošanas aspekti multietniskā vidē
Ethnic identity formation aspects in multiethnic environment 248

Kāposta Iveta
Izglītības iestādes vieta mācību reģionā
The place of educational institutions in learning region 258

Krusteva Lulivera
Cultural identity and media coverage 266

Lisý Ján
The topicality of social market economy in time or globalization (possibilities and limits of economic and social policy) 274

Maříková Pavlína, Herová Irena
Local development – multiple views 281

Muchová Eva
Optimum currency area theory – a critical view 290

Rasnača Līga
Flexibility in Labour Market Relations between Employers' and Employees' 298

Sokolowski Marek
Mass culture versus popular culture 308

Tomaszewska-Hołub Beata, Domaszewicz Waclaw
Humanities grey hairs – aspects of the ageing of society 316

Challenges and solutions in education

Ate Inese, Liepiņe Kristīne
Mind maps and their usage to develop students' foreign language skills and competence 324

Balama Vita
Factor of acculturation and its management with foreign students..... 333

Bērtaitis Imants
Analysis of professional competences of labour protection specialists..... 341

Bremze Sarmīte
Pedagogical aspects of e-learning in higher education..... 348

Civzele Olga, Turusheva Larissa
Foreign language as a means of communicative competence..... 357

Janmere Lana
Mācību priekšmeta ”Sociālās zinības” sasniedzamie rezultāti vecāku skatījumā
Achievable outcomes of ”Social sciences” from the parents’ point of view..... 366

Kirila Kitija, Kitija Namniece
E-studiju mācību formas perspektīvas Jelgavas vidusskolu skolēnu izpratnē
The perspectives of e-learning forms: Jelgava high school students’ perspectives..... 376

Knope Ieva
Studentu vajadzības profesionālās angļu valodas studiju kursā LLU
Students’ needs in ESP at Latvia University of Agriculture..... 385

Maļinovska Larisa, Mežote Anete, Ozola Inese
Student conferences as a means for developing academic skills in foreign languages..... 392

Tamberg Taavi, Soosaar Reet, Kuura Arvi, Alajõe Sulev
Development of project management and IT competences through integrated learning..... 400

Volāne Elita
Modern teaching of home economic and technologies in Latvia: theoretical and practical aspects..... 407

Vronskaya Natalia
Study program “Home environment and informatics in education” developing opportunities..... 416

Zeiberte Līvija
Pedagoga profesionalitāte un nepārtraukta profesionālā pilnveide
Teacher’s professionalism and continuous professional development...... 425

Ethical dimension in the development of society

Grabowski Adam
Civil society crisis in Poland and attitudes towards politicians...... 434

Leikuma Ināra
P. Birkerta „Psiholoģija" (1921) jaunu dimensiju kontekstā
P. Birkerts' "Psychology" (1921) in the Context of New Dimensions 441

Leikums Leonards, Brāzma Gunārs
Filozofijas loma mūsdienu sabiedrībā
The role of philosophy in contemporary society.....450

Makarevičs Valērijs
The problem of personality and professional indentity in Plato's works 460

Poļaks Rihards
Society "for" and "against" legalization of euthanasia 468

Živitere Marga, Rjaščenko Viktorija
The barrier-free workplace for disabled people 476

INTERPRETATION OF LOCAL POLITICAL CONFLICTS

Václav Bubeníček, Assistant Professor, Department of Humanities, Faculty of Economics, Czech University of Life Sciences,
Kamýcká 129, 165 21 Prague 6 – Suchdol, e-mail: bubenicek@pef.czu.cz.
Michal Kubálek, Assistant Professor, Department of Humanities, Faculty of Economics, Czech University of Life Sciences,
Kamýcká 129, 165 21 Prague 6 – Suchdol, e-mail: kubalek@pef.czu.cz.

Abstract. The article is a case study of the political process in small municipalities of the Czech Republic. The question of the existence and character of cleavages is investigated on three levels. On the example of one municipality, the premises of the politological theories involved in the function of political systems in Czech small municipalities, while being focused on conflict and its nature, are verified on the basis of quantitative data and qualitative research. The character of actors of the conflict in municipalities and collective legitimacy of disputes are then further investigated. The results of the study, which presents a gradually improving specification of the interpretation of the cleavage in municipalities, lead us to the question of the possibilities of applying individual theoretical approaches in a given, specific area of investigation.
Keywords: cleavage, conflict, local political system, plurality, small municipality, legitimacy.

Introduction

Research into Czech communal politics focused on factors explaining the nature of local political systems is mainly aimed at the study of strategic systems. One of the first Czech politological studies focused exclusively on the possibility to analyse the static forms of local party systems – interpretation of election results (e.g. Hudák, Jüptner, Svoboda 2003; Balík 2003), the nature of local parties (Čmejrek 2003; Šaradín, Outlý 2004 and others), and the influence and construction of a communal election system (Outlý 2003; Bubeníček 2004). Current analyses also followed a number of sociological studies, which in examining the social aspects of the Czech local politics address the issue of political culture (e.g. Vajdová 1996; Vajdová, Kostelecky 1997), social networks (Buštíková 1999a, 1999b), attitudes of local politicians and their role in communal politics (Hanšpach 1992; Vajdová 1995; Illner 2001; Ryšavý 2009 and others), etc. They focus on the factors influencing not only the formats of municipal party systems, but also their mechanisms that define functional models of the political systems themselves (see Jüptner 2006: 111). This is essentially a study of communal coalitions (e.g. Jüptner 2001, 2004, 2006; Ryšavý 2006; Balík 2005b; 2008), the roles of local political elites (Ryšavý 2004, 2006; Kubálek 2006), the continuity of political representation (Čmejrek, Čopík 2009), about the problem of political participation (Čmejrek 2005, 2008), voting behaviour (Kopřiva 2006), local democracy (Illner 2006; Valeš 2007; Bubeníček 2010; Čmejrek, Bubeníček, Čopík 2010), or the nature of the Czech municipal politics as a whole (Čmejrek 2008; Balík 2009).

The political environment of Czech small municipalities is mainly characterized by instability of the local party systems or even the absence of any local party structures (see e.g. Jüptner 2006; Balík 2008; Čmejrek 2003; Bubeníček 2010). From the given fact arises a complicated comprehension of the most common research subject - interpretation of the communal election results – this also tends to be the reason why small municipalities often do not become the subject of research exploration. Among other things, this may be a consequence of occasional tendencies to simplify the research of communal politics of small municipalities in the Czech Republic, as described by Stanislav Balík: *"It makes no sense to examine small municipalities precisely because of their smallness, from which mainly arises the personal nature of local politics, which is in fact not politics, but common care for the development of municipalities without a political context ..."* (Balík 2008: 7). Generally, it is therefore assumed that the local government of a small municipality consists mainly of a kind of "maintenance" activities (see Jüptner 2001: 156), but this may contest the very essence of political nature of communal politics (see Balík 2005a: 163). The author of the above quotation refuses the general argument of the apoliticalness of communal politics (see Balík 2009: 217-218), but with the exception of very small municipalities, which, as he says, "*... even if they wanted to, they do not have enough funds to fulfil the expectations of their citizens and representatives"* (Balík 2009: 219), and he suggests that the politological research of Czech small municipalities focuses rather on exploring local *policy* (Balík 2008: 7-8), although he does adds that the given assertion, in view of the number of small municipalities, may be far too general, and unfair toward the given type of municipality (Balík 2008: 7). It is perhaps because small municipalities actually make up the majority of the total number of Czech municipalities that researching them makes sense - so not because of their small size, but mainly because of their frequent occurrence. Understanding local political phenomena in small municipalities can help with a more comprehensive understanding of the municipal political environment in the Czech Republic as a whole.

Additionally, if we start from a three-dimensional concept of politics as *policy* implementation through *politics* based on *polity* (see e.g. Fiala, Schubert 2000: 19), then even the decision-making of local communities represented by local political institutions (*polity*) on the future development of municipalities (*policy*) must have a legitimate political dimension (i.e. *politics*). Otherwise, we could argue the necessity of the very existence of local government decision-making bodies. Not all small municipalities are faced with a lack of enough funding, and if so, then a decision on the allocation of even the minimum funds can have significant political nature.

The concept of a Czech communal political environment as an environment free of political content is in many cases erroneous (see Bubeníček 2010), although the specifics of individual functional models of local political systems of small municipalities are so different from the political environments of large cities that their research requires a certain adaptation of established methodological procedures of researching political phenomena and commonly applied politological theories that cannot be mechanically transferred on the local level.

The importance of exploring local politics also consists of the possibility of verifying the methodological and theoretical approaches used when studying national political process. At the same time, we can also encounter cases where political actors at the local level use tactical methods of conduct which they retroactively apply on a central level. For this reason, the study can be regarded as suggestive in terms of small municipalities. The submitted contribution thus represents an additional topic into the discussions concerning the possibility of the exploration and interpretation of political phenomena - in the given case of political conflicts – on the lowest political level.

Research Methods

Possible alternatives of conflict research in small municipalities can be demonstrated using the analysis of the political environment of the municipality of Doubice (Děčín district) (Bubeníček, Kubálek 2010), which, with its 105 inhabitants (2010) is among the smallest municipalities in the Ústí nad Labem Region.

The basic aim of this case study of the small municipality was to explore and interpret the local cleavage and its implications. The study was based on long-term research, and the argument and solution branches out into three levels. The purpose of this step was to show how different theoretical and methodological approaches used in studies of communal policy processes can contribute to the eventual refinement of conclusions, and also verify these approaches in a case study.

On the first level, this research of Doubice was perceived as an instrumental case study. The aim was to evaluate the use of certain existing theories of the communal political process, as they were presented in various relevant studies in recent years (Balík 2008, 2009; Jüptner 2004; Ryšavý 2006; Čmejrek, Bubeníček, Čopík 2010 and others), which in their majority use the theoretical concept of researching politics on a national scale. In the given case, the resulting conflicts in terms of the impact of individual interests in the local political process were examined. On this level, the basic socio-demographic and electoral data of monitored community was utilized.

It was an instrumental case study on the second level as well. Here, however, the used and evaluated concept is the theory of Václav Bubeníček on the predominant nature of the cleavage specifically in small municipalities (Bubeníček 2010). Basic data was also used here, but also the results of previous studies, which were based primarily on a semi-structured series of interviews with representatives of local election parties in the periods around the individual communal elections.

The third level constituted a unique case study. It was based on an analysis of the discourse in semi-controlled interviews that were essentially carried out using an accepting interview method (see Kaufman 2010). The interviews were also aimed at identifying the main cleavage in the municipality, self-understanding and interpretation of the actors of the conflict and identification of potential group interests that are reflected in it. Selected respondents could be summarized with some exaggeration using the term "local notables" – these were the most active participants in local political and social life, but also informal authorities in the municipality.

Characteristics of a municipality

Like other municipalities of the so-called Sudetenland, the removal of almost all the local German population in Doubice occurred after World War II. Before the end of the war, the population of the municipality numbered approximately 800 people. Three factories, several restaurants and small entrepreneurs operated in the municipality, and a there was a school in the centre of the village. After the third removal of the German population in 1946 and the arrival of new residents (mainly from Dymokury near Poděbrady and Královice near Říčany) the population was approximately 400 persons (Doubice Municipal Chronicle 1945 - 2001). The two original factories gradually stopped operating (one became a local cinema) and a II. type co-operative was established in the municipality. Several organizations operated here which took care of local social life. In interviews, many residents of the epoch considered this the "golden age" of Doubice. A significant decline occurred in the municipality in 1975 when the last factory stopped being operated and the municipality came under the administration of the neighbouring city of Krásná Lípa. Approximately 110 permanent residents lived in the village at that time. In 1992, a local referendum was held on secession of the municipalities from Krásná Lípa in which 41 of a total of 47 voters in a ratio of 32 to 9 were in favour of restoring independence to Doubice, and this took place on January 1st of the following year (Doubice Municipal Chronicle 1945 - 2001). With 64 inhabitants, Doubice became the smallest independent municipality in the region. Due to its advantageous location on the border between two protected landscape areas and the Czech-Saxon

Switzerland National park, the economy of the municipality began to focus on tourism[1]. At present (2011), there are 6 restaurants, several apartment hotels and one hotel (in the building of the former elementary school). In addition to aforementioned, there are also 2 permanent food shops and several small businesses.

Results and Discussion

The question of examining cleavage in small municipalities in the Czech Republic is, up to a considerable point, a question of the chosen theoretic and methodological approach. In this case the cleavages were examined using the example of the municipality of Doubice on three gradual levels. The first approach is based on one of the "traditional" theories of the communal political process which assume for small municipalities basically situation political conflicts arising mainly in matters concerning financing and related specific political interests. The case study of Doubice basically confirmed the validity of such an approach – political participation grew in the municipality during the periods of two significant conflicts, the first one concerning the sale of municipal land lots and, during the second stage in relation to the draft of the territorial plan. In the municipal election before which these matters emerged, it is possible to talk, from the viewpoint of the party system, about the very competitive nature of the local politics. However, certain presumptions are hidden in this approach, for example that the participants are rational, individual actors following their own interests. A certain smaller ability of the given theory to identify collective actors and to further analyse the political course of events during the periods of non-competition election results from the above. The approaches of the first level are therefore suitable above all for comparative studies, and to differentiate the municipalities with a standard competition-type party system from municipalities that require further examination (here, mainly smaller municipalities come in question).

On the second level of examination, the theory on the specific nature of the cleavage in small municipalities presume the existence of a long-time conflict between two visions of the future development of the municipality, or between the tendency to somehow petrify the local sociability, and between the effort to further develop the municipality, be it at the expense of more changes. Using this approach it was possible to identify collective actors of such dispute in Doubice

[1] Doubice was in the past referred to as a gateway to Czech-Saxon Switzerland and became a recreational resort which was recommended according to preserved documents as an ideal environment for people with nerve sickness, and so was earned the designation of the Brain Spa (Chmelík 1995), which is currently used by representatives of the municipality and operators of local recreational facilities as a major attribute in promoting the community.

("locals" and "cottagers"), as well as its permanency. A certain presumption of the given theory is a rather strong tendency to prevent that conflict from crossing certain limits which could endanger the independence of the municipality or the basic "game rules" within which this conflict is running. It was possible to confirm the aforementioned presumption within the examination of the Doubice political process – despite the outlasting basic cleavage, compromises were reached in the cases when a certain individual actor represented such a danger. In general, it is possible to summarize that the aforementioned theory was validated in the case of Doubice as a potentially suitable instrument for further research of small municipalities.

On the third level, we speak of a unique case study of a small municipality. The aim was to ascertain how the local political process is understood by its actors themselves, and then to interpret the conflict through this self-understanding. The resulting findings deepen and up to a point exceed, but they mainly complement the conclusions acquired on the previous levels of examination. The existence of a significant cleavage identified on the second level was confirmed, but we have to state that this cleavage does not always culminate in an organizational expression (election party) and the respective political acting, but it often shows only on a special-interest or symbolic level. Therefore, it is not of the "cleavage" nature but it is on the other hand reflected by the participants as absolutely essential: due to this special nature, the authors propose to label the given cleavage as a "rupture" in the municipality of Doubice. Furthermore, the conclusions of the second level about the acceptability of situation compromises across the rupture were confirmed, but it is possible to complement them with another result of the examination – in general a less precise borderline between individual groups (actors of the conflict), as well as their internal structures so that some sub-groups (i.e. the "construction lobby") can, at a certain moment, find themselves at the intersection" of collective actors. A specific finding is the fact that in addition to the clash of the vision of the further development, in the case of Doubice we have an even deeper and less recognizable conflict that is harder to recognize – a dispute asking "who is the real resident of the municipality" and who thus has the appropriate legitimacy to act on its behalf (related to collective actors regardless the specific composition of the local town council). The actors were able to develop remarkable legitimizing theories supporting their claims; these legitimizing stories in essence relate to the past of the municipality during the second half of the twentieth century but, at the same time, they can incorporate even parts (or at least expressions) of political narrations from the country-wide political arena. Therefore, it is possible to say that the rupture, in a simplified meaning, is also a clash of two communities, "two Doubices" projected into the past to secure for the collective actors exclusive legitimacy to act in the municipality itself and,

simultaneously, to provide a meaningful justification of their common past. It is apparent that this conflict could not have arisen if there were not a very individual and specific history which Doubice experienced in the 20th century. This is also the reason why the local cleavage has the aforementioned form of a "rupture".

Conclusions

The article introduced one of the possible interpretations of local political conflicts on the example of a community study of one small village in the Czech Republic. An important result is a complex and ambiguous form of local cleavage which can be interpreted in different levels of generality. On the one hand it is possible to perceive this conflict as a clash of individual interests, on the other side the cleavage can be understood as a manifestation of deep-rooted conflict in the community based on the historical development of the municipality. The conclusion of the examination therefore emphasizes a certain importance of individual and specific examination of cleavage in individual small municipalities, and a certain caution when generalizing such findings.

References

1. BALÍK, Stanislav (Ed.) (2003). *Komunální volby v České republice v roce 2002*. Brno: Mezinárodní politologický ústav Masarykovy university v Brně. ISBN 80-210-3211-1.
2. BALÍK, Stanislav (2005a). Metodologie výzkumu komunální politiky. In *Víceúrovňové vládnutí: teorie, přístupy, metody*. Eds.: Fiala, P.; Strmiska, M. Brno: ISPO FSS MU, Centrum pro studium demokracie a kultury. ISBN 80-7325-074-8.
3. BALÍK, Stanislav (2005b). Modely exekutivních koalic na komunální úrovni. In *Evropeizace. Nové téma politologického výzkumu*. Eds.: Dančák, B.; Fiala, P.; Hloušek, V. Brno: Mezinárodní politologický ústav Masarykovy university v Brně. ISBN 80-210-3865-9.
4. BALÍK, Stanislav (2008). *Česká komunální politika v obcích s rozšířenou působností. Koalice, voličské vzorce a politické strany na místní úrovni v letech 1994 – 2006*. Brno: CDK. ISBN 978-80-7325-144-4.
5. BALÍK, Stanislav (2009). *Komunální politika. Obce, aktéři a cíle místní politiky*. Praha: Grada. ISBN 978-80-247-2908-4.
6. BUBENÍČEK, Václav (2004). Komunální volební inženýrství. In *Sborník příspěvků z doktorandského semináře 2004*. Praha, February 17, 2004. Praha: PEF ČZU v Praze. ISBN 80-213-1150-9.
7. BUBENÍČEK, Václav (2010). *Lokální modely demokracie v malých obcích ČR*. Dissertation thesis. Praha: Katedra humanitních věd, Provozně ekonomická fakulta, Česká zemědělská univerzita v Praze.
8. BUBENÍČEK, Václav; KUBÁLEK, Michal (2010). Konfliktní linie v malých obcích. *Acta Politologica*, vol. 2, no. 3. ISSN 1803-8220.
9. BUŠTÍKOVÁ, Lenka (1999a). Analýza sociálních sítí. *Sociologický časopis* 2/1999, ISSN 0038-0288, s. 193-206.
10. BUŠTÍKOVÁ, Lenka (1999b). Známosti osobností lokální politiky. *Pracovní texty/Working Papers* 99:3. Praha: SOÚ AV ČR.
11. ČMEJREK, Jaroslav (2003). Lokální a regionální politické stranictví v ČR. In: *II. Kongres českých politologů*. Praha, September 5 – 6, 2003. Eds.: Dvořáková, V.; Heroutová, A. Praha: Česká společnost pro politické vědy. ISBN 80-902176-3-X.
12. ČMEJREK, Jaroslav (2005). Specifika komunální politiky v malých obcích ČR. In: *Evropeizace. Nové téma politologického výzkumu*. Eds.: Dančák, B.; Fiala, P.; Hloušek, V. Brno: Mezinárodní politologický ústav Masarykovy university v Brně. ISBN 80-210-3865 9.
13. ČMEJREK, Jaroslav (2008). *Obce a regiony jako politický prostor*. Praha: Nakladatelství Alfa. ISBN 978-80-87191-00-4.

14. ČMEJREK, Jaroslav; BUBENÍČEK, Václav; ČOPÍK, Jan (2010). *Demokracie v lokálním politickém prostoru*. Praha: Grada Publishing. ISBN 978-80-247-3061-5.
15. ČMEJREK, Jaroslav; ČOPÍK, Jan (2009). Kontinuita a diskontinuita ve vývoji lokální politické reprezentace. *Acta Politologica*, vol. 1, no. 3. ISSN 1803-8220.
16. FIALA, Petr; SCHUBERT, Klaus (2000). *Moderní analýza politiky. Uvedení do teorií a metod policy analysis*. Brno: Barrister & Principal. ISBN 80-85947-50-1.
17. HANŠPACH, Dan (1992). Sociální a politický profil místních politiků. *Data & Fakta 16*. Praha: Sociologický ústav AV ČR.
18. HUDÁK, Jakub; JÜPTNER, Petr; SVOBODA, Jiří (Eds.) (2003). *Komunální politické systémy*. Praha: Filozofická fakulta Univerzity Karlovy. ISBN 80-7308-056-7.
19. CHMELÍK, Otto (1995). *Doubice – pokus o historický obraz části českokamenického panství*. Bachelor thesis. Ústí nad Labem: PedF UJEP.
20. ILLNER, Michal (2001). Formování lokálních mocenských elit se zvláštním zřetelem na úlohu starostů. In Mojmír Hampl et al. *Regionální vývoj: specifika české transformace, evropská integrace a obecná teorie*. Praha: PřF UK, Katedra sociální geografie a regionálního rozvoje, s. 251–274.
21. ILLNER, Michal (2006). Velikost obcí, efektivita jejich správy a lokální demokracie. In: *Autonomie a spolupráce: důsledky ustavení obecního zřízení po roce 1990*. Eds.: Vajdová, Z.; Čermák, D.; Illner, M. Praha: Sociologický ústav AV ČR. ISBN 80-7330-086-9.
22. JÜPTNER, Petr (2001). Komunální koalice a politické modely. *Politologická revue 2001/2*. ISSN 1211-0353.
23. JÜPTNER, Petr (2004). Komunální koalice a politické modely. *Politologická revue 2004/2*. ISSN 1211-0353.
24. JÜPTNER, Petr (2006). Konfrontace teorie koalic s lokální politikou. In *Koalice a koaliční vztahy*. Ed.: Cabada, L. Plzeň: Aleš Čeněk. ISBN 80-7380-004-7.
25. KAUFMAN, Jean-Claude (2010). *Chápající rozhovor*. Praha: SLON. ISBN 978-80-7419-033-9.
26. KOPŘIVA, Radek (2006). Možnosti aplikace modelů stranické identifikace v podmínkách lokálního politického procesu. In: *III. Kongres českých politologů*. Eds.: Němec, J.; Šůstková, M. Praha, Olomouc: Česká společnost pro politické vědy. ISBN 978-80-902176-0-7.
27. KUBÁLEK, Michal (2006). Legitimita lokálních politických institucí. In: *III. Kongres českých politologů*. Eds.: Němec, J.; Šůstková, M. Praha, Olomouc: Česká společnost pro politické vědy. ISBN 978-80-902176-0-7.
28. OUTLÝ, Jan (2003). Volby do zastupitelstev – vývoj a souvislosti. *Politologická revue 2003/2*. ISSN 1211-0353.
29. RYŠAVÝ, Dan (2004). Proměny lokálních politických elit na venkově a malém městě – vstupní rozvaha. In *Česko-slovenské sociologické dny*. Ed.: Škodová, M. Praha: SOÚ AV ČR. ISBN 80-7330-068-0.
30. RYŠAVÝ, Dan (2006). Komunální je komunální a velká je velká! K hypotéze politizace lokálních politických elit. *Sociologický časopis 5/2006*. ISSN 0038-0288.
31. RYŠAVÝ, Dan (2009). Čeští lokální politici 20 let po tranzici. in Ladislav Cabada, Helena Hricová (eds.). *IV. Kongres českých politologů*, Plzeň, September 9–10, Plzeň: Západočeská univerzita v Plzni, s. 159–173.
32. ŠARADÍN, Pavel; OUTLÝ, Jan (Eds.) (2004). *Studie o volbách do zastupitelstev v obcích*. Olomouc: Univerzita Palackého v Olomouci. ISBN 80-244-0798-1.
33. VAJDOVÁ, Zdenka (1995). Postoje k lokální politice. *Data & Fakta č. 9*. Praha: Sociologický ústav AV ČR.
34. VAJDOVÁ, Zdenka (1996). Politická kultura – teoretický koncept a výzkum. *Sociologický časopis*, Vol. 32, 3/1996. ISSN 0038-0288.
35. VAJDOVÁ, Zdenka; KOSTELECKÝ, Tomáš (1997) Politická kultura lokálních společenství: případ tří měst. *Sociologický časopis*, Vol. 32, 3/1997. ISSN 0038-0288, s. 445-465.
36. VALEŠ, Lukáš (2007). *Zrod demokratických politických systémů okresů Klatovy, Domažlice a Tachov a jejich vývoj v 90. letech 20. století*. Plzeň: Aleš Čeněk. ISBN 978-80-7380-082-6.

INTEGRATION OF FOREIGNERS IN LOCAL COMMUNITIES

Jaroslav Cmejrek, Assistant Professor, Czech University of Life Sciences Prague, Kamýcká 129, 165 21 Prague, Czech Republic, cmejrek@pef.czu.cz
Jirina Rezanková, Graduant, Czech University of Life Sciences Prague, Kamýcká 129, 165 21 Prague, Czech Republic, jirina.rezankova@gmail.com
Jaroslav Cerny, Graduant, Czech University of Life Sciences Prague, Kamýcká 129, 165 21 Prague, Czech Republic, gt.cerny@seznam.cz

This paper was prepared with support of the Internal Grant Agency of the Faculty of Economics and Management CUA Prague - Project Local public administration communication with public in the Central Bohemia region (201111190068).

Abstract. The submitted study focuses on the approach to the issue of the integration of foreigners from third world countries outside the EU living in Central Bohemia. The project aims to clarify the conditions for the integration of foreigners from third world countries at the local level. The integration of foreigners is a long-term process taking place in resettlement areas and through work activities - namely in municipalities. Municipalities are also an important intermediary in providing feedback to the central authorities on its effectiveness. The situation and position of foreigners and the problems that arise during the integration process can be best identified by the lowest level of public administration – however, the alignment of these processes is the responsibility of central state administration. In terms of effectiveness of the integration process, the involvement of municipalities in the creation and implementation of integration policies is necessary. Municipal governments are increasingly faced with an ever faster growth in the number of foreigners in their territories, and the situation in some smaller towns and villages is close to critical. The emergence of closed communities of foreigners and the growing tensions between them and indigenous people can be considered the result of ineffective integration policies. The guideline for the selection of medium-sized cities was expected to facilitate the participation of the community of new citizens from third world countries into socio-economic events in the municipality. Some of the main indicators monitored in this study include the approach of the citizens of third-world countries to the job market (the possibility of entering into and asserting oneself on the job market) and the degree of active civic participation in local community. The paper is based on the results of two projects financed by the ESF and implemented by the Organization for Aid to Refugees, which took place from 2010 in the Central Bohemian region, and which is trying to put them in the context of European research MIPEX 2011 - Migrant Integration Policy Index (2007-2010). The sources of data for the investigative research are: statistics, information from the employment offices and the testimony of selected foreigners living in the CB region.
Keywords: foreigners, integration, municipalities, local community.

Introduction

The increasing number of foreigners not only poses a major challenge for the government and public authorities of the Czech Republic, but also for local governments of municipalities in which migrants seek to integrate into society. Starting in the 1990s, migration processes began to be fully developed in the Czech Republic – these processes had already been developing in Western European countries for several decades, and they now place the Czech Republic in the position of a so-called new immigration country. [Gabal, I. et al.: 1999] Many current issues relating to this position are present in many European countries. One of them is the question of the concept of full integration including conditions of entry and movement in the job market and the related issue of

the political participation of foreigners[2] from Third World countries permanently residing in the Czech Republic. This theme relates to the increasing number of these permanently-residing foreigners[3] and their increasing efforts to participate in public life through voluntary initiatives, open associations or business groups. The integration of foreigners is a two-way process which is not only dependent on the degree of accountability and degree of identification of foreigners with a new environment, but also the responsibility of the accepting society in the matter of cultural socialization, comprehensive help in the integration process (systemic measures), and tolerance and respect of the majority society. The main points observed in the submitted study include the approach of permanently residing foreigners from Third World countries to the job market (possibility of entry and assertion) and the degree of active civic participation in the local community.

From the 1990s, the Czech Republic has recorded ever increasing numbers of applications for asylum, which spread across all levels of life - education, labour, human rights, etc. Cohabitation can become stressful for minorities and majorities, especially if there are differences in lifestyle, culture and fundamental rights. Maria Hendriks talks about a so-called "fear of the unknown," which may cause problems in dialogue in initial contact with representatives of foreign cultures [Hendriks 1994:14]. These issues may also pertain to foreigners who desire to find a new home and are ready to fully assimilate to the new environment.

Research methods

The aim of the research was to look deeper into the integration of foreigners from Third World countries in the monitored areas – job market and political participation and analysis of situations to which these people are usually exposed, and it tries to show the likely sources and reasons for their occurrence and consequences that affect the ways and the process of integration in the host society: how they apply their qualification potential, how they adapt to the language, whether and how they fully respect the Czech legal system (or whether their experiences lead rather

---

[2] According to estimates from the Czech Statistical Office (30. 9. 2010) approximately 61 thousand Vietnamese live in the Czech Republic, 36 thousand of them having permanent residence, 5 thousand Mongolians, ca. 2 thousand of them having permanent residence, and 5 thousand Chinese, 3 thousand of them having permanent residence (but if we also take into account the estimates of illegal immigrants, then the estimates of immigrants monitored in our country could be as much as one third higher) [ČSÚ 2007].

[3] According to estimates from the Czech Statistical Office (30. 9. 2010) approximately 61 thousand Vietnamese live in the Czech Republic, 36 thousand of them having permanent residence, 5 thousand Mongolians, ca. 2 thousand of them having permanent residence, and 5 thousand Chinese, 3 thousand of them having permanent residence (but if we also take into account the estimates of illegal immigrants, then the estimates of immigrants monitored in our country could be as much as one third higher) [ČSÚ 2007].

to learning how to circumvent it and transgress valid norms). For the research process in this study, we choose the method of secondary data analysis from a quantitative survey and qualitative survey.

The secondary data analysis (quantitative survey) and qualitative survey related to statistics obtained from the projects of the Organization for Aid to Refugees implemented in the Central Bohemian Region in 10/09 - 06/11 were chosen as the research procedures. The addressed respondents are participants of two projects supported by the European Social Fund. (Apply Yourself!, Support of Men and Women in the Central Bohemian Region). Both projects focus on support of citizens of Third World countries legally residing in the Czech Republic with focus on their work assertion and activation in the local community. Both projects are implemented in the Central Bohemian Region. The total number of clients is 124. The quantitative survey questionnaire and subsequent statistical processing took place from 04/2010 to 06/2011. The questionnaire was designed to cover the most important aspects relating to the monitored indicators. Questions and answers in the questionnaire were structured and clearly written (within the pilot survey, a test was conducted in terms of the clarity of the given questions with a positive evaluation). The questionnaire was distributed in written form. Within the quantitative survey, all respondents filled-in a questionnaire focusing on the monitored indicators in the project - job market - entry, movement, access and participation in the local community (options, limits). The rate of return of questionnaires was approximately 97.13%. Four survey respondents did not participate for reasons of disinterest.

The statistical data analysis relates to the overall group of 124 respondents divided into nationality groups (Mongolia /15/, Vietnam /15/, China /15/, Russia /15/, Ukraine /15/, Belarus /9/, Kirgizstan /8/, African countries /11/, Moldova /5/, Romania /16/) living in the Czech Republic with permanent residence longer than five years. Men /74/; women/50/; the age range 18 – 56. The quantitative survey took place from 04/2010 – 06/2011.

The Central Bohemian Region was selected as the place for the implementation of the survey with focus on medium-sized cities from 11 thousand - 100 thousand inhabitants. The Central Bohemian Region is specific by its fragmentation of local public administration in the sense of different sizes of municipalities. The local government in the Central Bohemian Region is presented primarily as small municipalities and smaller towns, where according to established theories of communal democracy, citizen participation in political life is seen as a basic element. [Čmejrek, J.:2008]

The qualitative survey was based on elements of an established theory to which also related the follow-up analysis of the data according to Corbin and Strauss 1999. Furthermore, the research

focused on the views and experiences of representatives of nongovernmental and non-profit organizations in the integration of foreigners from Third World countries - 6 representatives of selected NNO (Organization for the Aid of Refugees/3/, Association for Integration and Migration/3/) promoting the interests of these target groups. All of the statistics and analyses are compared at the end of the study with the results of European MIPEX 2011[4] survey.

For the qualitative survey, we chose to use a data collection technique - semi-structured interview with open questions. The semi-structured interview with open questions served as a basic outline which respondents could continue to expand at their own discretion. Also related to the qualitative survey was the data triangulation requirement, i.e. that the research was continuously supplemented with an analysis of documents (bulletins, annual reports, web reports), professional literature, (Czech and foreign)[Denzin 1989 In. Hendl: 2005: 149], thereby also increasing theoretical sensitivity.

Conclusion

The research has shown the following results, which are divided into sections. They are divided into two main categories, based on whether the respondent was a foreigner from a third country or an expert from an NGO working with refugees.

Respondent – foreigners from Third World countries with permanent residence

(124 persons)

1. Employment of foreigners from Third World countries is generally considered a key factor of integration, as it is the basis of economic self-sufficiency in the recipient country. The research survey found that respondents are not able to acquire many legal jobs (61%). This area is currently conditioned by these objective facts. The economic crisis and its effects impacted the job market in 2010 to such an extent that the authorities of the Ministry of Labour and Social Affairs decided to reduce the announcing of vacant employment positions for foreigners from Third World countries and gave preferences to Czech citizens. This decision was supplemented by the state stopping the issuing of visas for employment.[5]

[4] MIPEX 2011 – Thomas Huddleston et al, Migrant Integration Policy index (2011), second publication MIPEX study, available at: http://www.mipex.eu/ British Council and Migration Policy Group.

[5] This decision also meant the threat of deportation from the country and existence of the uncertainty of foreigners from Third World countries with long term/transitional residence for the purpose of employment.

2. Other observed problems that were shown in the qualitative survey and which were also recorded in the analysis of the quantitative survey were the layoffs of foreigners as agency employees (mainly in larger companies in the Central Bohemian Region – meat plants, chocolate factories, auto parts factories, etc.); ever increasing control of foreign police; increasing reluctance to employ foreigners in employment contracts; not paying advances in health and social insurance, etc. This approach meant for the majority of respondents a fall into illegality (41%). Many have begun dealing with the problem of access to the job market through a transition to working on the basis of business licenses (31%), which did not exactly mean a happy outcome in some cases.

3. The question of housing, access to health care, a real fall to the very bottom of the subsistence minimum, risk to the education of children, seniors and the life of single mothers is closely related with the loss or absence of finding a new job (according to survey results). The social system is trying to capture these cases in relation to crime prevention. On the other hand, (according to statements of respondents), although the worker - foreigner contributes to social insurance, they are in some cases not entitled to social security. The main problems appear in the issue of payment of pensions, parental and unemployment benefits.

4. As for qualifying potential, most of the respondents fell in qualifying to the level of industrial workers. (51%) are university educated people, (91%) of whom, even after validation proceedings, are not involved in the field in which they studied. The reason is the reduction or complete inability to speak the Czech language as a means to find suitable employment. Some companies and government institutions insist on mastery of written and spoken Czech. Even the A1 language test (introduced in 2009) under the European Reference Framework is not enough for granting permanent residence. The lack of knowledge of the Czech language also means less opportunity to understand the Czech legal system, which (42%) of respondents do not know, and 21% do not understand it. According to (34%) of respondents, transcending the applicable standards is only due to ignorance or low availability of legal or social services.

5. In terms of participation in local communities, (18%) of respondents are formally involved in the activities of trade unions, initiatives and political groups (with the exception of voting and being elected to a municipal council). This mainly relates to the initiative to bring together different ethnic groups (e.g. Vietnamese Society, Friends of Mongolia, Ukrainian, Russian and Belarusian initiative, etc.) Overall, however, respondents are missing real information on this participation due to the unavailability of the information or lack of interest arising from fear of radically oriented groups or their pursuit of full assimilation and breaking ties with the community.

Views and experiences of representatives of nongovernmental and non-profit organizations in integrating foreigners from Third World countries (3 persons)

1. According to the testimony of NGO representatives, the problem in terms of work integration into the job market in the Central Bohemian Region is less controllable, perhaps even confusing. Most jobs are concentrated in a central location - Prague. In its fragmentation, the Central Bohemian Region is rather centralized in larger cities, and the manufacturing industry is what is mainly to be found here. According to respondents, it is typical for so-called "factories around the corner" to have a low level of social control that allows for the implementation of strategies that skirt and do not respect legal norms more easily than other types of localities. In particular, this is a strategy of employing workers through employment agencies. For employers, it is administratively easier to hire their workers through agencies who consistently calculate the higher potential administrative burden into the final price for the work unit. In recent years (according to respondents), employment agencies which focus primarily on hiring unskilled labourers began to lose their customers due to the amendment of the Employment Act, where agencies now have to increase the costs for their labourers and radically decrease the offer of payment for the work unit to employers. In general, the movement of staff across agencies in better guarded today than in past years, but there are still problems with the payment of wages and insurance for foreign workers.

Another aspect that respondents are monitoring are the increasing demands of employers (especially foreign companies) who are willing to employ foreigners from Third World countries in better positions but with greater requirements - qualified and specialized professionals must be able to manage language skills, especially in the following combination: native language, Czech, and one additional foreign language - usually English.

2. On the issue of political participation of immigrants from Third World Countries with permanent residence in the Czech Republic, pursuant to Act No. 491/2001 Coll., on Elections to Representative Bodies of Municipalities and on Amendments to Certain Other Laws - these foreigners cannot vote or be elected to local municipal councils. They can be elected only if they acquire Czech citizenship, but the path to achieve this is often arduous, and results are not always guaranteed. On the contrary, according to the respondents, public participation can be understood as a set task of the general protection of foreigners, where we can gradually put in the idea of indirect political participation, which gradually (within the principles of integration) attempts to approach mainstream society. Therefore, actual nongovernment non-profit organizations support in their ranks foreigners from Third World countries and try to defend their interests – e.g. through various

social events: Marches for rights of migrants, theatrical performances with the theme of refugees, the One World Film Festival, etc.).

3. Respondents also agreed on the issue of non-conceptual migration policy, which the Czech Republic has been unable to fully implement into valid legislation even twenty years after the revolution. This is mainly the Asylum Act, which tries in vain to absorb common European values. According to respondents, the asylum policy is very lengthy, non-transparent and hard on arriving foreigners. In many cases, asylum proceedings drag on for several years and condemn applicants to live in fear and anxiety. Another current problem is the EU criticized controversial method of phallometry in which officials determine whether the claim that the applicant is homosexually oriented is legitimate in order to grant asylum (this applies in particular in Nigeria and Iran, where people proven to be homosexual are harshly persecuted).

The aim of this research study was to look deeper into the integration of immigrants from Third World countries in the monitored areas – the job market and political participation in the monitored Central Bohemia Region using a sample of 124 respondents. In addition we looked into the principle of full integration, which includes the aforementioned participation in political activity. The research has shown lots of interesting information about the employment of foreigners from third countries as a key factor of integration and participation in local communities. According to the findings, it is important to focus on the legislative changes in the employment of foreigners and open a public debate about the possibility of political participation of foreigners from third countries in public life.

According to the research findings the concept of full integration plays a basic and important role for arriving citizens, i.e. the acceptance of all cultural, social and economic elements of the normal life of the majority society. The entire integration process is essentially controlled by the interference of state bodies that seek to systematically treat the arrival, movement and departure of foreigners from the country. The entire process is monitored independently by nongovernment non-profit organizations, which on a practical and conceptual level affect the integration system of foreigners in the Czech Republic (mainly incoming from Third World countries). Among the basic documents in which we find the basic embedding of the universal principles of integration are the Common Basic Principles for Immigrant Integration in Europe adopted by the European Commission in 2004. This document serves as the primary guide for creating integration policies of individual EU Member States. Unfortunately, the Czech legislation has not yet fully implemented

this document, what resulted in a number of problems and justified criticism from the EU, and furthermore it negatively affects the lives of migrants arriving from third countries.

Comparison of MIPEX study's findings

If we take a look at the results of the presented research in connection to the present study MIPEX[6] and consequently with the situation on the labour market, it is obvious that the main drawback is the lack of targeted support. Public authorities are rarely able to help migrants with specific needs, which particularly relates to productive migrants. Once migrants find work, they should have access to the same working conditions and trade union organizations as citizens. These workers contribute to social insurance but are excluded from part of the social security system. According to MIPEX, the Czech Republic is one of the new countries that dependent on people migrating for work. Often, however, we see that it neglects the specific problems of foreigners, which it marginalizes in terms of real numbers of migrants to the territory. An immigrant cannot fully participate in economic life until he is given a valid residency. In reality, this takes several years – the immigrants wait for the opportunity to acquire the same rights to work and education as citizens of the country. Even then, however, problems arise in terms of finding a job identical to the qualifications the emigrant had in his native country. Immigrants are told to assert themselves on their own without any general support. Those temporarily employed cannot achieve unemployment benefits or public employment counselling. Also, employers are not obligated to guarantee a worker the same working conditions and social security as his co-workers.

The situation in the Czech Republic concerning participation in politics is the second worst of all 31 countries in the MIPEX study. In 2001, the government failed to complete the arrangements that would ensure "reciprocal" voting rights for residents with permanent residence from countries outside the EU. This is caused by the absence of being able to vote and to be elected if a potential voter has long-term or permanent residence. Foreigners from Third World countries cannot in a given region contribute to political decisions that fundamentally affect their lives. Other limitations include the possibility of establishing a political association (if there are not at least two Czech citizens on the administration board), or become a member of a political party. Generally in Europe, most immigrants have little opportunity to contribute to policies that affect their lives and help them improve it. Positive examples of open access to immigrants include Greece, which with

[6] MIPEX 2011 – Thomas Huddleston et al, Migrant Integration Policy index (2011), second publication MIPEX study, available at: http://www.mipex.eu/ British Council and Migration Policy Group.

its reform of the citizenship law also significantly opened up political opportunities to immigrants living in the territory. In other countries, electoral laws are replaced by advisory bodies which propose their conceptual design and activities promote the rights of immigrants. In 2009, regional integration centres were established in the Czech Republic that substitute the activities of non-profit organizations, and whose aim is to provide services to foreigners, but the foreigners themselves are unable to use the financial support that would enable them to organize, meet their needs and represent the interests of their community. In conclusion, the goods news may be that the Czech Republic has undertaken in the next five years to address the voting rights of foreigners from Third World countries who have permanent residence and are fully integrating themselves in the Czech Republic, and to protect their interests.

References

1. Čepelka, Č., Jílek, D., Šturma, P. (1997): Asylum and Refugees in International Law. Masaryk University: Brno. ISBN 80-210-1493-8
2. Čmejrek, J. A kol. (2009): Participation of Citizens in Public Life in Czech Municipalities. Prague: Kernberg Publishing. ISBN 978-80-87168-10-3
3. Čmejrek, J. (2008): Municipalities and Regions as Political Environments. Prague: Alfa. ISBN 978-80-87197-00-4
4. ČSÚ (2007): Website of the Czech Statistical Office. [online]. [cit. 2011-06-23]. Available at: <http://www.czso.cz/csu/cizinci.nsf/kapitola/uvod>.
5. FROY, F. (2006): From Immigration to Integration: Comparing Local Practices. In: OECD From Immigration to Integration. Paris: OECD
6. Gabal, I. a kol. (1999): Ethnic Minorities in Central Europe – Ethnic Climate in the Czech Republic chapter. Prague: G plus G. ISBN 80-86-103-23-4
7. Hendl, J. (2005): Qualitative Survey: Basic Methods and Applications. 1st publication, Prague: Portal. ISBN 80-7367-040-2
8. Hendriks (1994): Social Work with Refugees. Prague: Kufr
9. KIC – Website of the Concept of the Integration of Foreigners and Situations in Individual Areas (2007). [online]. [cit. 2011-05-21]. Available at: <http://soze.cz/workinczech/file.php?id=5_1195225832_integrace>.
10. MIPEX 2011 – Thomas Huddleston et al, Migrant Integration Policy index (2011), second publication of MIPEX study, Available at: http://www.mipex.eu/ British Council a Migration Policy Group.
11. OSI EU (2002): Monitoring the Process of Entering into the EU: Protection of Minorities. 1st part. Open society Institute: USA ISBN: 1-891385-26-7
12. Rákoczyová, M. (2007): Mainstreaming Social Inclusion in the Czech Republic: challenge to the Czech public policy. Social policy forum, 2007, Vol.1, No. 2, Prague: VÚPSV
13. Strauss, A., Corbin, C. (1999): Basics of Qualitative Surveys. Procedures and technical methods of an established theory. Boskovice: Albert. (S-C)
14. Act No. 325/1999 Coll., On Asylum, as amended
15. Act No. 326/1999 Coll., on the Residence of Foreign Nationals in the Czech Republic
16. Act No. 491/2001 Coll., on Local Community Elections and on the amendment to some acts

MUNICIPALITY WEBSITES AS A COMMUNICATION CHANNEL IN THE CENTRAL BOHEMIA REGION

Jaroslav Cmejrek, Assistant Professor, Czech University of Life Sciences Prague, Kamýcká 129, 165 21 Prague, Czech Republic, cmejrek@pef.czu.cz
Martina Urbanova, Graduant, Czech University of Life Sciences Prague, Kamýcká 129, 165 21 Prague, Czech Republic, murbanova@pef.czu.cz

Abstract. E-government represents a relatively new but booming concept in the Czech Republic. The investigation of communication channels in public administration is very important in the case of the Czech Republic considering its disintegrated nature of settlements (the number of municipalities has increased by half since the Velvet Revolution in 1989). There are 6,249 municipalities in the Czech Republic, which is quite a high number for a country with ten **million** inhabitants. The research shows that the introduction of ICTs significantly enhances the access of citizens to information, not only in bigger cities but also in numerous rural communities. This is, however, namely the case of information relating directly to the activities of local administration bodies and to public services. As for information on competing political entities and their programmes, election campaigns, on civic associations and interest groups activities, we only find random and isolates pieces of information that cannot be used to make a coherent picture of the local political process. This paper focuses on municipality websites in the Central Bohemia Region that is characterized not only by the disintegrated nature of settlements but also by processes of suburbanization and metropolization.
Key words: Public administration, local government, websites, civic participation

Introduction

The aim of this paper is to present the municipality websites as a means of communication between regional governments and citizens. The paper is based on data gathered in the cities and non-city municipalities of the Central Bohemian Region. Differences in the size of municipalities and their development potentials, characteristic for the entire Czech Republic, are enlarged even more in the case of this region due to the closeness to the capital city and processes of suburbanization and metropolization. From the three levels of e-government - information, communication and transaction - we leave aside the transaction level, which is still a rather marginal issue. The paper thus focuses on information and communication services that are provided by the municipality websites. In the area of information services, these are primarily magisterial bulletin boards and the availability of documents, particularly those relating to development projects. In communications services, these are discussion forums within which citizens can express themselves with regard to the current problems of the development of municipalities. The paper further focuses on unofficial municipality websites and above-standard information or services provided by the municipal websites.

Information

In the Czech Republic, each municipality, as a local government unit, is legally obligated to keep magisterial bulletin boards. As of January 1, 2006, Act 500/2004 Coll. - Administrative Procedure came into effect, which imposes that access must be also granted to magisterial bulletin

boards by remote means (internet). The contents of physical and electronic magisterial bulletin boards must be consistent, and all documents which are to be disclosed by law must be posted both on the classical (physical) and on the internet bulletin board.

Although the obligation to keep electronic magisterial bulletin boards has been in effect for several years, the fulfilment of this obligation has been delayed in many municipalities of Central Bohemia. Today, however, we seldom encounter in the Central Bohemia region municipality websites in which there is no magisterial electronic bulletin board. However, another question we must ask is what sort of form a magisterial electronic bulletin board has. The archives reveal many aspects of magisterial electronic records, which vary widely in scale. From the archives of magisterial electronic bulletin board, it can also be easily traced in which year an electronic bulletin board was in fact launched. For example, the town of Rakovník, home to about 15 thousand inhabitants, has on its bulletin board documents only as old as 2008, and it should be noted that there are a number of documents missing from the board for 2008 (budget, minutes of council meetings and other important documents that were certainly publicized on the physical bulletin board). For 2009, the electronic bulletin board does not even have any documents (Rakovník, 2011). On the contrary, a good example is the town of Jesenice (2,000 inhabitants), which on its website publishes documents from 2001 (Jesenice, 2011), or Nové Strašecí (5,000 inhabitants), whose board is very well structured and "filled" with documents (Nové Strašecí, 2011).

The nature of the documents that municipalities publish on their boards tends to be various. It depends on the decision of the municipality if it leaves the board for purely official business, such as announcements, minutes from council meetings, etc., or uses the boards as a space for publication of additional information that might serve the citizens. On the boards of major cities are available rather purely official documents, and often in small villages we find on the boards everything that the village wants to tell its citizens because it is the easiest communication channel for managing a municipality. The municipality of Kounov (500 inhabitants) placed on its board things such as timetables and information about holidays of the general practitioner (Kounov, 2011). It’s hard to imagine that information of a similar nature would be published by a district town - in small communities, however, such information is useful and publishing them on the site of the municipality suggests that the site is "alive".

It is desirable when publishing a large number of documents on the bulletin board to classify them into specific categories. Some municipalities even offer on their boards a search feature according to words or a specific date. Surprisingly, this can also be found in some small rural communities such as Ratměřice (200 inhabitants), whose website was appraised during the

Golden Crest Competition. Otherwise, however, the rule applies that the more people the municipality has the more formal the electronic bulletin board is (Ratměřice, 2011).

Another important aspect of information services is the availability of documents and information about development projects. If a municipality has some development documents prepared, it would be desirable to allow the citizens of the municipality to become acquainted with them. These include, for example, the municipality development strategy or territorial plan. Likewise, it is desirable that the municipality publishes on its website information on development projects. A municipality project presented online certainly has a better chance of being noticed by businessmen, and of its possible support by such businessmen.

Municipalities in the Central Bohemian Region most often publicize their territorial plans. This is particularly important because of new construction, which necessitates frequent changes to the territorial plan. If we compare the availability of development documents in the municipalities of Rakovník, we can conclude that only one-fourth of municipalities have available on their websites a development document - most often a territorial plan. These documents are often poorly located within the electronic bulletin board. Other municipalities have chosen a more appropriate way through a direct link in the main menu which bears either the direct name of a specific document, or it is simply called "important documents" or "documents". A good example of this is the Senomaty township (1,000 inhabitants), on whose website the strategic documents are easily and clearly available (Senomaty, 2011). The territorial plan and development strategy are found under the link "Development of the Township". In this section, people can read about the development projects and grants. The low number of municipalities that publish strategic documents on their websites undoubtedly relates to the fact that many municipalities, especially smaller ones, do not have such documents prepared.

Communication (discussion forums)

Whilst the information level of e-government is a unidirectional flow of information, the communication level assumes a two-way flow of information - a dialog mode. Here, the basic tool is the e-registry. Its operations include the duties required by law for municipalities, but there are still municipalities on whose websites the e-registry has not yet been activated or does not work as it should. In small municipalities, the e-registry sends inquiries to the municipal authority. The disadvantage of this method of communication is that the inquiries sent to the municipal authority, or the responses to it, are not available to other residents of the municipality.

A far more advanced form of a dialogue between citizens and regional governments are discussion forums or open guest books. However, if a municipality decides to establish a discussion forum on its website, it generally means that there will be greater demands on the operation of the website. Therefore, only a small portion of Central Bohemian municipalities operate forums on their websites - usually these are larger cities. Of the 26 municipalities with extended powers located in the Central Bohemian Region, only three municipalities run a full discussion forum on their websites, and another four municipalities display on their websites only selected questions and answers. A very sophisticated forum can be found on the Český Brod website (Český Brod, 2011). Queries are sorted into several sections, and each section into several topics, with the largest number of topics found in the "Questions for Representatives" section. The dating of queries shows that the forum is very much used by the citizens. An easier option in terms of site management is public disclosure of questions together with the answers of responsible competent persons. The city of Příbram has this service on its website (Příbram, 2011). Individual queries are sorted by the regions to which they relate, and according to the time when the query was entered. It also applies in this case that citizens have great interest in asking questions.

The websites of small rural communities mostly do not have question and answer sections available, and discussion forum are not very common either. Rare exceptions include the municipality of Branov, which, with its less than 200 inhabitants, is one of the smallest municipalities of the Rakovník district, and yet allows citizens to discuss on its website local affairs (Branov, 2011). In addition to Branov, of the 82 municipalities of the Rakovník district, only citizens of the district have this option (however, discussion forums are offered by some unofficial community websites - see below).

A far more widespread form of asserting the views of citizens in local public affairs are polls. Polls can be found quite commonly on municipality websites, regardless of the size of municipality. For representatives of municipalities, this is quite an easy way for them to learn about the views of citizens. The weakness of polls is their lack of representativeness, as virtually anyone who visits the municipality's website has the ability to vote. On the other hand, through interestingly worded questions, polls can contribute to the activation of public life in the municipality, attract people to attend cultural events or alert citizens and others persons of news. Many municipalities have recognized this and regularly offer new polls on their websites. Other municipalities do not use polls or offer only one poll regarding the appearance of the site ("how do you like our new website?").

Unofficial municipality websites

On the internet, one can encounter websites which at first glance look like the pages of a municipality, but are in fact operated by someone else. These unofficial municipality websites often have a very similar address to the official municipality website. Such sites are often established by the citizens of the municipality through municipal clubs and associations, or by local entrepreneurs. Such sites are used for various purposes. If something is missing for citizens of municipalities on the official website, it usually can be found on the unofficial websites. Examples include the already aforementioned discussions forums. On its official website, the Lubná municipality (950 inhabitants) does not offer the possibility of any discussions. However, according to its founders, the unofficial municipality website (Lubná, 2011) is conceived as a "portal that brings the ideas and commentary of the citizens of Lubná on topics that concern us."

It is typical for unofficial municipality websites that they are created by municipality associations to provide citizens with detailed information on the activities of the association. This website is then linked to the official website, and in essence, it can be said that it complements it. This can be characterized, for example by the Kozojedy municipality (Kozojedy, 2011) in which a cultural association acts and whose website informs its citizens in detail about cultural events in the municipality and surrounding area (Cultural Association Kozojedy, 2011). Both websites are connected to each other through links. Another example is the city of Slaný. The unofficial websites of the city are focused on tourism, culture and leisure activities [18], and there is also a discussion forum available which is not on the official Slaný website (Slaný, 2011). Even in this case, both websites are connected to each other through links.

Another unofficial type of website presents something of a "contra-web" or "opposition website" that has been established by citizens who want to express dissatisfaction with the local government’s activities and events in the municipality. The authors of these websites usually have their own political ambitions. The unofficial website of the municipality of Rynholec was established by the Rynholec Association (civic association) (Rynholec Association, 2010). These websites mainly address the issues related to the environment and ecology. In the discussion forum, the citizens of Rynholec quite critically reflect on the specific steps of the municipality management. This site also serves as a space for publicizing the electoral program of the associations of independent candidates.

Above-standard information or services

If a municipality website is well cared for, many municipalities must also address the question of what would be required to make the site even better. Many municipalities publish on their websites above-standard information or allow their citizens to utilize services that are not common in other municipalities. However, it is not easy to identify specific groups of users - they can be, for example, Prague commuters, countrymen, potential investors, tourists or youth homes, medical facilities, interest groups, local football club, etc.

When considering which innovations would improve the municipality's website, municipalities should look primarily to the needs of their citizens, and also to what other services resulting from the activities of the authority would make sense for the municipality. From the perspective of the authority, it appears useful to arrange a visit to the authority office via the internet. Residents of the town of Černošice have this service available on the municipality website, and the municipality succeeded with this in the Golden Crest competition as the best online service (Černošice, 2011).

Another interactive service can be found on the website of Vestec u Prahy (Vestec, 2011). This service is called MMS defects, and it is a service where citizens send an MMS message to the municipality with suggestions that relate to any messes within the community. Messes captured by a mobile telephone are then shown on the website along with the date when the place was cleaned up and how it looks now.

Citizens of Chrášťany (Rakovník district) have above-standard information available to them. The municipality has gradually been publicising a chronicle on its website (Chrášťany, 2011). The reactions of citizens to the online chronicle are positive, as well as to the virtual tour of the municipality.

It is ideal when the citizens themselves come up with the ideas on how to improve the site. The leadership of municipalities should clarify and discuss with citizens what the page should serve for based on the local conditions. The site should indeed help the citizens, but it can also aid the authority as well. A situation where the site is swamped with useless information or improperly set services should, however, be avoided. What is important for one person may be useless to others, so one person should not make the decision about the information on the site without consulting others. Few communities publish a fairly important piece of information on their websites – the coefficient for calculating property taxes.

Conclusion

1. Use of modern information technologies in communication between regional autonomies and citizens in the Czech Republic has two distinctive characteristics. Above all, it is the accelerating of the entire process; whilst around the year 2000, municipal websites were still rather exclusive affairs, during a single decade, the number of websites increased significantly, as well as the volume of information and services they mediate. As research of the municipalities of the Central Bohemian Region showed, today, the use of this communication channel in public administration is becoming commonplace, and it is something on which citizens and local government bodies increasingly rely. However, research also shows that despite the rapid development of electronic communication, profound differences remain between individual municipalities. This is the result of residential structure and suburbanization, but it is also evident here, however, that the creation of an information society cannot be a one-way process and much depends on the specific local conditions and initiative from below. This is especially important in smaller towns and rural communities, as they lack the strong organizational structures and apparatuses of large cities.
2. The second characteristic feature is the tendency to standardize the use of the internet in public administration at the local level. Shortly after 2000, the creation of municipal websites was to a certain extent a spontaneous process. Legislative steps relating to obligatory publication of data, e-registries and electronic bulletin boards, etc., contributed to certain standardization in this area. Research into the municipalities of the Central Bohemian Region also showed that despite the above mentioned standardization tendencies there remains considerable space for initiative and the use of specific conditions. Compared with earlier studies, which, however, did not focus exclusively on Central Bohemian municipalities, it seems that a certain inhibition is occurring in the use of discussion forums and other forms of dialogue. If this tendency is confirmed, the explanation will probably be found partly in the growing technical demands, and also within the competition of rapidly expanding social networking sites on the internet.

References

1. Branov 2011. Website of the Municipality Branov [online]. [cit. 2011-06-23]. Available at: <http://www.branov.cz/>.
2. Cultural Association Kozojedy 2011. Website of the Cultural Association Kozojedy [online] [cit. 2011-06-23]. Available at: <http://kozojedy.eu/>.
3. Černošice 2011. Website of the Town Černošice [online]. [cit. 2011-06-23]. Available at: <http://www.mestocernosice.cz/>.
4. Český Brod 2011. Website of the Town Města Český Brod [online]. [cit. 2011-06-23]. Available at: <http://www.cesbrod.cz/>.

5. Chrášťany 2011. Website of the Municipality Chrášťany [online]. [cit. 2011-06-23]. Available at: <http://www.chrastanyurakovnika.cz/>.
6. Jesenice 2011. Website of the Town Jesenice [online]. [cit. 2011-06-23]. Available at: <http://www.jesenice-ra.cz/>.
7. Kounov 2011. Website of the Municipality Kounov [online]. [cit. 2011-06-23]. Available at: <http://www.obec-kounov.cz/>.
8. Kozojedy 2011. Website of the Municipality Kozojedy [online]. [cit. 2011-06-23]. Available at: <http://www.obeckozojedy.eu/>.
9. Nové Strašecí 2011. Website of the Town Nové Strašecí [online].[cit. 2011-06-23]. Available at: <http://www.novestraseci.cz/>.
10. Příbram 2011. Website of the Town Města Příbram [online]. [cit. 2011-06-23]. Available at: <http://www.pribram-city.cz/.>
11. Rakovník 2011. Website of the Town Rakovník [online]. [cit. 2011-06-23]. Available at: <http://www.mesto-rakovnik.cz/>.
12. Ratměřice 2011. Website of the Municipality Ratměřice [online]. [cit. 2011-06-23]. Available at: <http://www.ratmerice.cz
13. Rynholec 2011. Website of the Municipality Rynholec [online]. [cit. 2011-06-23]. Available at: <http://www.obecrynholec.cz/>.
14. Rynholec Association 2010. Website of the Rynholec Association (civic association) [online] [cit. 2011-06-23]. Available at: <http://www.rynholec.cz/index.html>.
15. Senomaty 2011. Website of the Township Senomaty [online]. [cit. 2011-06-23]. Available at: <http://www.senomaty.cz/>.
16. Slaný 2011. Website of the Town Slaný [online]. [cit. 2011-06-23]. Available at: <http://www.meuslany.cz/cs/>.
17. Unofficial Website of the Municipality Lubná [online]. [cit. 2011-06-23]. Available at: <http://www.lubna.eu/>.
18. Unofficial Website of the Town Slaný [online]. [cit. 2011-06-23]. Available at: < http://www.slansko.cz/>.
19. Vestec 2011. Website of the Municipality Vestec [online]. [cit. 2011-06-23]. Available at: <http://www.vestec.cz/>.

REPRESENTATION OF INTERESTS OF LITHUANIA'S SUB-NATIONAL ACTORS AT EUROPEAN UNION LEVEL

Vaida Lescauskaite, Vytautas Magnus University, S.Daukanto 28, Kaunas;
Vaida.Lescauskaite@fc.vdu.lt
Liudas Mažylis, Vytautas Magnus University, S.Daukanto 28, Kaunas;
l.mazylis@pmdf.vdu.lt; +37037223090

Abstract. Analytical models based on multilevel governance approach are tested as applied for interest representation processes of Lithuanian municipalities at European Union institutions. Lithuania is a specific object of research as a new European Union member state possessing limited resources, being rather centralized, and without any deep institutional expertise and traditions of local interest representation. Research methods such as in-depth interview with experts followed by analysis of documents are used. Different patterns of representation are tested. It has been shown that institutional frameworks and accession channels are to be assumed kinds of explanatory factors taken into consideration when analysing aforementioned processes. Limited resources of the municipalities, lack of initiative, and common positions hardly formulated are main problematic features depicting existing situation. Ways of resource optimization are further discussed.
Key-words: municipalities, Lithuania, European Union, interest representation.

Introduction

Lobbying activities of sub-national actors of new European Union Member States are rather new and not analyzed enough, when, at the same time, this type of interest representation is deeply enrooted in a core Europe. There was an attempt to analyze this kind of representation in Lithuania (Vijeikis, 2007) but without any empirical analysis. At this particular moment lobbying activities of sub-national institutions in the EU is increasing; Lithuania is represented in a number of organizations related to EU decision making. This shift subsequently leads to the new scientific challenges: how does sub-national representation appear? Is it effective, and to what extent? Is there a real need of this kind of representation in a small unitary country such as Lithuania?

Research methods

In the analysis, mainly qualitative research methods were used. Comparative testing of models followed by analysis of literature sources as well as interviews of experts has been used. Concretely, semi-structured interviews combining questions prepared with non-structured questionnaires of factual and opinion-based questions. Positions of seven politicians and representatives of associations are covered by the interviews and written correspondence (April-May, 2011): EP Member Algirdas Saudargas (EPP), representative of Lithuania in the Committee of Regions Andrius Kupcinskas, former (2007-2010) Brussels representative of the Association of Local Authorities in Lithuania, person presenting position of Permanent Representation of Lithuania in the EU, and representatives of the Seimas of Lithuania.

Aim

The aim of this paper is to examine the features of Lithuania's subnational actors' lobbying activities in the institutions of the EU while applying the theory of multi-level governance.

RESULTS AND DISCUSSION

Multi-level governance

Two contrasting models of multi-level governance are detected by L. Hooghe and G. Marks: Type I and Type II multi-level governance. Type I is characterized by general purpose jurisdictions. Decision-making powers are dispersed across different levels, but the institutions have wide discretionary powers. Jurisdictions are defined by non-intersecting, territorial memberships. This model is based on system-wide, durable architecture, which is created by systemic institutional choice. Inner communities form in these types of jurisdictions and create common identities among the citizens. (Marks, Hooghe. 2004).

Type II multi level governance is defined by jurisdictions which are not divided into clear levels, but instead operate at many territorial scales. They are task-specific and flexible. Membership within these jurisdictions is intersecting. They are not conductive towards building a common identity, therefore citizens' links with the jurisdictions are easily made and broken. (Marks, Hooghe. 2004).

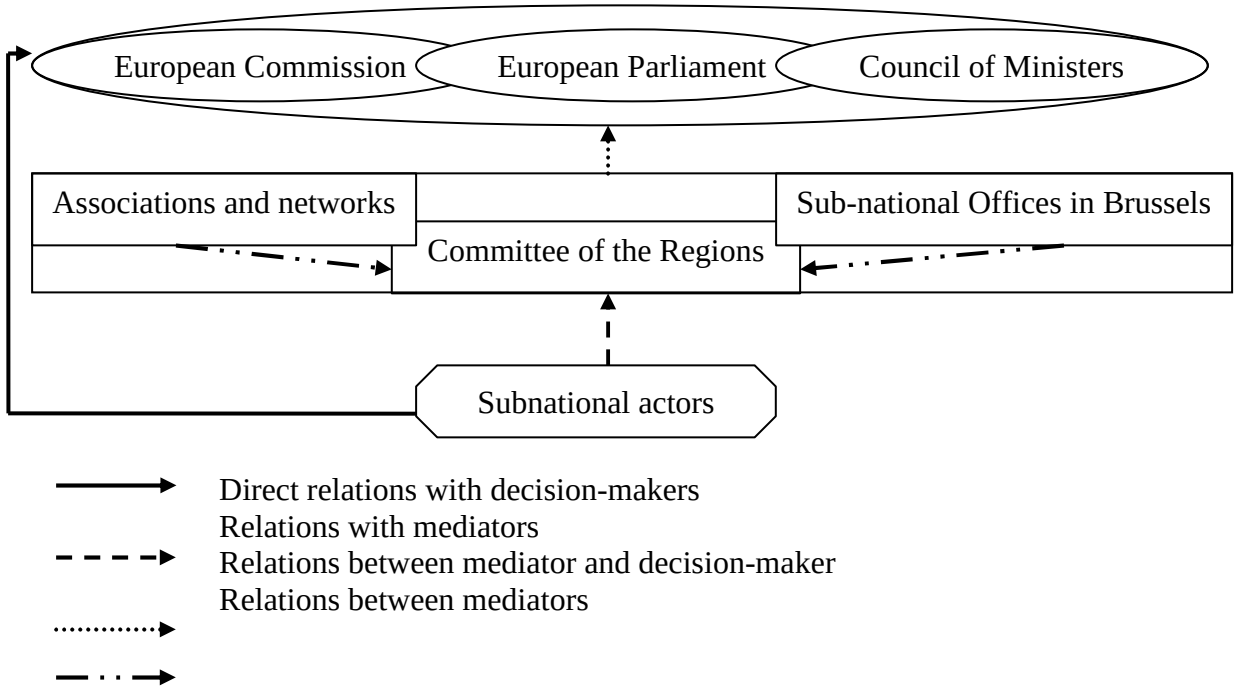
These models are pertinent to analyzing the actions of sub-national actors while trying to influence the institutions of the EU, because they directly correspond with the strategies chosen by the actors. The systematic order and stability of Type I multi-level governance explain such actions as trying to influence the decisions of the EU indirectly – by influencing the state position on the relevant topic. This model also can be used to analyze direct lobbying relations with the decision-making institutions of the EU – the Commission, Parliament and Council. This strategy bypasses one of the institutional levels, but the system remains stable and orderly. Type II multi-level governance explains lobbying through various international organizations, associations and networks – these structures are created by sub-national units, which are unified not by territorial factors or common identity, but by functional elements – common interests, similar economy, etc.

Access channels

When depicting the channels that sub-national actors may employ to gain access to the institutions of the EU, the common approach is to group them into the institutions of the EU themselves, and other channels, like sub-national offices or international organizations (Tatham,

2008). The Committee of the Regions (COR) is usually attributed to the institutions, because of its official position among the institutions of the EU and its slowly growing powers. Nevertheless, it must be emphasized, that COR does not have decision-making powers, and although hearing its opinion is usually a requisite step in the legislative proceedings, those opinions are not legally binding. Because of that, COR should rather be attributed to the mediators that facilitate the lobbying process, alongside international associations and networks and sub-national offices in Brussels (scheme 1).

Therefore, sub-national actors, while lobbying the EU, can access the decision-making process by employing three wide strategies – influence the state position, directly approach the decision-making institutions, or refer to mediators and representatives.



Scheme 1. Access points of sub-national actors to the decision making of the European Union (Lescauskaitė, 2011)

The biggest chances of success, of course, are when these all strategies are combined. However, this would demand a great deal of resources. If the sub-national actor does not command a lot of human, financial and other resources, one strategy, chosen according to the resources commanded, the connections of the representatives and the nature of the interests represented, is employed.

The case of Lithuania

Among the many challenges arising form Lithuania's EU membership is the need for professional and effective lobbying (Andrikiene, 2002). One of the problems that both Lithuania as a state and its municipalities face is the lack of professionals that would be able to successfully lobby the EU, would have the needed connections.

The municipalities of Lithuania are represented in the EU through three main channels. In 2001 the Association of Local Authorities in Lithuania joined one of the largest and most influential European associations – the Council of European Municipalities and regions (CEMR). In 2004 Lithuania's delegation to the Committee of the Regions was formed, and finally, in 2007 Brussels Representation of the Association of Local Authorities in Lithuania was established.

The influence of organizations such as CEMR is widely disputable. On the one hand, it is said that their mere existence shows the mobilisation and dynamism of sub-national actors, their growing power. On the other hand, the real scope of the influence these organizations have is considered to be quite small (Tatham, 2008). Our research, however, shows that these organizations are one of the main channels of influence for the municipalities of Lithuania. It also reveals that such organizations have a considerable influence within the EU and lobbying through them is one of the main ways lobbying is done in Brussels. The importance of being part of CEMR was stressed in interviews – it was said that institutions of the EU, especially the Commission, would often take CEMR's opinions into account. Also, these organizations are especially important to smaller and weaker actors, such as Lithuania's municipalities. By cooperating with sub-national actors from other states, these municipalities can draw attention to their interests and problems, that otherwise would be overlooked in the lobbying arena of Brussels.

The possibilities of The Committee of the Regions having an influence on the decisions of the EU are considered to be quite numerous. M. Neshkova states that COR influences about a third of Commission's decisions (Neshkova, 2010). Other authors see it as a useful tool when the situation is favourable – for example, when the Commission is searching for allies and COR agrees with it's opinion (Tatham, 2008). However, our research shows a much smaller scope of powers that COR possesses. The former representative of Lithuanian municipalities in Brussels stated that the members of the European Parliament do not take COR's opinions into account, the member of the European Parliament stressed the procedural aspect of hearing the opinions and grouped COR with all the other lobbying organizations. Even the member of Lithuania's delegation to COR,

when talking about the possibilities of influence, stressed the importance of political culture and courtesy that the decision-makers possess but not the powers of COR itself.

Our research has also revealed how big an influence the party partitions have. In COR, single regions, without the support of a party, cannot gain any influence. When delegations to the COR meet, their members, coming from different states and regions can better communicate with each other at the party level, with the help of the shared ideology. Party system is also essential to the workings of the European Parliament. However, this party system doesn't give any more power to the small actors, and the chances of the municipalities of Lithuania to influence the decisions remain quite small.

The sub-national offices in Brussels do not have a formal status and their influence is hard to measure. It is said that most of them do not aspire for real power to influence the decisions of the EU (Marks, Haesly, Mbaye, 2002). The Brussels Representation of the Association of Local Authorities in Lithuania fits within such context. Its main function is collecting and conveying information about the EU and the symbolical representation of Lithuania's local government, rather then the "hard" lobbying and trying to influence EU's decisions.

It must be said, that the municipalities of Lithuania, being quite small, not at all powerful and having only one representative in Brussels, remain quite inconspicuous. The problems that hinder the representation of their interests rise form their small territory, meagre financial and human resources and, more importantly, form their inability to identify common interests, speak with one voice. Also a problem is a lack of interest from the municipalities themselves – only a third of them maintain constant communication with representative in Brussels.

Not only separate municipalities exhibit the failure to communicate with the representative in Brussels – this problem is also evident within the Association of Local Authorities itself. The insufficient organization of the Association causes such problems as failing to convey information to the representative because it isn't included in the official duties. Formulating a common position as early as possible, being able to clearly state it and defend it are essential factors of successful lobbying in the EU, and the inability of Lithuanian municipalities to do that greatly diminishes their chances of effectively representing their interests.

Also it is worth to mention that the whole staff of the Brussels Representation of the Association of Local Authorities in Lithuania consists of only one representative. This limits the possibilities to gather all needed information and determines the necessity of collaborating with sub-national representatives from other states (the Lithuanian representative most closely collaborates with representatives from Latvia, Estonia and Finland). This informal international

collaboration is especially important to small sub-national actors that cannot boast great resources – it enables them to cover much greater amounts of information, to share the work and thus make it more effective.

Gatekeeping role of central government

When discussing multi-level governance, the role the state plays is usually counted as one of the greatest problems hindering the efforts of supranational and sub-national actors' communication and collaboration and their influence upon one another's decisions. The state can take up a role of a gatekeeper and thus prevent the sub-national actors from gaining any access to the supranational level (Bache, 1999). M. Pollack states, that the readiness and potential of the state to play a role of the gatekeeper depend on the existing division of powers between the national and sub-national levels (Pollack, 1995).

Surprisingly, our research has shown that the municipalities of Lithuania do not face this problem and that the central government of Lithuania stands out in this context. The central government not only refuses from its gatekeeping role, but also declares its openness to the sub-national actors and their interests. Information received from the Seimas committees on European Affairs and on State Administration and Local Authorities shows that the representatives of local authorities are invited to participate in the committee sessions, discussions, are consulted when a question, pertinent to their interests, arises. The former representative of the Association of the Local Authorities was a little more critical when asked about the collaboration with the state level, but his critique stated that the central level is not well aware of the problems municipalities face. Nothing in the results of our research indicated that the state level would block or deliberately hinder the representation of the municipalities in the EU.

It cannot be said that the municipalities of Lithuania are strong and powerful and maintain a power advantage in their relations with the central government – as M. Pollack's proposition about the existing division of power would imply (Pollack 1995). Therefore, the openness of the state government of Lithuania and it's refusal to play the role of gatekeeper are more likely the products of the state's late accession to the EU. Because of that, the central government of Lithuania did not experience the gradually deepening integration and erosion of its powers, which prompted other governments to defend their dominating position.

Conclusions

1. Two existing models of multi-level governance were applied for the analysis of sub-national representation at supranational level. Applying Type I model enables to explain activities of sub-national institutions such as strive to influence EU level decisions through influencing national position. Direct lobbying in the appropriate EU institutions, when national level is excluded (work through Committee of Regions, or representation of national association of municipalities in Brussels), relates to this model, too. Type II model allows to explain lobbying of sub-national actors through different international organizations and networks created between sub-national units; here not a territory or identity but functional factors such as common interests or similar institutional position are playing the main role.
2. Lithuanian municipalities are seeking representation at EU level through three main channels. First, participation in the activities of the CEMR, Council of European Municipalities and Regions. It gives for Lithuanian municipalities broader access to the information about EU decisions, helps to share lobbying activities common in Brussels. However, real influence in this organization is possible only through co-operation with sub-national actors of other countries. Delegation in the Committee of Regions seems lacking special influence: it is limited by scarce resources and insufficient co-ordination. Party mechanisms are to be seen as hindering factors both in the Committee of Regions and European Parliament. These findings are to be further discussed in inter-connection with Type I model of multi-level governance. At the same time, analysis within context of Type II model shows that representation of the Association of Lithuanian Municipalities at the EU institutions is limited. Main task of it is usually collecting information rather than influencing decision-making processes. Problems are arising from maladministration in inter-relations between Association and its representation as well as apathy of municipalities in European affairs.
3. Statement about strive of national level actors to limit access of sub-national actors to the decision making is rejected by our analysis. Central level declares its support for sub-national actors unambiguously appreciating their input.

References

1. Andrikiene L, Siuolaikines lobistines veiklos tendencijos, Vilnius, 2002
2. Bache I, The extended gatekeeper: central government and the implementation of EC regional policy in the UK, *Journal of European Public Policy*, Nr. 61, 1999
3. Bache I, Flinders M, *Multi-Level Governance*, Oxford, 2004

4. Hooghe L, Marks G, *Multi-Level Gocernance and European Integration*, Lanham, 2001
5. Lescauskaite V, *Subnacionaliniu veikeju lobizmas ES institucijose: Lietuvos atvejis europiniame kontekste*, Master thesis, Kaunas, 2011.
6. Marks G, Haesly R, Mbaye H, What Do Subnational Office Think They Are Doing In Brussels?, *Regional And Federal Studies*, Vol. 12, Nr. 3, 2002
7. Neshkova M.I, The impact of subnational interests on supranational regulation, *Journal of European public policy*, Nr. 17-8, 2010
8. Pollack M, Regional actors in an intergovernmental play: the making and implementation of EC structural policy', Rhodes C, Mazey S, *The State ofthe European Union, Vol. 3, Building a European Polity?*, 1995
9. Tatham M, Going Solo: Direct Regional Representation In The European Union, *Regional And Federal Studies*, Vol. 18, Nr. 5, 2008
10. Vijeikis D. *Subnacionalinio lygmens interesu atstovavimas Europos Sajungoje*, Doctoral thesis, Vilnius, 2007

STRATEGIC MANAGEMENT OF TRADE UNIONS: NECESSITY AND POTENTIAL

Antra Line, Mag.sc.soc.,
Riga Teacher Training and Educational Management Academy, Imantas 7.linija -1, Riga, Latvia, LV-1083
E-mail: antra_line@inbox.lv
Phone number: +37129466120

Abstract. This article presents a review and analysis of the theoretical framework for the strategic management of trade unions as specific non-governmental organizations. The aim of the study is to theoretically justify the need for strategic management of trade unions and to empirically clarify strengths and weaknesses of Latvian trade unions, as well as the formulation of their mission and goals. The paper theoretically describes the stages of strategic management process; it finds out the role of the strategic direction; it offers the analysis of trade union goals. To provide a successful strategy formulation process, methods to analyse internal and external environmental factors of trade unions have been proposed, and the nature of their strategy implementation and evaluation has been described. The author has empirically established Latvian trade union leaders' views on the strengths and weaknesses of unions' internal environment, opportunities and possible threats in the external environment, as well as the formulation of the unions' missions and goals. Methods of data acquisition and processing: a survey in the form of a structured interview and the SWOT analysis method. It has been concluded that the strategic management of trade unions is necessary because it would ensure that they would be able to adapt to the changes in the external environment.
Key words: Trade unions, strategic management, vision, mission.

Introduction

Non-governmental organizations, and also trade unions, have a significant role in ensuring and maintaining democracy in any European Union Member State. Analysing the development tendencies of trade unions and their positions in Europe, it can be concluded that in different countries they are determined by a complex and specific historical, cultural and economic situation. Changes in the trade union work in Latvia are related with Latvia accessing the European Union, which determined the need to increase social standards in the country. Statistical data approve that after Latvia's accession to the EU and opening of labour markets of several EU Member States, the number of trade union members in Latvia has decreased. Since 2006 the number of trade union members has decreased by 10.3%; in addition, the attitude to joining trade unions has become more sceptical (Darba apstākļi un riski Latvijā 2009-2010, 2010). Changes in society, globalisation, recession, increase of the unemployment level, economic emigration and the number of union members are a serious challenge for any trade union because it requires the analysis of the present situation, planning of further activities and the ability to work more intensively and flexibly. The goal of the research is to justify theoretically the need for the strategic management of trade unions and to empirically clarify the strengths and weaknesses of Latvian trade unions, as well as the formulation of their missions and goals.

Research methods: monographic, analysis, synthesis methods.

Data acquisition and processing methods:

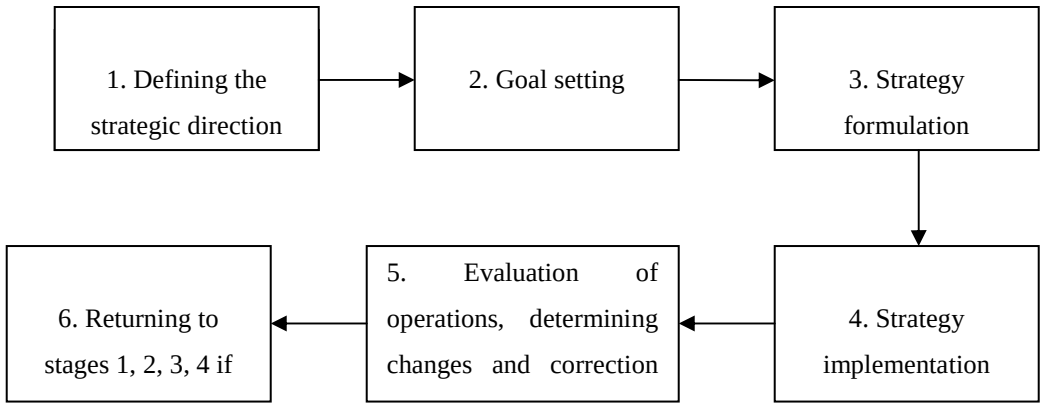
- Surveying of Latvian trade union leaders with the help of structured interviews. 18 trade union leaders from the member organisations of the Free Trade Union Confederation of Latvia (FTUCL), as well as managers of present fields and professional trade unions outside the FTUCL. The survey was carried out in June 2010.
- SWOT analysis method.

Results and discussion

Trade union researcher T. Hannigan defines the trade union strategy as a policy, programmes and projects that provide directions of operation for trade unions, taking into account their goals (Hannigan, 1998). In management literature various strategy definitions are present. A. Chandler considers that "the strategy is defining long-term goals of the organization, defining tasks and an effective use of the resources necessary to attain the goals" (Kalve, 2005).

According to the author of the present paper, this definition could also be related to a trade union strategy. The analysis of scientific literature indicates that to date no comprehensive research about strategic management of trade unions has been performed. Regarding trade union management, literature sources offer the researchers' opinion about the fact that lately several trade unions have begun to integrate strategic planning approaches and techniques in their work but this practice is not very popular. In 2003 the theoreticians P. Clark and L. Grey clarified that since 1990 the number of international trade unions that implement strategic planning has increased. Trade unions in the USA, Great Britain and Australia have realised that strategic planning helps to adapt to the changing external environment (Weil, 2005). Some trade union researchers, e.g. T. Hannigan, P. Clarck and D. Weil have analysed strategic planning processes and state that evaluation of the strategic direction is necessary to increase the effectiveness of trade unions. D. Weil mentions three stages of strategic planning: strategy formulation, implementation and evaluation (Weil, 1994).

Strategic management has developed from strategic planning. Strategic planning deals with the development and implementation of plans, but strategic management concentrates on management and the ability to think strategically (Caune, Dzedonis, 2009). The author of the paper considers that trade unions should pay attention to the development of strategic thinking and, for ensuring an effective strategic management process, she recommends to use the strategic management stages presented in Figure 1.



Source: Томпсон, Стрикленд, 2008

Fig.1. Stages of strategic management of trade unions

Defining the strategic direction. An opinion exists that the strategic direction can be determined by defining the mission and vision. There is no absolutely correct approach what the mission statement should be, but there are several recommendations of theoreticians about what aspects should be included in the mission statements. The essence of the mission of an organisation can be understood or explained in a broader or narrower way. In the broad sense of the notion, it is the purpose of the existence of the organization, its philosophy. In the narrow sense it reflects how the organization operates, what its goals are. The mission statement of the organization is a precisely defined justification of the existence of the organization, which in most cases is formulated abstractly and generally, specific activities are not defined but the overall motivation and direction of the organization are defined (Caune, Dzedonis, 2009). The way how trade unions define their missions significantly affects their success. The main task of the mission statement is to identify itself with the goals and problems of trade unions, to differentiate trade unions from other organizations, to be referred to all the external stakeholders of trade unions, to be attainable and measurable, exciting, inspiring and challenging. Analysing the insufficiencies of mission statements in non-governmental organizations, P. Drucker has stated that the mission of trade unions should be practical; otherwise it will just be a list of good will that does not indicate a particular direction. One of the major mistakes in formulating mission statements is to turn the mission statement into a declaration of good deeds. The mission has to be simple and transparent; it has to be clear for the trade union

staff, volunteer staff and any trade union member (Друкер, 2007). The Free Trade Union Confederation of Latvia has not formulated its mission yet and only some of the industry trade unions of Latvia internet homepages contain the mission statement (LBAS interneta mājaslapa). The author of the paper has clarified through the survey that in 16 organizations out of 18 trade unions of Latvia the mission is formulated. Respondents named the following mission statements: "Defence of the members' professional and socio-economic interests", " To represent, defend the members' labour, economic, trade and other social legal rights and interests", " Together we can achieve more!", "To achieve an adequate salary, work conditions and social guarantees for the members". It can be observed that the mission statements of Latvian trade unions do not correspond to the recommended theoretical viewpoints. Not all the mission statements respond to the questions: "Why does the trade union exist? What does it deal with? What is its uniqueness?" The author of the paper indicates that at present trade union leaders should pay a special attention to the inspiring and challenging aspect of the mission statement.

Vision is a common understanding about the organization's character and goals; it determines general limits within which the organization should operate. It comprises what the organisation should be, not what it does. Effective trade unions use the strategic vision to better understand and operate in a dynamic and complicated environment. Although state laws and statutes of trade unions provide the character and goals of these organizations, it is exactly the vision that inspires the members and implements legal definitions in real life. Only some organizations can have that unifying, inspiring and lasting strategic vision as trade unions may, if only it is formulated appropriately. M. Allison and J. Kay emphasise the need for internal and external vision in non-governmental organisations. The internal vision is concentrated on what the organisation will be like in the near future but the external vision – on how the external environment will be improved if the organisation attains its goals (Allison, Kay, 2005). Based on this approach, the external vision of trade unions should reflect the desirable positive changes in legislation, the social and the economic environment. The author of the paper considers that formulation and publicising of the external vision offers trade unions the opportunity to impact the former sceptical attitude of society towards trade unions and encourages thinking about trade unions as representatives of the interests of society.

Goal setting. It can be certainly asserted that modern organizations cannot be imagined without goals. Trade unions need them to implement the mission of the organization, it is exactly the goals that turn the mission into special, specific measurable results, as well as ensures understanding about the direction of the operation of the organization, and the goals coincide with the vision and

the mission. Development of the mission, vision and goals cannot happen only in the offices of trade union leaders or at the board meetings; trade unions should develop teams to involve knowledgeable and active trade union members in this process.

During the interviews the Latvian trade union leaders mentioned the following goals:

- long-term goals: to increase the number of trade union members twice; to enhance the development of new work places, work safety, growth of professional skills and remuneration; to enhance employee solidarity at all levels of trade union operations; to become an influential power in society.
- short-term goals: to develop legal, democratic and cultural society; to involve new members and to establish new trade union organizations; to sign collective labour agreements in all enterprises; to facilitate the work and long-term development of industry trade unions; to facilitate employee safety and health at the work places; to increase the number of trade union members, to educate the members; to participate in the development of laws and regulations that would improve or maintain the current guarantees of employee rights.

Theoreticians set several demands for the goals: the goals should be specific and measurable, the responsibilities and execution terms should be clearly stated; the goals should be attainable, ambitious, but realistic; the goals should be flexible – it is possible that due to the changes in the organizational environment a need to adjust or change them will arise (Caune, Dzedonis, 2009). The goals named by the Latvian trade union leaders exhibit significant weaknesses; the execution terms are not mentioned, the goals are unspecific, general and declarative.

Strategy formulation. There is a basis to consider strategy formulation as one of the most significant stages of the strategic management process. Sometimes trade unions, like other non-governmental organizations, use SWOT and PEST analysis methods taken over from business (Strategic planning toolkit). The name of PEST method consists of the initials of the words in English: P – Policy; E – Economy; S – Society; T – Technology. With the help of this method the external environment of trade unions can be studied: political and legal environment; economic environment; economic environment; social/cultural environment; technological environment. PEST method does not have a strict form – trade unions have to decide what factors to study (Forands, 2005). The PEST analysis method is criticised for its subjectivity, but it is widely used. The author of the paper considers that the PEST analysis method is appropriate at both the state and the industry trade union level. SWOT analysis is also rather subjective; however, at the same time it is a method tested in business practice and its application allows the trade union to evaluate both the internal and the

external environment. Based on the information obtained in the interviews, the author of the paper has performed the SWOT analysis of Latvian trade unions.

Table 1. SWOT analysis of Latvian trade unions

Strengths	**Weaknesses**
S1. Large number of members	W1. Small number of members
S2. Competences and motivation of industry trade union leaders	W2. Competences and motivation of industry trade union leaders
S3. Competences and motivation of the enterprise level leaders	W3. Competences and motivation of the enterprise level leaders
S4. Ability to work and sign qualitative collective labour agreements	W4. Inability to work and sign qualitative collective labour agreements
S5. Ability to offer qualitative support for trade union members at the enterprise level	W5. Inability to offer qualitative support for trade union members at the enterprise level
S6. Ability to develop and sign qualitative master agreements	W6. Inability to develop and sign qualitative master agreements
S7. Ability of industry trade unions to offer qualitative services to local level trade unions	W7. Inability of industry trade unions to offer qualitative services to local level trade unions
	W8. Inability to prevent external threats
	W9. Insufficient financial resources of trade unions
	W10. Decrease of the number of members
Opportunities	**Threats**
O1. High unemployment level	T1. High unemployment level
O2. Recession	T2. Recession
O3. Need for trade union services	T3. Negative employers' attitude in enterprises
O4. Appearance of new technologies	T4. Negative attitude of employers' organizations to trade unions
O5. Positive employers' attitude in enterprises	T5. Denying attitude of the majority of society to trade unions
O6. Positive attitude of employers' organizations to trade unions	T7. Negative attitude of the government to trade unions
	T8. Economic emigration of the population
	T9. Legislation norms delaying and hindering work

Source: author's designed

Results of the survey indicated to the fact that trade union leaders are only partly notice the strengths and weaknesses, as well as opportunities of the external environment of these organisations, but they are better aware of the impact of threats on the work of trade unions.

During the strategy formulation, trade unions should find answers to several questions: “How to prevent the reduction of the number of members?”, “How to reduce the negative attitude of employers and society to trade unions?”, “How to improve the ability to develop and sign qualitative collective labour agreements?”. It is important to ensure a creative approach in this process – the faster the changes in the external environment of the organization, the more creativity is necessary.

Strategy implementation. For the formulated strategy to be skilfully implemented the following should be provided:

- Determination of the required duties, responsibilities and the decision making authority;
- Development and implementation of strategy maintaining policy and procedures, incl. the development of the results control system;
- Allocation of financial, human and material resources of the organization according to the strategy;
- Development of informative, communicative, operational and electronic systems;
- Introduction of such organizational culture that would facilitate strategy implementation;
- Maintaining such leadership that would facilitate strategy implementation
- (Caune, Dzedonis, 2009; Томпсон, Стрикленд, 2008).

Evaluation of operations, determining changes and correction of operations. To access the operation correctly and to forecast introduction of the potential changes in the organization, strategy correspondence analysis to the requirements of the internal and external environment of trade unions, opportunities and goal attainment should be performed (Dāvidsone, 2009). The potential correction of operations can be related with developing new opportunities, structure, organizational culture, type of organization’s operations or other changes. At this stage decisions about the necessity to return to some of the previous strategic management stages are made.

Conclusions

1. Strategic management of trade unions is necessary because it helps to develop strategic thinking and to adjust to the changes created by the external environment.
2. Defining and publicising external vision offers trade unions the opportunity to affect the former sceptical attitude of society to these organisations and encourages thinking about trade unions as representatives of the interests of society.

3. Latvian trade union leaders only partly notice the strengths and weaknesses, as well as opportunities of trade unions, but they are better aware of the impact of threats on the work of trade unions.
4. Defining of the mission and goals of Latvian trade unions has not been paid sufficient attention to. Mission statements do not correspond to the desirable theoretical viewpoints, mission statements do not contain information about execution terms, the goals are unspecific, general and declarative.

References

1. Caune, J., Dzedons, A.(2009) Stratēģiskā vadīšana. Rīga: Lidojošā zivs, 27-58 lpp.
2. Darba apstākļi un riski Latvijā 2009-2010. (2010). Rīga: Latvijas Darba devēju konfederācija, 88 lpp.
3. Dāvidsone, G. (2008) Organizāciju efektivitātes modelis. Rīga: SIA O.D.A., 30 lpp.
4. Forands, I. (2005) Biznesa vadības tehnoloģijas. Rīga: Latvijas izglītības fonds, 174 lpp.
5. Kalve, I. (2005) Apseglot pārmaiņu vējus. Rīga: Turība 142 lpp.
6. Друкер, П. (2007) Менеджмент в некомерческой организации. Москва; Санкт-Петербург; Киев : Вильямс, 23 с.
7. Томпсон-мл., А.А., Стрикленд III, А.Дж. (2008) Стратегический менеджмент: концепции и ситуации для анализа. Москва; Санкт-Петербург; Киев: Вильямс, 34-68 с.
8. Allison, M. ,Kaye J. (2005) Strategic planning for nonprofit organizations: a practical guide and workbook. USA: John Wiley&Sons, p.87-105
9. Hannigan, T. (1998) Managing tomorrow's high - performance unions. London: Quorum Books, p. 201-210
10. Strategic planning toolkit.(2006) Office of State and Local Affiliates. Washington: AFL-CIO, p. 40-42
11. Weil, D.A. Strategic Choice Framework for Union Decision Making. The Journal of Labor and Society .Volume 8 March 2005 p. 327–334
12. Weil, D. A. (1994) Strategic Planning for Labor Unions. New York: Lexington Books, p.10
13. LBAS interneta mājaslapa. [skatīts 20.05.2011.]. Pieejams: www.lbas.lv

INTEREST REPRESENTATION AT THE EUROPEAN UNION LEVEL: THE CASE OF LITHUANIAN ENVIRONMENTAL INTEREST GROUPS

Liucija Mazylyte, University College London, lmazylyte@yahoo.com, 37037223090
Romualdas Povilaitis, Lithuanian Agriculture University, povilaitis46@yahoo.com

Abstract. An increased number of competences transferred from the national to the European level and a high number of the European Union regulations and directives allow expected changes in traditional patterns of interest representation. Since the 1990s, one can observe increased attempts by business as well as public interest groups to influence decisions at the supranational level. However, not all the interest groups are willing to *europeanize,* e.g. transfer their activities from the national to the European level. Factors such as organizational arrangements, resources, goals as well as national institutional context may determine their activities' changes. This article examines the case of Lithuanian environmental interest groups and their level of Europeanization. Considering the comparatively short EU membership and rather weak tradition of interest representation, the analysis of environmental interest group activities shows to what extent the EU factor shapes and transforms activities and strategies of non-profit interests. The research combines qualitative data from the interviews with the stakeholders as well as quantitative data of interest groups' organizational resources.
Key words: European Union, interest groups, Lithuania, representation, environment

Introduction

Since the1990s, a tendency of increasing interest representation of various groups at the European Union level can be seen. Despite the fact that business groups are the most active actors trying to lobby the EU institutions during the various stages of the decision-making process (Greenwood, 2003), there is a general growth of *public interest* representation. On the one hand, the EU institutions are becoming more open. On the other hand, taken into account the fact that the EU regulations affect many spheres of citizens' lives, the growth of *public interest* groups, such as environmental NGOs' or consumer rights advocates', is a possible outcome. More generally, interest groups use various channels of influence as well as different timing to influence the decision outcomes at the EU level. They differ in their goals, connections, reputation, and material resources used in order to influence the decisions. According to S. Hix, only a few European – level environmental associations are "insiders", e.g. hold formal representational structures at the EU institutions (Hix, 2005). Nevertheless, environmental groups attempt to influence the policy outcomes and use well developed strategies.

One can also look at the interest groups' representation from the domestic perspective. Transferring activities from the national arena to "Brussels" is a processes defined as Europeanization of interest groups. Even though Europeanization is a highly contested concept, one can agree it not only defines processes at the European institutions' level but also takes into account domestic changes caused by EU membership. However, not all interest groups are motivated to Europeanize. The case of Lithuanian environmental groups and their level of Europeanization is

therefore an important research area due to various reasons. Firstly, it would help to outline to what extent Lithuanian environmental interest groups (and what type of groups) are willing to be represented at the European level. Secondly, it presents the patterns of strategies they use in order to have an impact on the decisions. Finally, it allows analyze more general impact of Europeanization on interest group's activities at the national level. In this research, we apply models presented by scholars such as H. Kluever, J. Beyers and B. Kerremans to the Lithuanian case and check to what extent domestic institutional context, interest group's representation at the national level and critical resources restrict activities' Europeanization. In-depth structured interviews with the stakeholders of the most active Lithuanian environmental NGOs are used together with the quantitative data from their websites and reports.

1. Theoretical Background: "European" vs "National" Routes of Interest Representation

In the traditional way, interest groups' goals are to have an effect on the policy outcomes at the national level. Interest groups unite various smaller associations that share common goals and tend to conduct lobbying activities in the executive or legislative bodies. As already mentioned before, the growth of the EU regulations not only on the market relations created a new arena where the interest groups can switch their attention and lobbying resources. However, the very concept of Europeanization (in our case – Europeanization of interest groups) is contested. We find a wider definition by M. Vink most plausible, where the Europeanization is treated as "(…) a domestic change caused by European Integration" (Vink 2003).

National interest groups vary in their goals, resources and to what extent they are willing to choose the "Brussels route" to achieve certain policy outcomes. It would be too superficial to claim that material resources are the only reason why certain groups, e.g. large business companies, are better represented at the EU level. Scholars emphasize various reasons why interest groups switch or do not switch their activities to the EU level. H. Kluever presents her model of interest representation while combining two approaches: resource mobilization and rational choice institutionalism, where the former emphasizes the role of material resources and the latter looks at the way institutional context shapes and restricts groups' activities. While distinguishing between interest groups that declare a need to transfer their attention and strategies to the EU institutions and those who remain active at the national level, she claims that the material resources the group posses is not the only determining factor. H. Kluever's main argument refers to the "embeddedness" of an interest group in the national institutional context, namely the degree of representativeness at the state's level including contacts with the officials, dependence on the national funds and

involvement into the decision-making process (Kluever 2010). To some extent similar approach is offered by J. Beyers' and B. Kerremans' that neglect the most influential role of the material resources (Beyers, Kerremans 2007). According to those scholars, the factors implementing Europeanization is interest group's immediate environment, critical resource dependency and policy domain. If a group is well represented at the national level, dependent on government funds and raises issues important in that particular national context, its level of Europeanization is rather low (Beyers, Kerremans 2007). One can also agree it is the *issues* interest groups raise and their declared goals determine representation at the national or supranational level. Since environmental groups raise global issues, one can expect them to be more willing to Europeanize and achieve European-level policy outcomes.

2. Lithuanian Environmental Interest Groups and Europeanization: Research Design

Lithuania is a new Member State accessed the EU in 2004 together with seven other Central-Eastern European countries. Furthermore, it is a post-communist country, re-gained Independence in 1990, and has a rather short tradition of interest representation and intermediation. One has to keep it in mind while applying foreign models to the case of Lithuania.

However, models used by foreign scholars to test Europeanization of interest groups in Western countries can be applied to the case of Lithuanian environmental groups and their activities at the national and supranational levels. Following the assumptions of H. Kluever, J. Beyers and B. Kerremans, we test to what extent the embeddedness of an interest group and its resource dependency restricts its Europeanization. We assume that the more interest group is involved into decision-making process at the national level, the less willing it is to Europeanize. Secondly, we assume that critical resource dependency on the domestic funding restricts the Europeanization as well. By the same token, we look at the strategies environmental groups use in order to influence the decisions at both levels.

While using the method of in-depth interviews with 5 most active groups, we tended to find out to what extent Lithuanian environmental interest groups consider themselves represented at the national level, e.g. embedded in the Lithuanian institutional context. Furthermore, we asked representatives of the groups to outline their strategies used to influence the decisions at the national level, contacts with the officials, funding etc. A second part of interviews was related to the EU factor: groups' declared importance of the EU decisions on its activities, contacts with the EU institutions, or monitoring of the EU directives. Analysis of the groups' websites and reports allowed us to analyze their resource dependency, funding venues, membership and activities.

3. Results and Discussion: Level of Europeanization and Institutionalization

We divide our results into the following passages on membership in the European associations, contacts with the EU officials and participation in the meetings, critical resource dependency and embeddedness into the domestic institutional context.

Membership in the European Associations

Most of the environmental NGOs are members of the European environmental associations. The majority of stakeholders interviewed point out that a Lithuanian "voice" can be better heard while represented through bigger and more influential associations that already have a reputation in the European institutions and use well developed lobbying strategies. For instance, Lithuanian Wind Power Association declares an active membership and considers itself well represented through the European Wind Energy Association. Groups declare active membership in transnational associations that allows them not only be represented at the European level but also gain important information and learn sophisticated lobbying strategies. Even though it is difficult to measure the actual input of Lithuanian environmental NGOs into the activities of the European level associations, their motivation to participate indicates willingness to Europeanize.

Stakeholders also express a need of associations that unite NGOs from "new" Member States from Central and Eastern Europe in order to "counterweigh" "old" ones and their position. A difference between Member States in terms of environmental issues was expressed by a representative of Lithuanian Environmental NGOs Coalition: the "new" Member States are still behind Western standards and face different challenges while complying with all the requirements of environmental policies' implementation. Their voice in front of the European Commission or European Parliament needs to be strengthened through Central-Eastern European associations (Respondent from "Atgaja", 2011). However, Active participation in the decision-making process at the EU level should be considered, as well as changes in the domestic activities.

Contacts with the European institutions, participation in the meetings

Some groups declare they tend to contact the EU officials (Lithuanian Wind Power Association or "Atgaja"). Their "targets" are Directorate General Environment, Directorate General Climate as well as members of the European Parliament, mostly representatives of "Green" parties. Those contacts are rather new and not institutionalized yet, however, their very existence shows important attempts of communication with the EU institutions. It is evident from the interviews that

Lithuanian environmental interest groups posses high levels of information on European environmental issues, directives and other regulations. On the other hand, they also express a more skeptical view towards general representation of interest groups at the European level. According to them, DG Environment invites various groups from different Member States into "round table" discussions, however, there is no guarantee their opinion and position will be taken into account in the decision-making process (Respondent from the Environmental Centre for Administration and Technology, 2011). This remark outlines a good understanding of the problems of interest representation at the EU level: there is no guarantee that an environmental group's position will be reflected in the decisions, they are only invited into the consultation procedures. Similar patterns exist at the national level, however, the domestic interest groups have more access to monitoring activities. On the other hand, as we can see from the interviews, Lithuanian environmental interest groups do visit European institutions and participate in the discussions, allocate material resources for those activities, if they assume a broader benefit will be achieved. Analyzing their trends of behavior, one can treat them as rational players counting costs and benefits of the attempts to influence the decisions at the supranational level.

Willingness to Europeanize: critical resource dependency and embeddedness into the national context

Our initial assumption that an interest group is less willing to Europeanize when it is dependent on the national governmental funding, is not supported by empirical evidence. Even though scholars use the factor of government funding in their analyses of Western cases, this factor does not exist in Lithuania. None of the analyzed NGOs are dependent on governmental funding: their revenues consist of membership fees and resources of project funding (mostly EU-funded projects). The dependence on the EU funding is related to interest groups' Europeanization from two sides. Firstly, once the group is supported by the EU funds, its activities are restricted and their goal remains to ensure fulfillment of the EU requirements on funding. On the other hand, the groups tend to influence decisions on environmental policies, thus they seek to be heard at the institutions' level and use material resources from their projects. This dependency, to some extent, may restrict the group's willingness to Europeanize. It is not the lack of resources but the type of NGOs funding that has an impact on their activities at the supranational level.

Another aspect is the *history* of Lithuanian environmental NGOs. While some of them, for instance "Atgaja" was created in the late 1980s, quite a few were established by the initiative of the EU before the accession. Even though the organizational structure, goals and membership might

have changed, the existing ties with the European Commission remain. One can agree, this factor may reinforce more active interest representation at the European level and involvement into the decision-making process.

The other assumption that the group's embeddedness into the domestic context restricts its Europeanization can be partly supported in the case of Lithuanian environmental interest groups. Their proclaimed involvement into the decision-making process, especially after the establishment of Lithuanian Environmental NGOs Coalition (Coalition) five years ago, shows their actual embeddedness into domestic institutional context. All interviewed environmental groups claim the governmental institutions welcome their position on various policies, discuss issues. Nevertheless, the groups tend to use the factor of the EU membership and a need of compliance with the EU directives in their negotiations with the national government. Furthermore, it reflects a more general tendency of greater *institutionalization* of environmental interest groups in Lithuania. It does not mean that they don't vary in their goals and activities Firstly, they show organizational capacities in presenting their unite position through Coalition. Secondly, it encourages a higher level of cooperation, sharing information and learning. Those processes are parallel to the process of Europeanization. It opens a wider perspective for future research, where the impact of interest groups' institutionalization and Europeanization on the consolidation of democracy can be tested.

Conclusions

1. Lithuanian environmental interest groups are increasingly affected by the processes of Europeanization. Even though they do not transfer their activities from the national level to the European one directly, they do evaluate contacts with the European institutions' officials, are members of European environmental associations and monitor decision-making processes.
2. A double-sided relationship with the European institutions is evident, though to some extent. A number of environmental organizations are directly dependent on the European funding, some of them were originally created by European Commission. They critically assess European environmental policies, monitor new European-level decisions and, were applicable, use "the EU factor" in their domestic lobbying activities.
3. Process parallel to the Europeanization of the activities is an *institutionalization* of the relations with the domestic governmental institutions. The two processes are related to each other and outline an active presence of environmental NGOs and their rational decisions. Their willingness to Europeanize seems to be an outcome of cost-benefit

analysis rather then determined by the level of information or material resources. The activities and attempts to influence environmental policies are more related to the national level today, however, the degree of attention paid to the European-level processes is increasing.

Appendix

In-depth interviews with the representatives of the following NGOs: Environmental Centre for Administration and Technology, "Atgaja", "Lithuanian Wind Power Association", "Baltic Environmental Forum", "Lithuanian Environmental NGOs Coalition".

References

1. Beyers, J.; Kerremans, B. Critical resource dependencies and the Europeanization of domestic interest groups, in: *Journal of European Public Policy* 14: 3 April 2007, p. 460-481
2. Greenwood, J. *Interest Representation in the European Union*, Basingstoke: Palgrave Macmillan 2003, 19-21
3. Hix, S. *The Political System of the European Union*, Basingstoke: Palgrave Macmillan 2005. p. 219
4. Kluever, H. Europeanization of Lobbying Activities: When National Interest Groups Spill Over to the European Level, in: *European Integration*, Vol. 32, No. 2, March 2010, p. 175-191
5. Vink, M. What is Europeanization? And Other Questions on a New Research Agenda, in: *European Political Science*, Autumn 2003, 3.1, p. 63

VALDĪBAS PUBLISKO ATTIECĪBU LOMA VALSTS PĀRVALDES OPTIMIZĀCIJAS NODROŠINĀŠANĀ

ROLE OF GOVERNMENT PUBLIC AFFAIRS IN OPTIMISATION OF PUBLIC ADMINISTRATION

Līga Mirlina, mg. sc. soc., Biznesa augstskola Turība, Graudu iela 68, Rīga LV–1058, Latvija, liga.mirlina@inbox.lv, 29257087

Abstract. With the decrease of administrative influences the effective function of contemporary public administration needs the support and partnership of society. The necessity to consider the reaction of society and mass media oblige public administrators to inform and to create public understanding on decisions made by public administration, especially unpopular ones, as well as to ensure the opportunity for individuals to get involved in the decision making process. In other words, the regulation of the state needs increasingly more public acceptance and approval both responding to public needs and wishes and creating common values and standards that in one way or other can be achieved by the mass communication process. Thus the role of communication and public relations in public administration performance increases.

Analysing the formation principles of communication and its place in public administration, the aim of this research is to follow the development tendencies in public administration communication that are directed to the formation of public understanding of public administration activities.

In order to understand the role of public affairs in public administration processes, the author has studied the tendencies of public administration, non-governmental organisations and media relations transformation during several state reform development stages in Latvia.
Key words: public administration, communication, decision making, public affairs

Ievads

Demokrātiskas valsts pārvaldes galvenais darbības mērķis ir kalpot savas valsts iedzīvotājiem, veicinot valsts izaugsmi un iedzīvotāju labklājību atbilstoši demokrātiskā ceļā pie varas nonākuša politiskā spēka izvirzītajai programmai. Pie tam efektīvai valsts pārvaldes darbībai mūsdienās līdz ar administratīvo ietekmju samazināšanos ir svarīgs sabiedrības atbalsts un līdzdalība. Lai nodrošinātu valsts attīstību atbilstoši iedzīvotāju vajadzībām un gaidām, ir nepieciešama sabiedrības līdzdalība valsts pārvaldes lēmumu pieņemšanā, veidojot dialogu un viedokļa apmaiņu, sniedzot informāciju par topošajiem un pieņemtajiem lēmumiem, veicinot informācijas pieejamību un caurspīdīgumu.

Raksta centrā ir publisko attiecību lomas pieaugums valsts pārvaldes darbībā, komunikācijas instrumentus izmantojot gan proaktīvi, gan interaktīvi, reaģējot uz sabiedrības nostāju, gaidām un vēlmēm, kas tādā vai citā veidā izpaužas caur medijiem un nevalstiskajām organizācijām (NVO). Valdības publiskās attiecības ir ne tikai valsts pārvaldes instruments tiešai iedzīvotāju reakcijai, t.i., sabiedrības uzvedības veidošanai atbilstoši kādam normatīvajam aktam, bet arī veicina stratēģisku valsts pārvaldes mērķu sasniegšanu, proti, valdības un dažādu sabiedrības grupu viedokļu optimizāciju. Pētījuma mērķis ir analizēt valdības publisko attiecību attīstības

tendences, kas vērstas uz sabiedrības izpratnes un atbalsta gūšanu, novērtējot publisko attiecību lomu un funkcijas, kā arī mehānismus, ar kuru palīdzību sabiedrība regulē sociālo homeostāzi un katrā konkrētā gadījumā īsteno vajadzīgās sociālās izmaiņas. Darbā tiek iezīmētas arī valdības, NVO un sabiedrības attiecību transformācijas tendences Latvijā.

Kā **pētījuma metodes** ir izmantotas šādas: monogrāfiskā metode ar nolūku noteikt valsts pārvaldes darbības principus, kā arī valdības publisko attiecību vietu un lomu valsts pārvaldē; normatīvo dokumentu un valsts pārvaldes institūciju dokumentu analīze ar nolūku izpētīt Latvijas valdības publisko attiecību un komunikācijas mērķus un metodes, kā arī sabiedrības līdzdalības iespējas Latvijas valsts pārvaldē un NVO iesaistīšanās līmeni; statistikas analīze un salīdzinošā analīze ar nolūku noteikt valdības publisko attiecību rezultātus, novērtēt valdības publisko attiecību lomu valsts pārvaldes optimizācijā, kā arī salīdzināt teorētiskās nostādnes ar sociālajiem un politiskajiem procesiem Latvijā, kuros izpaužas valdības publiskās attiecības. Tādējādi darbā ir iecerēts pamatot valdības publisko attiecību sociālo funkciju kā valsts pārvaldes un sabiedrības viedokļa optimizāciju.

Labas pārvaldības principi un publiskās attiecības

Demokrātiskās sabiedrības pastāvēšanai un valsts labklājības attīstībai nozīmīgas ir četru galveno sabiedrības elementu – indivīda, pilsoniskās sabiedrības, privātā sektora un valsts – savstarpējā mijiedarbība. Pie tam daudzi pētnieki uzsver, ka postindustriāla sabiedrība, veidojoties kā sociālās labklājības valsts, daudzkāršoja tādas attiecības un apstākļus, kurus nevarēja adekvāti regulēt, izmantojot tīri publisko vai tīri privāto tiesību institūtus. Tie prasīja, lai tiktu ieviestas tā sauktās sociālās likumdošanas normas. Citiem vārdiem sakot, valsts regulēšanai aizvien vairāk bija nepieciešams sociāls akcepts un piekrišana, kuru sabiedrība tagad var nodrošināt, veidojot kopējas vērtības un normas, kas vairs nav iespējams ārpus masu komunikācijas procesa (Habermas, 1989). Savukārt valsts pārvaldes galvenais uzdevums ir viens no grūtākajiem, jo tai jāspēj nodrošināt taisnīgu un efektīvu sabiedrības pārvaldīšanu. Tādejādi sabiedrības vajadzībām atbilstošu valsts pārvaldes lēmumu gatavošana un pieņemšana nav iespējama bez valdības dialoga ar sabiedrību, jo tikai komunikācijas procesā tiek paustas un apzinātas sabiedrības gaidas un vēlmes, tiek saskaņotas dažādu sabiedrības grupu vajadzības un intereses, kā arī tiek meklēts sabiedrības atbalsts topošiem un pieņemtiem lēmumiem. Līdz ar to demokrātiskā sabiedrībā attiecību komplekss: valdība, valsts pārvalde, NVO, sabiedrība – pamatā ir balstīts uz mijiedarbību, t.i., divvirzienu komunikācijas modeli.

Mijiedarbība starp valsts pārvaldi un sabiedrību, kas izpaužas kā publiskās, racionāli kritiskās debates, kuru mērķis ir brīvi, uz sabiedrības kopīgo interešu pamata sasniegt racionālu vienošanos starp publiski konkurējošiem viedokļiem (Habermas, 1989), nodrošina sabiedrības interešu saskaņošanu un veicina sabiedrības vajadzībām atbilstošākā un optimālākā valsts pārvaldes lēmuma pieņemšanu. Pie tam valsts pārvaldes uzdevums lēmumu pieņemšanā ir nodrošināt maksimālu iesaistīto pušu interešu pārstāvniecību tā, lai pieņemtais lēmums atbilstu sabiedrības vajadzībām un gaidām. Tas sasniedzams tieši publisko attiecību procesā, saskaņojot sabiedrības intereses un iespējas un nonākot pie konsensa starp iesaistītajām pusēm, lai gan vienlaikus jāatzīmē, ka sabiedrības iesaistīšana bieži vien apgrūtina un sarežģī valsts pārvaldes lēmuma pieņemšanu un īstenošanu.

Valsts pārvaldes darbībā, lai mazinātu sociālo spriedzi un iesaistītu sabiedrības mazākumu, kā arī lai panāktu pieņemtā lēmuma atbilstību sabiedrības esošajām un nākotnes vajadzībām, nozīmīga loma ir ANO astoņiem labas pārvaldības galvenie principiem jeb vērtībām (Sheng, 2009). Tie ir līdzdalība, atklātība, konsenss, atskaitīšanās, atsaucība, efektivitāte, vienlīdzība un tiesiskums, no kurām lielākā daļa nav ieviešami un īstenojami bez valdības publiskajām attiecībām.

Atklātība kā garants valsts pārvaldes darbībai sabiedrības interesēs

Kā nozīmīgākais labas pārvaldības princips valsts pārvaldē, kas saistīts ar valdības publiskajām attiecībām, minams atklātība jeb caurspīdīgums, kas nodrošina lēmuma pieņemšanu un tā izpildi atbilstoši likumam un noteikumiem. Šī principa ieviešanai nepieciešams, pirmkārt, nodrošināt brīvu informācijas pieejamību valsts pārvaldē un, otrkārt to, lai informācija sasniegtu tos sabiedrības grupas vai indivīdus, uz kurām attiecas lēmums un tā īstenošana. Tādējādi valdības publisko attiecību uzdevums šajā kontekstā ir sniegt sabiedrībai un medijiem informāciju par pieņemtajiem lēmumiem vienkāršā un viegli saprotamā formā. Bieži vien valsts pārvaldes pieņemtie lēmumi iedzīvotājiem tiek skaidroti ar tēlu sistēmas palīdzību sadzīves līmenī saprotamā un viegli uztveramā formā, t.i., likums vai tā norma tiek skaidrota caur ikdienišķu situāciju ar spilgtiem un emocionāliem tēliem. Tomēr valdības publiskajās attiecībās, bieži pielāgojoties gan mediju, gan sabiedrības vajadzībām, sastopami arī tādi elementi kā vienkāršošana, medijiem atbilstošs apstākļu saīsinājums, simbolizēšana un personalizācija. Tāpat jāatzīmē, ka valdības publiskajās attiecībās ir vērojami arī dažādu valsts politiķu un ierēdņu publicitātes meklējumi, izmantojot speciālos pasākumus, kuri nav tieši saistīti ar darbu valsts un sabiedrības labā. Vācu filozofs Jurgens Hābermass uzsver, ka integrētās mārketinga komunikācijas attīstība ir veicinājusi to, ka privāti uzņēmumi rada savos pircējos ideju, ka savos patērēšanas lēmumos viņi darbojas kā

pilsoņi, un savukārt valstij jāvēršas pret saviem pilsoņiem kā patērētājiem. Rezultātā valsts pārvaldes iestādes sacenšas par publicitāti, nevis veido divvirzienu komunikāciju ar sabiedrību (Habermas, 1989).

Vēl viens nozīmīgs labas pārvaldības princips, kas cieši sasaistīts ar valdības publiskajām attiecībām, ir atskaitīšanās sabiedrībai un ieinteresētajām pusēm, t.i., tiem, kurus ietekmē tās darbībai vai pieņemtais lēmums. Jāatzīmē, ka šie labas pārvaldības principi - valsts pārvaldes darbības atklātība, caurspīdīgums un atskaitīšanās nav tikai labas gribas izpausme, bet arī normatīvajos aktos noteikts valsts pārvaldes pienākums. Normatīvajos aktos nostiprinātās sabiedrības tiesības saņemt informāciju un valsts pārvaldes institūciju pienākums sniegt informāciju ir viens no priekšnoteikumiem tās darbībai sabiedrības interesēs, jo informācijas atklātība un pieejamība nodrošina valsts pārvaldes darbības pārskatāmību un sabiedrība var gūt pārliecību, ka valsts pārvalde darbojas tās interesēs.

Latvijas valdības publisko attiecību aizsākums meklējams deviņdesmito gadu vidū. Valsts pārvaldes komunikācijas mērķi pirmoreiz tika definēti 1995. gadā, Ministru kabinetam (MK) pieņemot „Valsts reformu koncepciju", kurā kā viens no valsts reformu virzieniem tika noteikta reforma valsts varas un sabiedrības attiecībās, lai veicinātu iedzīvotāju iesaistīšanos un ieinteresētību valsts pārvaldes procesos, kā arī nodrošinātu iespēju sabiedrībai iegūt aktuālu un precīzu informāciju par valsts pārvaldē notiekošo. Savukārt no 2001. gada līdz 2010. gadam Latvijas valdības komunikācijas politiku noteica MK apstiprinātās „Valdības komunikācijas politikas pamatnostādnes", kā mērķi izvirzot efektīvu valsts pārvaldes un iedzīvotāju mijiedarbību. Lai nodrošinātu sabiedrības atbalstu un piedalīšanos krīzes pārvarēšanai, kā arī sabiedrības informēšanu par pieņemtajiem lēmumiem, līdzšinējās „Valdības komunikācijas politikas pamatnostādnes" 2010.gadā tika aizstātas ar Valsts pārvaldes komunikācijas pasākumu plānu valsts krīzes seku pārvarēšanas periodam – līdz 2012.gadam, kā mērķi nosakot nodrošināt plānotu, saskaņotu un koordinētu komunikāciju par valsts būtiskākajām darbības prioritātēm un lēmumiem sociāli ekonomiskās un politiskās krīzes laikā.

Šīs izmaiņas Latvijas valsts pārvaldes komunikācijas politikā, kas radušās ekonomiskās krīzes ietekmē, valsts pārvaldes institūcijām optimizējot savas funkcijas, vienlaikus ir arī veicinājušas valsts pārvaldes komunikācijā nepieciešamību meklēt jaunus komunikācijas kanālus un metodes, jo ministrijās komunikācijas funkciju veicēju skaits ir samazinājies par vienu trešdaļu: 2010.gadā ministriju komunikāciju nodrošināja 67 speciālisti, 2007.gadā – 96 speciālisti. Tādējādi var secināt, ka Latvijas valsts pārvaldes komunikācijā, līdzīgi kā daudzu citu valstu institūcijās arvien vairāk nepieciešams izmantot komunikācijas speciālistu zināšanas, jaunāko informācijas un

komunikācijas tehnoloģiju iespējas, kā arī jaunrades pieeju. Kā galvenās publisko attiecību aktivitātes komunikācijas pasākumu plānā minētas: mediju attiecību veidošana, mājaslapu pilnveidošana un aktualizācija, sociālo mediju un dažādu e-risinājumu izmantošana, diskusiju, semināru un citu pasākumu rīkošana. Jāmin, ka pilnveidojot valdības publiskās attiecības, pakāpeniski vērojams arī sabiedrības uzticības pieaugums valsts pārvaldes institūcijām, tā, piemēram, Eirobarometra dati liecina, ka „kopš 2010. gada pavasara palielinājusies uzticēšanās arī Latvijas valdībai (par 7 PP, no 13% līdz 20%) un Saeimai (par 9 PP, no 6% līdz 15%)" (Eirobarometrs, 2010). Tomēr norisot sociālām un ekonomiskām izmaiņām sabiedrībā, attīstoties informācijas tehnoloģijām, kā arī mainoties sabiedrības komunikācijas paradumiem, Latvijas valdības publisko attiecību būtiskākais izaicinājums ir spēja pielietot jaunus sadarbības un līdzdalības mehānismus, kas vairotu ikviena iedzīvotāja līdzatbildību par valsts izaugsmi un sabiedrības labklājību.

Sabiedrības līdzdalības loma publiskās pārvaldes optimizācijā

Analizējot ANO formulētos labas pārvaldības principus, kā stūrakmens valsts pārvaldes optimizācijas kontekstā minama līdzdalība, kura demokrātiskā sabiedrībā varbūt gan tieša, gan pārstāvnieciska. Jāatzīmē, ka, lai attīstītu līdzdalību, jābūt nodrošinātām divām pamatbrīvībām – biedrošanās un vārda brīvībai, jo līdzdalība nav iespējama bez augsta sabiedrības informētības līmeņa no vienas puses un labi organizētas pilsoniskās sabiedrības no otras puses. Ņemot vērā to, ka valsts pārvaldes uzdevums ir kalpot sabiedrībai un veicināt valsts attīstību, nozīmīgs labas pārvaldības princips ir valsts pārvaldes atsaucība jeb operativitāte, lai nodrošinātu to, ka valsts pārvaldes institūcijas un tās iniciētie procesi reaģē uz sabiedrības vajadzībām un gaidām saprātīgā laika termiņā, pie tam dodot iespēju lēmumu pieņemšanā iesaistīties visām ieinteresētajam pusēm. Šis princips cieši sasaistīts ar orientāciju uz konsensu, jo dažādām sabiedrības grupām un indivīdiem ir atšķirīgas vajadzības un viedokļi par to, kā labāk nodrošināt valsts attīstību un sabiedrības labklājību. Laba pārvaldība liek valsts pārvaldei būt vidutājiem starp dažādām sabiedrības vajadzībām un nodrošināt konsensa sasniegšanu, saskaņojot sabiedrības intereses un meklējot optimālāko risinājumu, kas vislabāk atbilst sabiedrības interesēm kopumā. Šāda lēmumu pieņemšana, saskaņojot sabiedrības intereses, prasa no valsts pārvaldes arī skaidru un visaptverošu ilgtermiņa perspektīvu par sabiedrības ilgstpējīgu attīstības vajadzībām un optimālākajiem tās sasniegšanas veidiem. Konsensa panākšana sabiedrībā paredz arī tāda principa nepieciešamību kā vienlīdzība un nediskriminācija, jo demokrātiskā valstī sabiedrības labklājība ir lielā mērā atkarīga no garantijām un pārliecības, ka visi sabiedrības locekļi jūt valsts pārvaldes ieinteresētību tās

problēmu risināšanā un nejūtas atstumti tādēļ, ka nepieder pie valdošā vairākuma. Valsts pārvaldes uzdevums ir nodrošināt iespēju sasniegt vai saglabāt noteiktu savas labklājības līmeni visām grupām īpaši, vājākām un mazaizsargātām.

Šo principu – līdzdalības, atsaucības, orientācijas uz konsensu, vienlīdzības un nediskriminācijas – īstenošana ir cieši saistīta ar sabiedrības iesaistīšanu un interešu saskaņošanu un ievērošanu valsts pārvaldes darbībā, tādējādi tie uzskatāmi par svarīgākajiem principiem, kuri nodrošina valsts pārvaldes un sabiedrības viedokļa optimizāciju un ar kuru palīdzību pilsoniskā sabiedrība var regulēt sociālo homeostāzi un katrā konkrētā gadījumā īstenot vajadzīgās sociālās izmaiņas. Pilsoniskās sabiedrības, NVO un valsts varas attiecības ir process, kurā ir iesaistītas divas puses un kurš prasa arī attiecību formalizēšanu, jo tiesiskā valstī valsts pārvaldes darbība un likumdošana var iejaukties tikai noteiktā kārtībā.

Latvijas valdības un NVO attiecību formalizācijas procesu aizsākās 1993. gadā līdz ar Valsts reformu ministrijas izveidi un turpinās šobrīd kā Nevalstisko organizāciju un Ministru kabineta sadarbības memoranda īstenošanas padomes aktīva darbība. „Nevalstisko organizāciju un valdības sadarbības memorandu", kura mērķis ir veicināt efektīvas un sabiedrības interesēm atbilstošas valsts pārvaldes darbību, nodrošinot pilsoniskās sabiedrības iesaisti lēmumu pieņemšanas procesos, 2005. gadā parakstīja 57 NVO un toreizējais Ministru prezidents Aigars Kalvītis. Sešu gadu laikā šim dokumentam ir pievienojušās 237 NVO. Jāatzīmē, ka kopumā Uzņēmumu reģistrā kopš 1991. gada 1. aprīļa ir reģistrētas 14 585 NVO, tādējādi var secināt, ka iniciatīvu iesaistīties dialoga veidošanā ar valdību ir izrādījušas tikai 1,6% no NVO, kuras tomēr uzskatāmas par aktīvāko un organizētāko pilsoniskās sabiedrības sastāvdaļu.

Nozīmīgākais valsts pārvaldes un sabiedrības viedokļa optimizācijas mehānisms ir NVO līdzdalība normatīvo aktu izstrādes gaitā. Tiesību aktu projektu analīze, kura aptver 6055 tiesību aktu un politikas plānošanas dokumentu projektu laikā no 2004. gada janvāra līdz 2006. gada aprīlim, liecina, ka vidēji tikai 12% projektu ir norādīts, ka lēmumprojekta izstrādē ir notikušas konsultācijas ar NVO (Majore, 2006). Tomēr jāatzīmē, kā pakāpeniski ir vērojama gan lielāka NVO iniciatīva, gan ministriju aktivitāte, iesaistot NVO tiesību aktu izstrādē. 2010. gadā ministriju izstrādāto tiesību aktu projektu un politikas plānošanas dokumentu skaits kopumā ir bijis 1374, tostarp 239 jeb 17% projektu un dokumentu izstrādē gaitā darba grupās bija iekļauts NVO pārstāvis, 159 jeb 12% projektu un dokumentu tika apspriesti konsultatīvajās padomēs ar NVO līdzdalību, 267 jeb 19% projektu un dokumentu izstrādē NVO pārstāvji tika piesaistīti kā eksperti. Savukārt par 552 jeb 40% projektiem un dokumentiem tika saņemti NVO atzinumi, kas liecina par samērā augstu NVO iniciatīvas un līdzdalības pakāpi. Vēl kā NVO līdzdalības veidi valsts pārvaldē

ir attīstīti šādi: pastāvīgās konsultatīvās padomes un darba grupas ministrijās, sabiedriskās apspriedes, publiskās apspriešanas, konferences, izglītojoši un informatīvi semināri.

No 1993. gada līdz 2011. gadam Latvijas valdības ir pieņēmušas vairākus normatīvos aktos, kuros tika noteikti skaidri rāmji, kā NVO iesaistās valsts pārvaldes lēmumu pieņemšanā, kā arī jau ir izveidojusies laba prakse. Latvijas valdību pieņemto dokumentu analīze liecina, ka NVO līdzdalība valsts pārvaldē tiek nodrošināta ar reglamentējošiem dokumentiem, nosakot principus NVO iesaistīšanai lēmumu pieņemšanā, kā arī nepieciešamību un pienākumu informēt sabiedrību, tādējādi NVO ir nodrošināta līdzvērtīga partnera loma sabiedrības pārvaldē.

Analizējot NVO vietu un nozīmi mūsdienu sociāli politiskajos procesos, ir redzams, ka šis darbības vektors, kur NVO kā valsts pārvaldes funkciju īstenošanas dalībnieks piedalās lēmumu pieņemšanā atbilstoši kādas sabiedrības grupas interesēm, nav vienīgais. Otrs NVO darbības vektors izpaužas kā protests pret politiskiem un/vai administratīviem lēmumiem, kad NVO ir sabiedrības aktivizētāji un sabiedriskās domas veidotāji. Īpaši kritiskos gadījumos NVO darbojas kā protestētāji, mēģinot mainīt vai atcelt kādu valsts pārvaldes lēmumu un piesaistot sabiedrības uzmanību ar radikāliem paņēmieniem, piemēram, dažādas krīzes situācijas, kad kādas izmaiņas valsts pārvalde pieņem (vai nepieņem) sabiedrības spiediena rezultātā. Šis spiediens var izpausties kā demonstrācijas un citas protesta akcijas, kurām piemīt izteikti komunikatīvas darbības spēks, kuras, pēc vācu filozofa J. Hābermasa domām, savā būtībā ir vērstas uz vēstījuma nodošanu, bet pēc savām funkcijām – uz pārrunām, jo to mērķis ir padarīt vēstījumu par sabiedriskās apspriešanas priekšmetu un sasniegt konsensu (Habermas, 1995). Komunikācijas procesā katra tā dalībnieka galvenais mērķis, pēc J. Hābermasa uzskata, ir panākt sava viedokļa atzīšanu, un tāpēc tas cenšas problematizēt (piemēram, ar protesta akcijām) visas sabiedrības vai kādas atsevišķas grupas viedokli. Tātad var noteikt divus svarīgākos NVO darbības vektorus: pirmais ir NVO līdzdalība valsts pārvaldē, tajā skaitā arī dalība lēmuma pieņemšanas procesos, kurai nepieciešama piekrišana no politiskās varas puses un regulēšana ar normatīvo aktu palīdzību, kas nosaka valsts pārvaldes un NVO sadarbības telpu un formas, kā arī valsts pārvaldes un NVO tiesības un pienākumus. Otrs NVO vektors nav atkarīgs ne no politiskās varas piekrišanas, ne no valsts varas pieņemto normatīvo aktu regulēšanas, tieši pretēji – tas ir protests pret politiskās /administratīvās varas lēmumiem, bieži neievērojot normatīvos aktus un dažkārt pat apdraudot sabiedrisko kārtību ar vardarbīgiem protestiem. Šajā gadījumā ar dažādiem paņēmieniem, kas kādreiz robežojas pat ar skandālu, lai nodrošinātu masu mediju interesi un gūtu problēmas publicitāti, NVO piedalās publiskajās, racionāli kritiskajās debatēs, un to nolūks ir mainīt ne tikai kādu valsts pārvaldes lēmumu, bet arī sabiedrības vērtību sistēmu.

Noslēdzot ANO formulēto labas pārvaldības principu analīzi valsts pārvaldes optimizācijas kontekstā, minami vēl divi nozīmīgi principi – efektivitāte un rezultativitāte, kā arī tiesiskums jeb likuma vara. Kalpojot sabiedrības vajadzībām un nodrošināt tās interešu realizāciju, valsts pārvaldei jāievēro efektivitāte un rezultativitāte, t.i., valsts institūcijas, to pieņemtie un īstenotie lēmumi rada rezultātu, kas atbilst sabiedrības vajadzībām un gaidām, pie tam maksimāli lietderīgi un optimāli izmantojot tai atvēlētos resursus, kā arī rūpējoties par to atjaunošanu. Kā pēdējais labas pārvaldības princips minams tiesiskums jeb likuma vara, kas nodrošina visu iepriekšminēto principu ievērošanu, jo tikai pastāvot godīgai un taisnīgai likumdošanai, kas aizsargā cilvēktiesības, īpaši mazākuma, iespējams īstenot citus labas pārvaldības principus – vienlīdzību, nediskrimināciju, atskaitīšanos, caurspīdīgumu u.c. Būtībā labas pārvaldības principos ietvertās vērtības ir ceļš uz ideālu demokrātiskas valsts pārvaldes modeli, kas nodrošina ilgstpējīgu sabiedrības attīstību un labklājību (Sheng, 2009). Labas pārvaldības principi, kuru īstenošana nav iespējama bez publiskajām attiecībām, nodrošina valsts pārvaldes optimizāciju – pieņemt optimālāko lēmumu, saskaņojot sabiedrības grupu intereses, un efektivitāti – īstenot pieņemto lēmumu ar vismazāko resursu patēriņu, publisko attiecību procesā nodrošinot sabiedrības informētību par pieņemto lēmumu un līdz ar to veicinot arī sabiedrības rīcību atbilstoši pieņemtajam lēmumam. Valsts pārvaldes optimizācija ir tās spēja darboties atbilstoši sabiedrības vajadzībām un interesēm, kuras var tikt izpaustas, apzinātas un saskaņotas, kā to paredz labas pārvaldības principi, tikai publisko attiecību procesā.

Secinājumi

1. Mijiedarbība starp valsts pārvaldi un sabiedrību nodrošina sabiedrības interešu saskaņošanu un veicina sabiedrības vajadzībām atbilstošākā un optimālākā lēmuma pieņemšanu, vienlaikus tomēr arī apgrūtinot lēmumu pieņemšanas un īstenošanas gaitu.
2. Valsts pārvaldes darbībā atbilstoši sabiedrībai interesēm un vajadzībām nozīmīga loma ir ANO formulētiem labas pārvaldības principiem: līdzdalība, atklātība, konsenss, atskaitīšanās, atsaucība, vienlīdzība, efektivitāte un likuma vara, no kurām lielākā daļa nav ieviešami un īstenojami bez valdības publiskajām attiecībām.
3. Valsts pārvaldes darbības atklātība, caurspīdīgums un atskaitīšanās nav tikai labas gribas izpausme, bet arī normatīvajos aktos noteikts valsts pārvaldes pienākums, kas uzskatāms par vienu no priekšnoteikumiem tās darbībai sabiedrības interesēs.
4. Kā galvenais Latvijas valdības publisko attiecību mērķis ir tikusi izvirzīta efektīva valsts pārvaldes un iedzīvotāju mijiedarbība. 2010.gadā pieņemtais komunikācijas pasākumu plāns

paredz nodrošināt plānotu, saskaņotu un koordinētu komunikāciju par valsts būtiskākajām darbības prioritātēm un lēmumiem sociāli ekonomiskās un politiskās krīzes laikā.

5. Šādi labas pārvaldības principi – līdzdalība, atsaucība, orientācija uz konsensu, vienlīdzība un nediskriminācija – nodrošina valsts pārvaldes un sabiedrības viedokļa optimizāciju, pilsoniskajai sabiedrībai sniedzot iespēju regulēt sociālo homeostāzi un nepieciešamības gadījumā īstenot vajadzīgās sociālās izmaiņas.
6. Nozīmīgākais valsts pārvaldes un sabiedrības viedokļa optimizācijas mehānisms ir NVO līdzdalība normatīvo aktu izstrādes gaitā. Latvijā pakāpeniski ir vērojama gan lielāka NVO iniciatīva, gan ministriju aktivitāte, iesaistot NVO pārstāvjus tiesību aktu izstrādē.
7. NVO līdzdalība valsts pārvaldē tiek nodrošināta ar reglamentējošiem dokumentiem, nosakot principus NVO iesaistīšanai lēmumu pieņemšanā, kā arī nepieciešamību informēt sabiedrību.
8. Viens NVO darbības vektors ir līdzdalība valsts pārvaldes funkciju īstenošanā un lēmumu pieņemšanā atbilstoši kādas sabiedrības grupas interesēm. Otrs izpaužas kā protests pret valsts pārvaldes lēmumiem, NVO aktivizējot sabiedrību un veidojot sabiedrisko domu.
9. Labas pārvaldības principi nodrošina valsts pārvaldes optimizāciju – pieņemt optimālāko lēmumu, saskaņojot sabiedrības grupu intereses, un efektivitāti – īstenot pieņemto lēmumu ar vismazāko resursu patēriņu, publisko attiecību procesā nodrošinot sabiedrības informētību par pieņemto lēmumu un veicinot arī sabiedrības rīcību atbilstoši pieņemtajam lēmumam.

Izmantoto literatūras avotu saraksts

1. Habermas J. The Structural Transformations of the Public Sphere. – Cambridge: Polity Press, 1989 – 301 pp.
2. Habermas J. Moral Consciousness and Communicative Action. – Cambridge: Polity Press, 1995 – 225 pp.
3. Majore M. Nevalstisko organizāciju un valdības sadarbība Latvijā. // Uncertain Transformation – New Domestic and International Challenges. - Rīga: Latvijas Universitāte, 2006. – 133.-147.lpp.
4. Valsts reformu koncepcija // Laikraksta Diena pielikums Saeimā un Ministru kabinetā. – 25.01.1995.
5. Eirobarometrs 74. Sabiedriskā doma Eiropas Savienībā. Rudens 2010. Skat. 21.06.2011. http://ec.europa.eu/public_opinion/archives/eb/eb74/eb74_lv_lv_nat.pdf
6. Lursoft statistika. Biedrības un nodibinājumi, sabiedriskās organizācijas. Skat. 01.07.2011. http://www.lursoft.lv/lursoft-statistika/Biedribas-un-nodibinajumi-sabiedriskas-organizacijas
7. Nevalstisko organizāciju un Ministru kabineta sadarbības memoranda īstenošana 2010.gadā. Skat. 30.06.2011. http://www.mk.gov.lv/lv/sabiedribas-lidzdaliba/sadarbibas-memorands/
8. Nevalstisko organizāciju un valdības sadarbības memorands. Skat. 28.06.2011. http://www.mk.gov.lv/lv/sabiedribas-lidzdaliba/sadarbibas-memorands/
9. Sheng, Y.K. What is Good Governance? Skat. 25.05.2011. http://www.unescap.org/pdd/prs/ProjectActivities/Ongoing/gg/governance.pdf
10. Valdības komunikācijas politikas pamatnostādnes 2008. – 2013. gadam. Skat. 28.07.2009. http://www.mk.gov.lv/doc/2005/MKPamn_171207.doc
11. Valsts pārvaldes komunikācijas un koordinācijas pasākumu plāns 2010.- 2012.gadam. Skat. 30.05.2011. http://www.mk.gov.lv/lv/mk/tap/?pid=40175538

LATVIAN MIGRANT WORKERS' EXPERIENCE OF DISCRIMINATION IN THE REPUBLIC OF IRELAND

Pierce Parker, BSc, MBA, MA, Doctoral Candidate,
Department of Sociology, University of Limerick, National Technological Park,
Castletroy, Co. Limerick, Republic of Ireland
<<pierce.parker@ul.ie>>
353 61 202 670

Abstract. In 2009 and 2010, through a nation-wide research study conducted at the University of Limerick, over 250 Latvians residing in the Republic of Ireland were asked about their experience of discrimination in employment. They were asked three specific Likert-scale questions and one open-ended question dealing with discrimination through their first-hand experience; perceptions in general about discrimination against Eastern European and Baltic migrant workers; and about the Irish employers. Then the results were compared against the responses from Lithuanian, Polish, and Slovak respondents.

Statistical analyses indicate that the Latvian respondents did not express any more or less compelling cases of discrimination *vis-à-vis* the other three nationalities groups studied. Chi-square analyses of the three questions on the experience of discrimination were inclusive. This paper, however, offers some explanations as to why the stories of discrimination and incidents of negative experience from the Latvian migrant workers in the Republic of Ireland were not present and proposes for a further longitutial study in 2015.

Key Words: Respondent-Driven Sampling, immigration, discrimination, collective threat, prejudice, EU labour migration, Latvian, Lithuanian, Polish, Slovak migrant labour in the Republic of Ireland.

Introduction

Quillian (1995) developed a theory of prejudice toward groups based on collective threat and proposed that collective threat is a function of the size of the subordinate group relative to the dominant group and economic factors (586). On May 1, 2004, Latvia was one of the new 10 EU member states that joined the existing 15 EU member states. Since then, approximately 60,000 people have left Latvia and chosen to find work in the United Kingdom, Sweden, and the Republic of Ireland, the three existing EU member states that placed no restrictions on their labour markets against the new EU10 member state nationals (Latvijas Ārpolitikas institūts Konrāda Adenauera fonds, 2006: 52).

By September 2005, nearly 19,915 Latvians were working in the United Kingdom, based on the data from the UK Worker Registration Scheme (Latvijas Ārpolitikas institūts Konrāda Adenauera fonds, 2006: 52). The other 40,000 are thought to have sought work in Sweden and the Republic of Ireland (Latvijas Ārpolitikas institūts Konrāda Adenauera fonds, 2006: 52). It is estimated that approximately 15,000 to 20,000 are located in the Republic of Ireland although the numbers are relative and changing, thus might not be exact. According to unofficial data, the number of people who have left could fluctuate by some 30% (Latvijas Ārpolitikas institūts Konrāda Adenauera fonds, 2006: 52 – 53). Furthermore, it is no secret that the Republic of Ireland has now been experiencing an economic downturn since the collapse of its bubble economy (so-

called the "'Celtic-Tiger' Years"), and its unemployment rate by December 2009 reached a staggering 12.9% (Quinn, 2010: 1).

It is within this unique historical context that this paper explores the collective experience of discrimination as expressed by Latvian migrant workers in the Republic of Ireland. According to Quillian's theory, the two ingredients are clearly present for the correct recipe: Estimated 20,000 Latvian migrant workers at a time when there was a sudden and relative increase in the unemployment rate. In a country where its inhabitants number approximately 4.24 million in 2006 (Quinn, 2010: 1), Latvians would make up slightly less than 0.5% of the population, thus they would comprise a large number relative to the Irish native.

In the Republic of Ireland, there is a concentration of migrant workers from the EU10 states in the construction, manufacturing, agriculture, healthcare, and hospitality sectors (Doyle *et al*, 2006: 72; and Ruhs, 2006). Previous research findings made it clear that employers in the Republic of Ireland have had access to an almost unlimited pool of relatively well-qualified EU10 migrants who could be employed in low-skilled jobs at wages and conditions that were rock bottom, or sometimes even lower than the minimum standards set out in employment laws and regulations (Ruhs, 2006). Due to the fact that profit-maximising employers would exploit the EU10 migrant workers by discriminating in terms of different wages among workers and of different EU10 nationalities based on differences among the real wages prevailing in their countries of origin, this paper attempts to investigate the possible existence of such discrimination based on nationality.

It has already shown that the Latvians were ranked the lowest among the four most populous new EU10 member state migrant workers in the Republic of Ireland in terms of their labour market performances (Parker and Halpin, 2011: 17). Whereas Slovaks earned €13.30 per hour (SD = 7.38), Poles €12.97 (SD = 6.11), and Lithuanians €12.46 (5.65), Latvians reported only €11.16 (SD = 3.19), at a time when the Irish legal minimum wage was at €8.65 per hour (Parker and Halpin, 2011: 17). Noting that this labour market performance sequence exactly coincided with the GDP per capita ranking sequence, Parker and Halpin (2011) speculate that the reserve wage of the home countries did have some relative predictive power on how they would perform in the Irish labour market (19 – 20). Since the Latvian cohorts ranked the lowest in the Irish labour market, this paper chooses to place a greater amount of focus on the experience of discrimination as expressed by the Latvians and attempts to extract their collective accounts of discrimination. O'Connell and McGinnity (2008) find that non-Irish nationals are three itmes more likely to experience discrimination while searching for employment than the Irish natives. McGinnity *et al* (2009) also report that job applicants with typical Irish names are more than twice as likely to be

called in for interviews as applicants whose names are identifiably non-Irish family names although they both apply with virtually equivalent *curriculam vitaes,* and their findings are statistically robust and consistent across the three different types of occupations tested (iii).

Barrett and Duffy (2007), however, offer an alternate prediction. They hypothesise that since the inward migration into the Republic of Ireland took place during the time when the Irish economy has been expanding at a high rate between 2004 and 2007 in the "Celtic Tiger" Years, the economic conditions have been relatively favourable for the EU10 migrant workers in the Irish labour market (Barrett and Duffy, 2007: 5), including for the Latvians. Moreover, because the vast majority of the immigration into the Republic of Ireland has been from other European countries, many of the immigrants into Ireland might not have been subject to the common forms of possible discrimination such as those based on race, colour, or religion. These positive factors could work in such a way to set the recent Latvian immigrants into the Republic of Ireland fairing relatively well *vis- à-vis* Irish natives (Barrett and Duffy, 2007: 5). Based on analysis from level of education and labour market performances of the EU10 migrant workers, Barrett and McCarthy (2007) "suggest that a general form of discrimination is not in operation, but instead that immigrants with third level qualifications are unable to exploit their education to the fullest degree (17)," possibly due to their nature of employment in the Republic of Ireland. Low returns to education, especially among the female cohorts, might mean that there is relatively little occupational variation among them, and almost all EU10 migrant workers in the Republic of Ireland are in similar low-skilled, manual occupations such as in hotel and restaurants, retail services, construction, etc., even if they are qualified for highskill jobs.

In these low-skilled occupations, their higher levels of education would not carry much relevance. This is also attested by the fact that as the labour market performance ranking sequence decreased from the Slovak cohorts to the Latvian cohorts in Parker and Halpin's research study (2011: 17), the standard deviations on their hourly wage also decreased markedly from 7.38 to 3.19, meaning that there seemed to be very little variations on the types of their occupations in the Republic of Ireland. Thus, given these two competing hypotheses, it would be worthwhile to enquire into which one might be more accurate in accessing the social reality of discrimination as expressed by Latvian migrant workers living in the Republic of Ireland, and this paper thus endeavours to find out.

Research Methods

The research for this survey was conducted on 1,144 self-identified EU10 migrant workers living in the Republic of Ireland in 2009 and 2010. The *Census 2006* (Central Statistics Office, 2008) shows the four most numerous EU10 nationalities in the Republic of Ireland were Polish (63,276), Lithuanian (24,628), Latvian (13,319), and Slovak (8,111). The sample for this research study focused on these four nationalities and was drawn based on a derivative of the snowball sampling method (Singleton and Straits, 1999: 162). Specifically, a variant of snowball sampling method (Goodman, 1961; and Singleton and Straits, 1999: 163), called, "respondent-driven sampling" method, or the "RDS" (Salganik and Heckathorn, 2004), was used.

RDS employes a method of chain referral system. When members of the target population are identified, these "seed" respondents are requested to refer the survey to other members of the same target population, who then are contacted and requested to refer others, and so forth (Singleton and Straits, 1999: 163). RDS was deliberately used because the sample in this study was deemed as a "hidden" population within Irish society; it was not reliably recorded anywhere; and it was not willing to advertise its immigrant status in the Republic of Ireland openly and flambouyantly for a research study. It is also utilised because it "is (also) cheaper, quicker, and easier to implement than other methods commonly used to study hidden populations" (Semaan *et al,* 2002).

RDS is specifically designed to solve the problem of conducting statistical analysis on a population that could not be sampled in a conventional random sampling methods. Hidden populations such as those that participate in stigmatised activities, members of subcultures, or recent immigrants, would pose problems for conventioanl survey research, making it almost impossible to get statistically valid samples.

RDS method was deemed to be highly appropriate for this study because migrant workers tend to "chain- migrate" (MacDonald and MacDonald, 1964). Chain-migration means that individuals move to another area or country in the train of others such as family and social contacts, who have moved there before them, and they would smooth their path in securing employment and housing.

For this research study, the potential respondents were told that they were participating in a national study about the state of EU10 migrant workers in the Republic of Ireland. As part of the survey, they were asked about their opinions and attitudes on a limited range of social topics and issues, including their experience of discrimination in employment in the Republic of Ireland.

Three Liker-scale questions specifically dealt with experience of discrimination, and they were: Question 22: *"I think there is prejudice against Eastern Europeans in the Irish job market;"* Question 25: *"I think there are employers in Ireland who would refuse a job to a person because of her race, religion, cultural background or nationality;"* and Question 28: *"In Ireland, I have been refused a job for reasons which I think were to do with my nationality."* Respondents were asked to choose one of the five-point Likert-scale responses, ranging from "Strongly Disagree" to "Strongly Agree." If these three questions on the experience of discrimination had formed an index, one factor could be extracted with an Eigenvalue of 1.815 that explains 60.503% of the variance with Cronbach's alpha = 0.673, which was relatively low for reliability.

The survey took about five to ten minutes to complete. The original English survey was translated into Polish, Lithuanian, Latvian, Slovak, and Russian, and was approved by the appropriate ethics committee authorities at the University of Limerick. The data collection on the Latvian and Polish cohorts began first in March 2009, the Slovak cohort in April 2009, and the Lithuanian cohort in June 2009. All four nationality groups had an overlapping period of 177 days from June 7, 2009 to December 31, 2009, or for about six months. The data were then cleaned, input into SPSS, and analysed for this paper. For analysis, we use chi-square tests among all four nationality groups and divided by gender for a closer look.

Results

Table 1. Demographics

Sex/Gender	FREQUENCY	PERCENT	VALID PERCENT
Female	690	60.3	60.3
Male	454	39.7	39.7
Nationality			
Polish	328	28.7	28.8
Lithuanian	282	24.7	24.8
Latvian	259	22.6	22.7
Slovak	246	21.5	21.6
Czech	5	0.4	0.4
Hungarian	4	0.3	0.4
Estonian	2	0.2	0.2
Russian	9	0.8	0.8
Ukrainian	3	0.3	0.3
Kazakh	1	0.1	0.1

Other/Missing	5	0.5

Age

Under 18	2	0.2	0.2
18 – 19	7	0.6	0.6
20 – 29	570	49.8	50.0
30 – 39	400	35.0	35.1
40 – 49	115	10.1	10.1
50 – 59	44	3.8	3.9
60 and over	2	0.2	0.2
Missing	4	0.3	
TOTAL	1144	100.0	

Chi-Square Analyses on Three Questions Dealing with Discrimination

Table 2.1. I Think That Prejudice against Eastern Europeans in the Irish Job Market Exists

Nationality (χ^2 Value)	Latvian	(1.775)	Lithuanian	(1.101)	Slovak	(12.624)	Polish	(2.816)
Gender	Male	Female	Male	Female	Male	Female	Male	Female
(n)	*(80)*	*(178)*	*(95)*	*(185)*	*(108)*	*(137)*	*(155)*	*(173)*
Strongly Agree/ Agree	32 (40.0%)	68 (38.2%)	26 (27.4%)	46 (24.9%)	52 (48.1%)	36 (26.3%)	52 (33.5%)	56 (32.4%)
Neither Agree Nor Disagree	19 (23.8%)	56 (31.5%)	43 (45.3%)	77 (41.6%)	34 (31.5%)	59 (43.1%)	37 (23.9%)	55 (31.8%)
Strongly Disagree/ Disagree	29 (36.2%)	54 (30.3%)	26 (27.4%)	62 (33.5%)	22 (20.4%)	42 (30.7%)	66 (42.6%)	62 (35.8%)
P-Value	*n. s.*	*n. s.*	*n. s.*	*n. s.*	*< 0.01*	*< 0.01*	*n. s.*	*n. s.*

Table 2.2. I Think That Irish Employers Would Refuse Jobs Based on Race, Religion, Cultural Background or Nationality

Nationality (χ^2 Value)	Latvian	(0.364)	Lithuanian	(2.831)	Slovak	(8.375)	Polish	(5.158)
Gender	Male	Female	Male	Female	Male	Female	Male	Female
(n)	*(80)*	*(178)*	*(94)*	*(185)*	*(109)*	*(137)*	*(155)*	*(172)*
Strongly Agree/ Agree	41 (51.2%)	84 (47.2%)	51 (54.3%)	81 (43.8%)	48 (44.0%)	37 (27.0%)	63 (40.6%)	71 (41.3%)
Neither Agree Nor Disagree	17 (21.2%)	41 (23.0%)	26 (27.7%)	60 (32.4%)	26 (23.9%)	49 (35.8%)	29 (18.7%)	48 (27.9%)
Strongly Disagree/ Disagree	22 (27.5%)	53 (29.8%)	17 (18.1%)	44 (23.8%)	35 (32.1%)	51 (37.2%)	63 (40.6%)	53 (30.8%)
P-Value	*n. s.*	*n. s.*	*n. s.*	*n. s.*	*< 0.05*	*< 0.05*	*n. s.*	*n. s.*

Table 2.3. In Ireland, I Have Been Refused a Job Because of My Nationality

Nationality (χ^2 Value)	Latvian	(1.113)	Lithuanian	(3.488)	Slovak	(7.390)	Polish	(1.827)
Gender	Male	Female	Male	Female	Male	Female	Male	Female
(n)	*(80)*	*(178)*	*(95)*	*(187)*	*(109)*	*(137)*	*(155)*	*(171)*
Strongly Agree/ Agree	17 (21.2%)	31 (17.4%)	20 (21.1%)	25 (13.4%)	18 (16.5%)	9 (6.6%)	16 (10.3%)	15 (8.8%)
Neither Agree Nor Disagree	10 (12.5%)	30 (16.9%)	21 (22.1%)	37 (19.8%)	18 (16.5%)	18 (13.1%)	20 (12.9%)	15 (8.8%)
Strongly Disagree/ Disagree	53 (66.2%)	117 (65.7%)	54 (56.8%)	125 (66.8%)	73 (67.0%)	110 (80.3%)	119 (76.8%)	141 (82.5%)
P-Value	*n. s.*	*n. s.*	*n. s.*	*n. s.*	*< 0.05*	*< 0.05*	*n. s.*	*n. s.*

Discussion

Table 2.1 shows that none of the chi-square test results is significant, except the Slovak cohorts whose male respondents expressed agreeing sentiments with the existence of prejudice against Eastern Europeans in the Irish job market. This is ironic given the fact that of the four nationality groups, Slovaks, especially, Slovak males, performed best in terms of their hourly earnings in the Irish labour market. Seen from another angle, however, this might be the indication and the expression of "glass ceiling" that they recognise. This pattern is repeated in Table 2.2 where the Slovak male respondents again expressed the statistically significant sentiments that Irish employers would refuse jobs based on their demographic factors.

While both Latvian male and female respondents concurred with the statement that Irish employers would refuse jobs based on race, religion, cultural background or nationality, the chi-square results are not significant. None of the four nationality groups, moreover, expressed any sentiments that it has been refused a job because of nationality. This is possibly because of the types of low-skilled jobs that they have been seeking in the Republic of Ireland where their levels of education, nationality, or any other demographic factors are irrelevant due to the low competitive nature of the occupations. Like elsewhere, here, again, only Slovak responses show statistical significances.

Conclusions

1. The results shown here may indicate that the prediction from Barrett and Duffy (2007) is supported. Their hypothesis is that since the inward migration into the Republic of Ireland took place during the time when the Irish economy has been expanding at a high rate during the "Celtic Tiger" Years, the economic conditions have been favourable for the EU10 migrant workers in the Irish labour market (Barrett and Duffy, 2007: 5). Furthermore, since the majority of the EU10 immigration into the Republic of Ireland has been from other European

countries, many of the EU10 immigrants into the Republic of Ireland might not have been experiencing the common forms of discrimination based on race, colour, or religion. These positive factors could work in such a way to set Quillian's theory of prejudice toward groups based on collective threat inapplicable in the Republic of Ireland – at least against the four EU10 migrant workers surveyed for this study.

2. On the other hand, however, there is another explanation for this. The experience of discrimination may need longer time to accrue. It may take one generation or even a life-time of small events and reflections. When this survey was taken, the vast majority of respondents had resided and had been working in the Republic of Ireland for less than five years. This is just too short of a time period to form any definitive opinions or sentiments on such complex and profound concept as experience of discrimination. It would require experience of attempting to switch jobs, of trying to advance one's career, of going to panel interviews, attempting to land high-skilled, high-paying competitive jobs, etc. This would require at least a dozen years of labour market experience, and thus, this survey might have been inadequate or too premature to gauge such complex and abstract sentiments as experience of discrimination, which also require a high degree of sophistication in suspicion, detection, and deduction. The respondents in this study might still have been too enthusiastic and glad to just be in the Republic of Ireland and be working. This sense of euphoria would necessarily preclude them from realising and sensing obvious incidents of discrimination and would attribute the causes to other non-benign factors.
3. There is still yet another possible explanation. There should exist smaller percentage of Irish population that is mostly likely to compete with EU10 migrant workers in the labour market since the Republic of Ireland has a relatively wealthy population. This would necessarily mean that the Republic of Ireland would have fewer citizens employed in low-skill occupations since most Irish natives tend to avoid these low-skill jobs. This would also necessarily mean that Irish employers would have fewer opportunities to discriminate against EU10 migrant workers in these low-skill occupations. This may explain why only Slovak responses are statistically significant and why only Slovak males agree with the sentiment that prejudice against Eastern Europeans in the Irish job market exists – because they are the cohorts that are most likely to compete with Irish natives, given their relatively higher labour market performances – and that Irish employers would refuse jobs based on race, religion, cultural background or nationality. Note that none expressed any statistically significant sentiment that it has been refused a job because of nationality precisely because hardly any cohort competes in a labour market

segment in which it is in direct competitions with Irish natives. These low-skill jobs are not the types of occupations in which nationality would pose any relevance or as a discriminating factor by Irish employers. Given these facts, it would be, therefore, safe for us to assume that the vast majority of the EU10 migrant workers are not in direct competitions with Irish natives in the Irish labour market, but *among* themselves for low-skilled occupations. Quillian (1995) also notes that "in Europe, wealth tends to decrease the competition for jobs and resources between immigrants and the host society" (p.592), and needless to say, the Republic of Ireland is a relatively wealthy nation in the twenty-first century world.

4. It would, therefore, compel us to question what the results might be if a same, or a similar, longitudinal study is to take place in 2015 and pose the same three questions to the same set of respondents. The results then may depict a completely different set of experience on discrimination in the Republic of Ireland.

References

1. Barrett, Alan, Adele Bergin, and David Duffy. (2006) "The Labour Market Characteristics and Labour Market Impacts of Immigrations in Ireland," *The Economic and Social Review,* Volume 37, Number 1, Spring 2006: pp. 1 – 26.
2. Barrett, Alan and Yvonne McCarthy. (2007) "The Earnings of Immigrants in Ireland: Results from the 2005 EU Survey of Income and Living Conditions," Working Paper Number 2006, August 2007, the Economic and Social Research Institute, Dublin, Republic of Ireland.
3. Central Statistics Office. (2008) *Census 2006: Non-Irish Nationals Living in Ireland,* June 2008, Dublin, Republic of Ireland: Stationery Office.
4. Doyle, Nicola, Gerard Hughes, and Eskil Wadensjö. (2006) "Freedom of Movement for Workers from Central and Eastern Europe: Experiences in Ireland and Sweden," Report Number 5, May 2006, Stockholm, Sweden: Swedish Institute for European Policy Studies.
5. Goodman Leo A. (1961) "Snowball Sampling," *the Annals of Mathematical Statistics,* Volume 32, Number 1, March, 1961: pp. 148 – 170.
6. Latvijas Ārpolitikas institūts Konrāda Adenauera fonds. (2006) „Latvijas imigrācijas politika: problēmas un perspektīvas," Rīga. Available from: http://www.liic.lv/uploads/filedir/File/LV_imigr_pol.pdf [Accessed on June 15, 2011].
7. MacDonald, John S. and Leatrice MacDonald. (1964) "Chain Migration, Ethnic Neighborhood Formation, and Social Networks." *Milbank Memorial Fund Quarterly,* Volume 42: pp. 82 – 97.
8. McGinnity, Frances, Jacqueline Nelson, Pete Lunn, and Emma Quinn. (2009) "Discrimination in Recruitment: Evidence from a Field Experiment," *Equality Research Series,* Dublin, Republic of Ireland: the Equality Authority.
9. O'Connell, Philip J. and Frances McGinnity. (2008) "Immigrants at Work: Ethnicity and Nationality in the Irish Labour Market," Equality Research Series, The Equality Authority, available: http://www.equality.ie/research [accessed 16 January 2009].
10. Parker, Pierce and Brendan Halpin (2011) "Eastern European and Baltic Migrant Workers' Labour Market Performances in the Republic of Ireland," *the Research West Review,* Sligo, Republic of Ireland: Word Press. Available from: http://researchwestreview.wordpress.com/ [Accessed on June 15, 2011].
11. Quillian, Lincoln. (1995) "Prejudice as a Response to Perceived Group Threat: Population Composition and Anti-Immigrant and Racial Prejudice in Europe," *American Sociolological Review,* Volume 60: pp. 586 – 611.
12. Quinn, Emma. (2010) *Focus Migration Country Profile: Ireland,* Profile Number 19. Hamburg, Germany: Hamburg Institute of International Economics. Available from : http://focus-migration.hwwi.de/uploads/tx_wilpubdb/CP_19_Ireland.pdf [Accessed on June 13 2011].
13. Ruhs, Martin. (2006) "Migrant Workers Face Tough Choices," Op-ed published in *The Irish Times,* May 17, 2006.

14. Salganik, Matthew J. and Douglas D. Heckathorn. (2004) “Sampling and Estimation in Hidden Populations Using Respondent-Driven Sampling,” *Sociological Methodology*, Volume 34: pp. 193 – 239.
15. Semaan, Salaam, Jennifer Lauby, and Jon Liebman. (2002) “Street and network Sampling in Evaluation Studies of HIV Risk-Reduction intervention,” *AIDS Reviews,* 2002, Volume 4: pp. 213 – 223.
16. Singleton, Royce A. and Bruce C. Straits. (1999) *Approaches to Social Research,* Third Edition, New York, NY: Oxford University Press.

A MODEL OF OPERATIONS CAPACITY PLANNING AND MANAGEMENT FOR ADMINISTRATIVE SERVICE CENTERS

МОДЕЛ ЗА ПЛАНИРАНЕ И УПРАВЛЕНИЕ НА КАПАЦИТЕТА НА ОПЕРАЦИИТЕ В ЦЕНТЪР ЗА АДМИНИСТРАТИВНО ОБСЛУЖВАНЕ

Yulia Yorgova, PhD, Burgas Free University, Faculty of Business Studies,
62, San Stefano St., 8000 Burgas, Bulgaria, yulia@bfu.bg, tel. +359898446682

Abstract: The presented model of operations capacity planning allows obtaining quantitative dimensions of the service system parameters for Administrative Services Center. A methodology for the practical application of this model has also been presented here. The present paper aims at offering support for operations managers in the service sector for decision making regarding the operations capacity.
Key words: service operations capacity, Queuing Theory, arrival rate, service rate, public services, administrative services

Introduction

The main objective of all Administrative Services Centers (ASC), which are a formal part of some Bulgarian municipalities, is to provide public and administrative services of the highest quality. Public and administrative services are client services and are comprised of two key elements- the final service outcome achieved and the client's experience while obtaining the service. In order for administrative and public services to be perceived to be of high quality, the client's expectations and requirements should be met. These clients requirements include easy access, timely service, flexibility, high levels of competence and politeness, to name a few. In order to achieve a high quality and timely service, the ASC's operations capacity to meet demand is of particular importance. The management of service capacity is an integral part of the operations management decision making framework. These types of decisions in the services field are usually made under great uncertainty and often in the absence of adequate quantitative assessment of the relevant variables. Therefore, in order to increase effectiveness in the operations manager's work it is necessary to employ more precise quantitative models.

The purpose of this paper is to present a model of operations capacity planning and management for public and administrative mass services. The methodology for the application of this model is also suggested for services offered by ASC of the Burgas municipality.

The effective management of service operations requires that the relevant managers make decisions regarding the following:

- Forecasting of demand (number of customers)
- Identifying the necessary operations capacity (number of service channels and staff)
- Deciding on staff scheduling

Similar decisions in operations management are usually made after an examination of the service system, following the gathering and processing of the required data, an analysis of the final results and the formulation of conclusions and recommendations for practice. In order to improve the decision making process, it is useful to employ models, which provide quantitative dimensions of the service system.

The main interest of the present paper is the service system for public and administrative services, where queuing is a common occurrence and where it is necessary to always match operations capacity and demand.

The main components of any service system are: clients, service channels, and a queue. In this paper, operations is a term which encompasses the entering and accepting of customers into the service system, organizing customers into a queue, providing the customers required service, and the customers exiting from the service system. The main reason for the emergence of a queue is an insufficient operations capacity. Queuing is a common occurrence for mass services, where there is a large size of arrival units (service centers, transport centers, banks, hospitals, call centers, restaurants airports, etc).

A more detailed analysis of the service system shows that queuing occurs when the arrival rate (average number of arrivals for a given period of time) exceeds the service rate (average number of served customers per given period of time). Discriminating between the above mentioned components of the service system and examining the interactions between them, indicated that one may view the queuing phenomenon as a system and therefore an analytical queuing model may be formulated.

It is clear that in the services, the managing of a queue is the approach through which, the most optimal combination of demand and operations capacity may be achieved. The queue takes the form of client “inventory”, which acts as a buffer between demand and operations capacity. Of course, the aim is to minimize this virtual storage, because this is of no use to customers or staff providing the required service.

Based on the above discussion, it is clear that in order to develop a model of operations capacity planning and management for public and administrative services, it is necessary to study the interaction between the arrival rate, service rate and queue. The model and methodology of the present paper is focused specifically on identifying the operations capacity required to meet the demand. This paper does not deal with estimating the optimal operations capacity because the optimal operations capacity aims to keep the total cost to a minimum but does not necessarily meet demand.

Research methods

Queuing Theory applied for operations capacity planning and management of mass services.

Because the delivery and consumption of a service occur simultaneously, the demand needs to be met precisely as it arises. This requires service organizations to estimate and then provide the right capacity at the right time. Insufficient or greater than necessary capacity leads to losses in the short and long-term.

Queuing Theory offers the instruments most suitable for queuing cases. (Winston, 2004, Fitzsimmons, 2004)

The main objective of Queuing Theory is to establish the relationship between variables **λ, μ** и **M**, where:

λ – arrival rate (average number of arrivals for a given period of time);

μ – service rate (average number of served clients for a given period of time);

M – number of working channels;

These **λ, μ** and **M** are the main variables of a service system. When planning and managing services, it is necessary to identify the precise capacity of the service system, which is directly related to arrival rate **λ** and the service rate of the system **Mμ**.

In order to develop a model for the mass services delivery system, it is needed to precisely identify the main characteristics of the service system. In particular:

- Arrival process.
- Physical features of the queue.
- Queue discipline.
- Service process.
- Exit.

In order for the services system to be comprehensively defined, in addition to the study of its main characteristics, the relationship and interactions between these characteristics should also be studied. Once all of the above has been studied, it is possible to use Queuing Theory to develop a model for the system.

The application of Queuing Theory follows the following assumptions: (Andronov, Alexandrova, 2004)

1. Simple arrival process, which is a homogeneous Poisson process.
2. Clients represent an infinite population

3. Inter-arrival time is exponentially distributed, and this means that the distribution of arrival units for a given period of time is a Poisson distribution.
4. Service times is exponentially distributed
5. All clients are served on a first come-first served (FCFS) bases.

The above discussed assumptions define the commonly accepted system for mass service, which according to Kendall-Lee notation (Winston, 2004) should be presented as: M/M/n/FCFS/∞/∞.

Once all relevant information about the service system has been collected and the system has been described, mathematical modeling of all characteristics of the system is performed. It should be kept in mind that all mathematical modeling represents a certain simplification of any given real life situation. This means that all conclusions drawn from mathematical modeling should be viewed with caution.

Model of operation capacity planning and management of public and administrative services

This model is developed in four consecutive steps using the above discussed theory.

Step one*:* In order to define the service system model according to the theoretical framework it is necessary to identify its main components first and then establish whether or not Queuing Theory assumptions are satisfied

- *Arrival process*

Arrival process is created by client demand for a given service. Those using public services offered by ASC may be thought of as part of a group with an infinite population. A customer exiting a queue does not significantly affect the system probabilities.

Customers enter the system one by one, independent of one another and from a large number of sources. This makes requests entering the system random by nature, and they form a simple arrival process. The arrival process has unchangeable characteristics for any given interval. During normal working hours, the arrival process for public services has peak and non-peak arrival intensity, and can therefore appear as changeable. If time is divided into equal, one hour intervals, the arrival process may be treated as unchangeable. The discussed simple arrival process meets the assumptions of a homogeneous Poisson process. The statistical data is checked to ensure it corresponds to the theoretical distribution of clients entering the service system.

The degree of customer patience is difficult to measure objectively. It is safe to say that public service customers fall into two categories – patient and impatient.

The simple arrival process cannot be controlled the way some other types of services are controlled through specific decisions regarding the management of demand.

➢ *Physical features of clients and queue discipline*

Every one of the six working stations is designed to handle one or more similar types of services jobs. Any given working station consists of two working desks (channels). The queue of clients is one for each working station. Every time a client exits a queue and a service has been provided, another client could immediately take his/her place. This makes the queue infinite in population length. Queue discipline is characterized as "first come, first served", or clients are serviced in the order in which they arrive

➢ *Service process*

Let us say that **M** is the number of working channels, which provide all types of public services. The service process is characterized by the following features:

- Average service time for one client **t** for any given interval, which has a negatively exponential distribution of probabilities;
- Maximum number of clients that can be served simultaneously corresponds to the number of working channels -**M**;
- Accessibility of servicing facilities – the system is completely accessible, because the channels may accept any subsequent client immediately after serving the previous client.

➢ *Exit*

Once a customer has been served there is a high probability of the customer returning to the source population and immediately becoming a competing candidate for service again, because the centre is the one offering the desired type of services.

Step two*:* When the system is clearly defined with all its components, it is then necessary to choose the most suitable mathematical model. Based on the characteristics identified in step one, the studied system is identified as multi-channel, single phase.

Step three*:* To clarify the functioning of the system and to draw conclusion regarding the system's capacity, it is necessary to calculate the relevant operational parameters. For the purposes of this study, the relevant operational parameters should be calculated for each working station: probability of no clients, $\mathbf{P_0}$, average number of clients in the system, **Ls**, average total time in system, **Ws,** average number of clients waiting in queue, **Lq,** average time waiting in queue, **Wq** .

Step four*:* At this stage, based on the calculated parameters, conclusions should be drawn regarding the volume and utilization of the capacity at any given time interval. Once that is done, decisions need to be made for possible modifications of the system.

The volume of capacity is determined by the number of channels **M** working simultaneously**,** and the average service time per customer. In practice, the operation managers of mass services cannot influence the arrival rate, unless they completely change the intensity by including or excluding entire groups of clients (e.g. demand by some villages of the municipality) A change of the system's capacity may be achieved by modifying the service process in two directions:

- By increasing or decreasing the number of working channels, depending on forecasting of service demand
- By improving the operations for the purpose of decreasing the average service time, particularly during the periods when the arrival rate, **λ,** is grater than the service rate, **μ**.

In order to choose which operation parameters should be estimated and analyzed, it is important to identify the key indicator necessary for the functioning of the system. One such indicator may be the waiting time or queue length, and also average total time in system or number of clients in the system. The chosen indicator will be the one, which is most relevant for the specific nature of the type of service and the targets set by management. If management aims to decrease or eliminate the queue, **Lq** should be studied and calculated. In cases when waiting time is limited, data for **Wq**. should be estimated and analyzed and so on. For the specific example used in this study, it is suitable to use both of the above mentioned parameters. A starting point in the analysis could be to decide on a standard for a desired waiting time length, so that clients will not have a negative experience. Once a standard has been accepted, and based on the analyzed data operation managers may decide with greater precision the exact necessary system's capacity, which will allow demand to be met and for management targets to be achieved.

Results and Conclusions

Methodology for application of the model with actual data from the ASC.

Employing this model and bearing in mind the type of service requested, specific methodology may be offered, to allow the use of this model with actual data. In this particular case, observations and data regarding citizenship status and registration were tested for a period of five consecutive months, for one working station with two channels. The methodology includes:

1. *Identifying the main components of the service system.*

This is the stage for data collection regarding the number of arriving clients for every one hour interval, for a full working day and the average service time, **t** [min]**,** for every client, per minute. For every one of the five months and for every time interval, **λ** [number per hour] and service rate **μ** were calculated. (Due to the large volume, when testing the model with actual data, the calculated parameters are not shown here).

The statistical data employed in this study were put under Kolmogorov – Smirnov test of goodness of fit. The results show that the arrival process has a Poisson distribution.

Physical characteristics and queue discipline identify the queue as unlimited in capacity. Service time is exponentially distributed.

2. The choice for a mathematical model for the system.

All above mentioned assumptions for the use of Queuing Theory are satisfied. The system is identified as two channeled, single phase. Using Kendall-Lee's notation, it is presented as: M/M/2/FCFS/∞/∞.

3. Calculating the operational parameters of the system.

The operational parameters calculated for every one hour interval of the full working day, for every month, with a different number **M** =1 ÷ 4 working channels are as follows: probability of no clients, $\mathbf{P_0}$, average number of clients in the system, **Ls**, average total time in system,**Ws ,** average number of clients waiting in queue, **Lq,** average time waiting in queue, **Wq** .

4. Formulating conclusions regarding system capacity utilization and decisions for possible changes to the operations capacity (if necessary) through a modification of the service process.

In order to reach conclusions, the length of the queue, **Lq** and the average waiting time**, Wq** [min], should be analyzed for the various number of working channels. Similar analyses may also be performed for the remaining parameters of the system, depending on the objectives of the study.

In the case of this study, if it is accepted that the maximum waiting time for a client to begin receiving service is 10 minutes, the results show that it is sufficient to have a maximum of three working channels simultaneously in order to meet demand. Bearing in mind the various levels of demand during the course of a working day, the length of a working shift, and the need for staff work breaks, the maximum number of staff needed during the peak periods is four. In this study, two channels were used and it was shown that this capacity was insufficient. This could be fixed

through the expansion of online public services of the ASC or by increasing the number of channels working during the peak periods.

Conclusions

1. This model allows the processing of quantitative data for the various parameters of the system. It also allows the operations manager to make the appropriate modifications of the system, depending on the key indicators decided upon.
2. This model may be applied for the purpose of operations capacity planning and management for all mass service systems, which allow the formation of queues, such as medical centers, supermarkets, airports, banks, call centers and others.
3. This model is suitable for emergency services. The difference in such services is that the operations capacity should be estimated to correspond to the maximum level of demand.
4. The testing of the model with actual data for administrative and public services from the ASC showed it to be applicable and useful in organizational practice.

References

1. Андронов, Ев., М.Александрова, Управление на операциите, УНСС, София, 2004
2. Fitzsimmons J.A., M.J. Fitzsimmons, Service Management: Operations, Strategy and Information Technology, Mc Graw Hill, Fourth Ed., 2004
3. Winston, W.L., Introduction to Probability Models. Operations Research, Volume Two, Fourth Edition, Thomson Brooks / Cole, 2004.

ENTREPRENEURIAL UNIVERSITY MODEL: CASE OF KNOWLEDGE FLOW ANALYSIS IN VUC

Dr.Chem. Valdis Avotins
Engineering Research Institute "Ventspils International Radio Astronomy Centre" of Ventspils University College
Mg.oec. Natalja Jarohnovich (corresponding author)
Technology Transfer Centre of Kurzeme of Ventspils University College
Inženieru Street 101a, Ventspils, LV – 3601, Latvia
E-mail: natalja.jarohnovica@venta.lv

Abstract. In this paper we have presented the first of a series of three cases investigating technology commercialisation motives. University – industry knowledge and technology transfer becomes increasingly important. Analysed information and collected data provide additional information that made more clear the approach allowing to a systematic model of the entrepreneurial university on the bases of a case study analysis of the regional university college.

Therefore, we feel that the research merits continuation with the aim to investigate how knowledge created in regional universities and research institutes, is integrated into commercialization process. Moreover, it will help to find out whether all knowledge acquisition opportunities are used in order to utilise them successfully.

The main tasks of the paper are the following:

- to identify and analyze the main modes of knowledge transfer in the commercialization process;
- to examine and analyze collaborative facilities between the academic and business environment;
- to view and compare the Latvian and Finnish regional universities' development policy;
- to conduct a survey in several Business Incubator companies in Latvian regions to assess their performance in line with the production of innovative and knowledge intensive products;
- to develop proposals for knowledge transfer promotion between academia and business.

There exist preconditions that Ventspils University College might introduce framework of entrepreneurial university model and increasing collaboration with industry, as well as commercialisation processes will facilitate such transition.

Keywords: entrepreneurial university, technology transfer, technology commercialisation, open innovation, commercialisation process and university-industry collaboration.

Introduction

Innovation is a driver of companies' competitiveness and is crucial to increase productivity and efficiency of production. The role of knowledge creators like universities is consistently growing and obtaining new forms of operation. Several authors have outlined that since 1990s university-industry partnership was guided by interaction with government in a systematic way to promote economic and social benefits and outputs for society.

Triple-Helix theory [1] emphasizes entrepreneurial university model and distinguishes several routes of knowledge and technology transfer. More detailed approach considers importance of knowledge flows in regional or national innovation systems [2] and EC [3]. In essence, the model of interaction has more complex mode. Sometimes the best way how universities may transfer their knowledge to industry and society is via soft or indirect channels, like publications, exhibitions, conferences, informal exchange or unpaid advices [4]. One study informed that MIT graduates have funded 4000 companies with annual revenues for USD 232 billion worldwide [5].

Non-linear approach to innovation processes requires more wide focus to understand clear role of both industry and university [2]. Kautonen (2000) [6] presents several categories of companies involved: customers, suppliers, competitors and partners.

As a result of substantial private and public investment in research activities it is important to manage existing interactions in a way to get maximised return back [7]. Sources of new knowledge might be classified as follows: research organisations; customers; other research driven firms; intermediates (here we classify also educational and training institutions, it could be better to name it as external expertise class); individual persons.

The variety of existing technology transfer channels, the main routes for commercial return - B2R&D, B2B, B2C, R&D2R&D we described in our previous work, where we identified main TT channels between R&D and industry. There is growing importance of intangible components of technology transfer process: role of formal and informal linkages as well as skills and abilities to transfer, imitate and copy is increasing [8].

Dalkir (2005) [9] proposes three main steps in knowledge transfer and management model:

1. knowledge assessment, sharing and dissemination;
2. knowledge understanding, acquisition and application;
3. knowledge capture and / or creation including adjustment or update of captured one.

The primary aim of this paper is to understand better processes of industry-university linkages and emerging concept of entrepreneurial university and systemizing them into proper model scheme to allow much easier and faster assess factors of effectiveness of any university on its way to introduce elements of entrepreneurial university. In the first part of this paper we will analyse the concept of academic entrepreneurship, the second part is devoted to entrepreneurship models, but third section analyses case of Ventspils University College.

Research Methods

The following methods were used: desk research, analysis of literature and statistical data (Ventspils University College, Investment and Development Agency of Latvia), interviews, aggregation, adaptation and expert evaluation. .

Results and Discussion

Entrepreneurial university

Entrepreneurial university is characterised by its three missions: education, research and benefits to society. Institutionally this means that besides traditional university structure serving

traditional education and research functions, an innovation support structures like liaison with industry is in place (see Fig.1.).

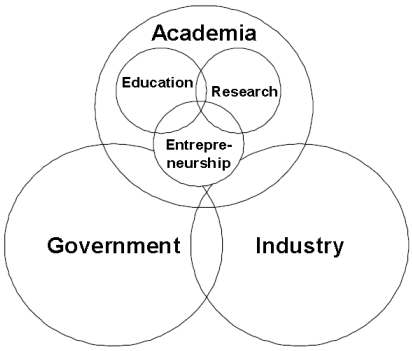


Figure 1. Core parts of entrepreneurial university in Triple Helix approach [10]

Preconditions of successful university with ability to transform towards entrepreneurship are strong will to attract foreign students and provide competitive educational and research services; available substantial financial assets, primarily in the form of land and buildings, to make investments and sustain independence; income from tuition fees stabilising university budget; university can attract industry financing for research projects employing PhD students and direct funding from state is comparable to world's leading universities [11].

Independence should be delegated also to department level. Instead of education sold to students by university or state, real academic partnership among teachers and qualified majority of students should be introduced where building of entrepreneurial spirit is merged with real research in institutes. Establishment of strong academic community should integrate willingness of alumni to contribute to their Alma Mater. This is a relatively undeveloped use of university's development potential in Europe and even more in Latvia [4, 11,].

The transformation of university's philosophy starts with the change of university-stakeholders relations and happens when a critical number of people agree to implement organised initiative how to change university within a medium term [11].

Creation of environment and entrepreneurial behaviour

Creation of environment for knowledge exploitation has dual character. Inside university the key determinant is university's intellectual property policy creating motivation among academics to think on spin-off companies and rules for university – industry interactions. Such policy also includes introduction of an entrepreneurial modules in the regular curriculum for university students and other related changes. External environment contains operations of

technological incubator, science park, pre-seed and seed fund. All university personnel should be engaged in the change of mindset and the optimisation of exploitation of university knowledge and technology. A relatively recent model of pre-incubation Reiner [12], Rajaniemi [13] Avotins [14] was introduced in universities. The nascent entrepreneurs obtain packed services from entity separated from and linked to the incubator in the same time, and can enter in incubator as new firm.

To stimulate entrepreneurial behaviour in the university community (undergraduate, graduate and PhD students, teachers, researchers, professional and administrative stuff) specialised training programmes for each of these groups have to be developed and implemented. A university could introduce in the academic curriculum of the bachelor, master and PhD study programmes very practical in a sense of business performing readiness, design of a company business plan, financial and export plan.

Teachers and researchers should (at least) be entrepreneurial with a working knowledge of entrepreneurship and clear understanding what can or cannot be achieved at their university. If they prefer to set-up new firm themselves, there should also be opportunity preferably in university to treat them as other nascent entrepreneurs (to test the technical and market feasibility of the company). The task of professional and administrative stuff is to support all three missions (teaching, research and entrepreneurship) at the university and this means, that they must also in reality, not in words, promote and encourage the entrepreneurial behaviour in the academic community [15].

Technology transfer managers serve as liaisons between two separate worlds – academics and entrepreneurs. We should keep in mind also firms and entrepreneurs to provide enough trust and appropriate culture to make collaboration motivated and encouraged [4, 15].

Many of university academics misunderstand the term “entrepreneurial university’ as simply research commercialisation, or reduction of academic freedom in education and research [4, 11]. The solution might be the offer to academic community of informative and training seminars about entrepreneurial university. The bottom-up policy approach to start transformations towards entrepreneurial university might be more sustainable compared to top down approach [11, 15].

A number of studies covered by Perkman show that quality of research in departments of university correlates to engagement with industry [16]. Incentive policy for academics to engage in entrepreneurship is extremely important and usually is known as “university intellectual property policy” setting spread of any commercial income from owned by university intellectual property among researcher, department and university.

The Case of Ventspils University College

Ventspils University College (VUC) was the first university seriously thinking to establish efficient incubation system [14]. In 2011 new pre-incubator was established as a separate facility. The Business Incubator serves for up to 60 companies in ICT, electronics, machinery and space areas; it has a branch incubator in Talsi city and it is a founder of Kurzeme incubator with incubator facilities in Liepaja, Kuldiga and Saldus. VUC has several joint projects with incubator and promotes new techniques for new business idea generation, design of training schemes for investor readiness and creation of linkages with risk capitalists.

In 2006 VUC was among the first universities in Latvia to establish a targeted Technology Transfer Office (more precisely, Technology Transfer Contact Point (TTCP)). Its objective is to support commercialisation of VUC IP potential, inventors, commercial contacts of researchers, industry collaborative activities, licensing, spin-offs, and to operate as direct channel of interactions between academics and industry. The main actual and forecasted outcomes of the VUC are illustrated at the Table 1.

Table 1. Actual and forecasted outcomes of the VUC

Metric	2007	2008	2009	2010	2011*
Commercial offers	10	14	12	15	15
New Patents	1	2	1	1	1
License negotiated/sold	0	0	0	0	0
Start-ups**	11	18	24	24	28
BI firms benefitting from VUC	5	5	5	5	7
Industrial agreements	24	8	8	11	15
Income generated from contract research and consultancies vienības?	4	8	5	5	2
Study courses with integrated entrepreneurial modules	8	9	9	11	11
Available entrepreneurial training courses	8	9	9	11	11
Industrial / normal PhD students	8	18	21	22	27

* - estimation

** - only university related start-ups were presented (established by students, graduates, alumni or teaching / research stuff

Additional capacity for further development of the University College lies in its teaching, research and administrative staff of high qualification and numerical balance. Any of these three parts of the staff is equally important for ensuring development of the University College and the rational use of available resources. University College itself must be a key promoter of targeted preparation of the staff necessary for its development, through its capacity and links with partners - other academic institutions, businesses, professional associations and other organizations.

The University College development has to be formed to promote continuing education and retraining opportunities for the people living in the Ventspils city and area, and all the country in accordance with university college areas of expertise, its technical capabilities, as well as the labour market in Europe. Furthermore University College has to be more actively engaged in the formation of the labour market (from the demand side) in Ventspils, mainly on the basis of raising the action volume of its research institutes and social activities.

The next main challenge for the University College is an active involvement in the process of city economy diversification in collaboration with Ventspils city council and businesses promoting the raise of production industry proportion in Ventspils. For this purpose University College must take care of training engineering professionals (initially in Electronics and electrical engineering fields) within its competence, together with other partners, including other educational and research institutions, on the basis of the educational institutions, located in Ventspils. Such orientation of the University College means much stronger focus on the technological aspects of all its activities, i.e. much greater focus on the issues of how to transform knowledge and skills into economic values.

Essential task of the University College is to take care of attracting qualitative and positively motivated students for getting basic university studies, and the later stages of education - Master's degree and PhD. There are annual series of events organized to introduce potential students to the University College, implemented fields of studies and related work-life specifics to help applicants to choose the profession and as far as possible to prevent them from studying unsuitable profession.

To achieve its goals VUC and its departments have to organize its activities so, that its upcoming development was based on this academic strategic operating framework, maintaining the university academic culture and the fundamental ethical principles, consolidated since the University College establishment:

- qualitative, based on analytical approach and understanding of appropriate methods and technologies, stimulating delivery of knowledge and skills;
- developing the flexible, easily modified teaching program to provide students with wider opportunities on the labour market offering wider specialization;
- development of the new educational programs keeping in mind principle of logical and gradual succession, using available premises, informational and technical support and academic stuff;

- increasing and educating Academic staff through the master's, PhD and internship opportunities in Ventspils University College, as well as in other Latvian and foreign universities with an established reputation and tradition in the corresponding field of science;

Providing paid education services according to the city and regional demand including providing life-long learning programs and consultancy services.

Science and practice based education, intellectual property, orientation on innovative economy and competitiveness on labour market are the values on which the work of University College is based and will be regarded as its ideological motives. Creating a VUC image it is essential to show Ventspils as a place with high growth in different fields and where production industry is developing lately. Consequently, the Ventspils University College should be presented as a part of dynamic city with a special environment where on the basis of cooperation with the city, businesses and government agencies and support structures - Ventspils High Technology Park, Business Incubators, Technology Transfer Centre of Kurzeme, Life-long learning Department, etc. creating empowering the development of creative personalities - students, lecturers, researchers and other groups, which is a necessary precondition for economic recovery and the balanced functioning, as well as ensuring state and local government functions.

If to base strategic decisions on the planned amounts of national and EU structural fund resources, universities cannot foresee any increase in new knowledge creation. The VUC Engineering Research Institute VSRC strong growth case is outstanding and rather exception if we take into account its ability to keep the line of ambitious aims and vision reached within last two – three years. The EU requirements to increase public and private funding for research is far away in Latvia and it is not clear when the existing decrease trend might stop and turn in increase.

The most effective way to analyse framework factors of entrepreneurial university to the VUC case study is to describe each factor and map the available indicators against factors as shown in Table 2 below.

Table 2. Application of entrepreneurial university framework factors to VUC case

Framework factor	Indicator	VUC application
Supportive administrative and strategy framework	Approved policy and set activities for implementation	VUC policy don't set establishment of entrepreneurial university as a priority. So far, without such policy several entrepreneurial activities were developed as isolated actions like pre-incubator type training projects "businessman in 5 days", venture cup, new idea generation methodology etc.
	Supportive decision-making level	New management team potentially would introduce changes but so far none of administration was respeonsible
	Team supporting changes	Very moderate
Advanced Research base	Excellence centres and infrastructure	planned
	Motivated to entrepreneurship researchers	Moderate changes
	Purchase of applied results developed in university	Slowly increasing in ERI
Financial assets	Real estate and buildings	Belong to city real estate company
	Investment in spin-offs traditions	none
Advanced innovation support infrastructure	Innovation support infrastructure	Pre- and BI
	Innovation system in place	Foreseen, but slow development, good collaboration with city and industry
	IPR support and transfer system	Formally approved
Entrepreneurial and innovation culture	Entrepreneurial spirit in teaching, research and societal return	low
	Collaborative to industry culture	changing
	Active entrepreneurial alumni community	Not developed
	Joint supervision by industrial researchers of master and PhD thesis	Not exist

There are little measuring systems developed of entrepreneurial universities. Some works outline indicator systems based on triple helix approach [17]. Tijssen has designed measurement model based on three stage product life cycle evaluation: science driven research, product oriented R&D services and market driven R&D activities up to contract with industry [18]. We have based our approach on measuring the main influencing operations of entrepreneurial university factors.

Conclusions

1. This paper is a first one from three in series investigating technology transfer was devoted to introduce and discuss concept of entrepreneurial university and analyse readiness of VUC to transfer to such format. Selected models of entrepreneurial university were discussed as a result of synthesis of literature on the researched subject.
2. Framework factors to describe entrepreneurial university were designed and applied to case of VUC analysis. This experience might lead to understanding of entrepreneurial university and used further to assess core processes of transformation of traditional

teaching school model to new one. It has become apparent that more social and economic value might be achieved from commercialisation and transfer of available in university knowledge by creating model of entrepreneurial university.

3. University networks could drive further value by applying entrepreneurial focused research, integrate open science. Whilst this paper examines university within the context of becoming entrepreneurial and existing technology transfer channels, there exist opportunities that universities could generate additional value from their knowledge networks as the role of universities is increasing in national and regional innovation systems. It is also important to further study open innovation knowledge transfer processes balanced with protected technology transfer processes based on university generated innovation ecosystem.

References

1. Etzkowitz H., Leydesdorff L. (2000) The Dynamics of Innovation: From National Systems and „Mode 2" to a Triple Helix of University-Industry-Government Relations, Research Policy 29 (2): 109-123.
2. Etzkowitz H., Leydesdorff L. (2001) Universities and the global knowledge economy. Continuum, London, 2001, p.13.
3. EC (2001) Building an innovative economy in Europe, a Review of 12 studies of innovation policy and practice in Today's Europe. EC, 2001, p.62.
4. Philpott K., Dooley L., O'Reilly C., Lupton G. The entrepreneurial university: examining the underlying academic tensions. Technovation, 31, 2011, 161-170.
5. BankBoston 1997, MIT: The impact of innovation. Bank Boston Economics Department Special Report, Boston MA, USA.
6. Kautonen M., Tiainen M. (2000) Trajectories, Innovation Networks and Location. A Comparative Study of Two Regions in Finland. DRUID Winter Conference on Industrial Dynamics, Copenhagen, Denmark.
7. Barnes T., Pashby I., Gibbons A. Effective university-industry interaction: a multi-case evaluation of collaborative R&D projects. European Management Journal, 2002, vol.20, No.3, pp.272-285.
8. Jarohnovich N., Avotiņš V. Assessment of technology transfer and diffusion models in Latvia. J. of Business Management, 2009, No.2, pp.31-41.
9. Dalkir K. (2005) Knowledge management in theory and practice. Elsevier Butterworth-Heinemann publications.
10. Mets, T. (2009). Creating business model for commercialization of university research. Management of Organizations: Systematic Research, 51, 83-94.
11. The KTH Entrepreneurial faculty Project. VINNOVA Report VR 2005:13, Stockholm, 2005, 128 p.
12. Reiner R., Sievers U. Pre-incubation: new concepts to support start-up activities of universities and research institutes. PP.97-108. Broadfoot Ch., Sheen M. Towards best practice in (pre-)incubation. PP.77-84. and Steffens J., Traude A. The Bielefeld concept of pre-incubation. In: New concepts for academic entrepreneurship. Proceedings of the USE-it! Conference, Editors Van der Sijde P., Wirsing B., Ridder A. 2002, Twente University Press, Enschede, The Netherlands, 179 p.
13. Rajaniemi L., Niinikoski E.R., Kokko E. Pre-incubation in higher education. Examples of pre-incubation and some critical conditions to be taken into account in order to establish pre-incubation activities
14. Avotiņš V., Zeps V. Critical conditions to establish efficient incubation cycle in Latvia. Book of abstracts of the XXI ISPIM Conference, Bilbao, Spain, 6-9 June, 2010. ISBN 978-952-214-925-1. Paper published in: Proceedings of The XXI ISPIM Conference, Huizingh K.R.E., Conn S., Torkkeli M.& Bitran I. (Eds.), 2010, Wiley Higher Education, on-CD, ISBN 978-952-214-926-8. www.ispim.org.
15. Siegel D.S., Waldman D.A., Atwater L.E., Link A.N. Commercial knowledge transferts from universities to firms: improving the effectiveness of university-industry collaboration. Journal of High Technology Management Research 14 (2003) 111-133.

16. Perkmann M., King Z., Pavelin S. Engaging excellence? Effects of faculty quality on university engagement with industry. Research Policy, 40 (2011) 539-552.
17. Leydesdorff L., Meyer M. Triple helix indicators of knowledge-based innovation systems. Introduction to the special issue. Research Policy, 35 (2006) 1441-1449.
18. Tijssen R.J.W. Universities and industrially relevant science: towards measurement models and indicators of entrepreneurial orientation. Research Policy 35 (2006) 1569-1585.

JELGAVAS NOVADA ILGTSPĒJĪGA ATTĪSTĪBA NOVADA PĀRVALŽU PĀRSTĀVJU SKATĪJUMĀ

THE SUSTAINABLE DEVELOPMENT OF THE JELGAVA LOCAL MUNICIPALITY FROM THE POINT OF VIEW OF MUNICIPALITY REPRESENTATIVES

Laima Barisa, Mg.sc.soc.
Latvian University of Agriculture, Faculty of Social Sciences,
Liela street 2, Jelgava
Laima.Barisa@llu.lv

Abstract. The concept of sustainability has been widely discussed and variously defined.
It is explained usually by three ‘’pillars” of development: environmental, economical and social. The essential amendment in understanding of suistanable development is given by Australian researchers Yencken and Wilkinson, who distinguish four ‘’pillars”: (1) biophysical sistems, ensuaring the process of life of all living, encluding human beings, (2) economical systems, providing recurses for life, (3) sosial systems, ensuaring publicē life tooted in peace and equility, (4) political systems, based on honnest and democratic decision making to coordinate activities of 3 systems mentioned above. Thees four “pillars” are actually for sustainable development in all territories, including local areas - rural regions, smaller towns and cities.
There are different chellenges for the public administration sector of different level. Jelgava Local Municipality is involved in Baltic Sea Region programm’s 2007 – 2013 project “Trans in Form”. The aim of project is to introduce competitive development concepts for rural regions, smaller towns and cities. It will raise awareness among both policy makers and citizens about regional attractiveness and potential. Project includes research component – discussion of focus group ‘’New stories and messages on Jelgava Local Municipality”, where participated representatives of the local administration and told their visions of sustainable develepment in near and long term. The article reflects main results and conclusions from this discussion.
Key words: sustainable development, Jelgava Local Municipality, focusgroup discussion

Ievads

Ilgtspējīgas attīstības jēdziens pirmo reizi publiskās politikas dokumentos tika definēts ANO Pasaules Vides un attīstības komisijas ziņojumā “Mūsu kopējā nākotne” 1987.gadā un starptautiski plaši tiek lietots kopš 1992.gada ANO konferences Riodežaneiro **“**Vide un attīstība”**.** Ilgtspējīga attīstība tiek skaidrota kā *“attīstība, kas nodrošina šodienas vajadzību apmierināšanu, neradot draudus nākamo paaudžu vajadzību apmierināšanai”*. Latvijas Ilgtspējīgas attīstības pamatnostādnes tika izstrādātas un apstiprinātas Ministru kabinetā 2002. gadā, kad Latvija vēl nebija ES dalībvalsts. (Ilgtspējīga attīstība, Skat.internetā 06.06.2011.)

Ja sākotnēji ilgtspējīgas attīstības jēdzienā tika akcentēta dabiskās vides saglabāšana, tad šobrīd tas tiek skatīts plašāk, ietverot arī publiskās politikas un menedžmenta kontekstu. Austrāliešu pētnieki Jenkens un Vilkinsons ir izveidojuši (Yencken D., Wilkinson D., 2000) ilgtspējības modeli, kura pamatā ir četri *pīlāri*:

1) biofizikālās sistēmas (vide), kas nodrošina visu dzīvu būtņu, arī cilvēka dzīvības procesus;
2) ekonomiskās sistēmas, kas nodrošina dzīvei nepieciešamos resursus (darbs un nauda);

3) sociālās sistēmas, kas nodrošina mierīgu un vienlīdzībā sakņotu cilvēku kopdzīvi, kur tiek ievērotas cilvēktiesības un cilvēciskās cieņas pilnas attiecības;

4) politiskās sistēmas, kas godīgi un demokrātiski pieņem lēmumus, lai saskaņotu iepriekšējo 3 sistēmu darbību. (Benn S., Dunphy D...., Skat. internetā 02.06.2011.)

Lielāko problēmu autori saskata vides, ekonomiskās attīstības un sociālās sistēmas savstarpējā līdzsvara izjaukšanā. Piemēram, bieži izskan atziņa, ka bizness parasti (*business as usual*) noved pie dabiskās un sociālās vides degradācijas, tāpēc jāveicina *zaļās* ekonomikas un sociāli atbildīgas uzņēmējdarbības attīstība. Pie tam, postindustriālajā sabiedrībā paralēli notiek globalizācijas un individualizācijas procesi, problēmas ir kompleksas un tajās iesaistīti ļoti daudzi ieinteresētie subjekti. Veidojas t.s. risku sabiedrība (Beck U., 1992), jo pastāv grūti paredzamie finanšu, sociālie, ekoloģiskie u.c. riski. Līdz ar to šādas sabiedrības vadībai parādās īpaši izaicinājumi: tā sāk izpausties kā minēto risku vadība un sabalansētības uzturēšana, kas liek meklēt ne vien jaunus risinājumus, bet arī jaunus lēmumu pieņemšanas veidus. Birokrātiskā sistēmā noslēgtā lēmumu pieņemšanas kārtība vairs nav ne efektīva, ne arī sabiedrības akceptēta. Politikas veidošanai ir jākļūst vairāk publiskai, - ārpus parlamentu un izpildvaras kabinetu sienām par tās arēnu jākļūst elastīgiem steikholderu (ietekmes aģentu) tīkliem ap identificētajām riska zonām. Taču tad sava jaunā loma jāapzinās oficiālajām politiski administratīvajām struktūrām- tās vairāk ir kā katalizatori lēmumu pieņemšanā un problēmu risināšanas moderatori, nevis vienīgie lēmēji.

Latvijā ilgtspējīgas attīstības problēmas izpaužas arī kā sociālekonomiskās atšķirības starp reģioniem un arī atsevišķu reģionu ietvaros, – dabas un kultūrvides nianses, atšķirības tradīcijās un ekonomiskajā aktivitātē, iedzīvotāju ienākumos. Reģionu attīstība ir nelīdzsvarota, netiek izmantotas vietējās priekšrocības. Latvijas sabiedrības sociālais, ekonomiskais un politiskais neviendabīgums, pat sašķeltība apgrūtina sabiedrības integrāciju. Papildus objektīvajām ekonomiskajām problēmām liela nozīme ir tam, ka sabiedrības daļai trūkst pašapziņas, uzņēmības, ticības sev un valstij, cilvēki jūtas bezpalīdzīgi un nespējīgi mainīt savu dzīvi, piemērojot to jaunajiem apstākļiem. Kā minēts Latvijas ilgtspējīgas attīstības stratēģijā, 2030. gadā Latvijā būs sabiedrība, kas patērē atbildīgi, ir radoša, atvērta, gatava sadarboties, draudzīga pret ikvienu, īpaši labvēlīga pret bērniem un vecākiem cilvēkiem. Latvijā būs izteikti „zaļa", inovatīva, uz radošiem mazajiem un vidējiem uzņēmumiem balstīta ekonomika un pārvaldība, kura spēs ātri reaģēt uz pārmaiņām un kuru uztvers kā savējo gan nelielu pilsētiņu iedzīvotāji, gan tie, kas konkurē globālā mērogā. (Latvijas ilgtspējīgas attīstības stratēģija līdz 2030.gadam, Skat internetā 06.05.2011.)

Lai sasniegtu šo vīziju, ikviena Latvijas teritorijas pārvalde domā, kā to īstenot. Sava specifika šajā procesā ir pilsētām, bet īpaši uzdevumi jāveic novadiem ar lauku teritorijām. Līdzās

novadu pašvaldību pašiniciatīvai šajā virzienā ir iespējams izmantot arī dažādu projektu ietvaros piedāvātās aktivitātes.

Viens no šādiem projektiem ir Baltijas jūras reģiona programmas *2007 - 2013* projekts **Trans in Form** (Lauku reģionu transformēšana, veidojot jaunus attīstības scenārijus, vēstījumus un pievilcīgu vides dizainu), kura **mērķis** ir *veicināt mazo un vidējo pašvaldību konkurētspēju un ilgtspējīgu attīstību, veidojot tās pievilcīgākas dzīvošanai, darbam, investīcijām.*

Projektā ir iesaistījies arī Jelgavas novads, kuru veido 13 pagasta pārvaldes: Eleja, Glūda, Jaunsvirlauka, Kalnciems, Lielplatone, Līvbērze, Platone, Sesava, Svēte, Valgunde, Vilce, Vircava un Zaļenieki. Atsevišķu pagasta pārvalžu teritorijā vēl iekļaujas tādas apdzīvotas vietas kā Jēkabnieki, Bērvircava, Mežciems, Lielvircava, Zemgale, Vītoliņi, Tīreļi.

Minētā projekta ietvaros 2011. gada 16.februārī notika viena no projekta aktivitātēm - **fokusa grupas diskusija** - **Jauni stāsti un vēstījumi par Jelgavas novadu.** Tematiskās sarunas gaitā bija iespējams apzināt vērtīgo, kas jau šobrīd ir katrā novada apdzīvotajā vietā (lielā mērā saistībā ar D. Jenkena un D. Vilkinsones norādītajiem četriem ilgtspējīgas attīstības pīlāriem – vidi, ekonomiku, sociālo dzīvi un zināmā mērā arī politisko sistēmu, kuras ietvaros var realizēt ilgtspējīgas attīstības uzdevumus), kā arī pasapņot par to, ko varētu mainīt vai attīstīt katrā teritorijā, un padomāt arī, kā to veikt.

Fokusgrupas diskusija, kurā piedalījās Jelgavas novada pagastu pārvalžu vadītāji un deputāti, notika Jelgavas novada domes telpās, to vadīja raksta autore.

Pētījuma rezultāti

Saistībā ar vēstījumiem par novada šodienu un nākotni, fokusgrupas dalībnieki tika aicināti pastāstīt, **ar ko viņi lepojas savā pārstāvētajā teritorijā (*pagastā, ciemā*) un novadā kopumā** (atkarībā no tā, ko katrs no fokusgrupas dalībniekiem pārstāvēja).

Kā būtiskāko, ar ko viņi lepojas, diskusijas dalībnieki minēja

- dažādus **vēsturiskos un dabas objektus**, ko labprāt varētu izrādīt citu pagastu iedzīvotājiem – muižas, pilis, atceres vietas, īpašus kokus, specifiskas dabas ainavas**,**
- **sava novada cilvēkus** – gan vēsturiskas personības, gan tos, kas šobrīd dzīvo un strādā novadā,
- **zemkopību** kā novada galveno nodarbošanās virzienu,
- **kultūru, izglītību, sportu.**

Attiecībā uz **vēsturiskajiem objektiem** minēts, ka *„Jelgavas novads ir bagāts ar ļoti daudzām muižām un pilīm''*, nosaukti tādi objekti kā – Vilces muiža, Jaunsvirlaukas muiža, Zaļenieku

baznīca ar ērģelēm, senkapi, Zaļenieku pils, kurā atrodas arodskola, Ložmetējkalns, kurā notika Ziemassvētku kaujas, Staļģenes pils, kurā šobrīd atrodas pirmsskola, Holandes tipa dzirnavas Platonē, Blankenfeldes muiža, Skursteņmuiža, Vidusmuiža, Galamuiža, Aspazijas dzimtās mājas Daukšas , u.c.:

"…Lielplatones pils, kur ir saglabājusies ne tikai muiža, bet arī muižas ēkas - klētis, staļļi utt., kas nav daudz kur Latvijā."

„....mēs domājam ... tuvākajos gados izveidot ... piemiņas vietu represētajiem. ...no Bauskas uz Eleju gāja šaursliežu vilciens, tieši no šīs stacijas laukuma tika izvesti šie cilvēki. Tur mēs ... gribētu ar laiku veidot kādu monumentu vai kādu lielāku piemiņas plāksni, kur sapulcēties un nolikt ziedus..."

Runājot par vēsturiskajiem objektiem, sarunas dalībnieki uzsvēra arī, ka līdzās sakārtotām ēkām ir vēl arī virkne, kas prasa restaurāciju *:...tur jāiegulda ļoti daudz naudas, lai varētu radīt tūristu apskates objektus. Varētu ... maršrutu izveidot pa visu novada muižu teritoriju."*

No **dabas objektiem** minēti Vilces dabas parks, Zaķu pļava, Platones osis, kas vienu brīdi bijis lielākais osis Latvijā, tagad, pēc pēdējiem datiem - otrais lielākais, Platones upe ar saviem septiņiem tiltiem, Sidrabes upe ar četriem tiltiem, tipiskā Zemgales ainava, Lielupe, ūdeņi vispār.

"…varam lepoties tieši ar Zemgales līdzenumu. Sevišķi, ja iebrauc no Latgales cilvēki, tad tas plašums viņus pārsteidz…"

"…mums ir arī daudz upju, un rāmi plūstošā Lielupe dod sava veida noskaņu jeb ieskaņu par to, kāds ir Jelgavas novads…"

Gandrīz katrs no diskusijas dalībniekiem uzsvēra, ka **lepojas ar sava novada cilvēkiem**, vispirms jau ar tiem, kas šobrīd novadā dzīvo un strādā: *„...Jelgavas novads varētu lepoties ar te dzīvojošiem cilvēkiem…"*,

Tomēr netiek aizmirstas arī novada vēsturiskās personības – Jēkabs Duburs, Arvīds Miervaldis Spertāls, Ģederts Eliass, Pēteris Lūcis, Mārtiņš Zīverts, Jānis Linters, u.c.

Īpaši visi runātāji uzsvēra novada specifiku - piemērotos apstākļus **zemkopībai** un arī novada iedzīvotāju panākumus šajā jomā. Ja ar ko īpaši var lepoties Jelgavas novadā, ‘’*...tā ir zemkopība ar augstām ražām, ar labiem laukiem, ar augstām zemes ballēm, viena no labākajām zemēm laikam Latvijas teritorijā."*

"…novads ir kā maizes klēts. Mūsu zemnieki māk strādāt, apsaimniekot zemes, pārējie var pamācīties, pat no ārzemēm mācās."

Līdzās zemkopībai nozarei, ar ko novads var lepoties, ir arī piensaimniecība un tāds netradicionāls saimniekošanas veids kā *briežaudzētavas.*

Protams, bez visa iepriekš minētā ir arī daudz citu būtisku sava novada lepnuma avotu, ko minēja fokusgrupas dalībnieki. Tie attiecas gan uz **kultūru,** gan **izglītību** un **sportu**. Tiek minētas gan kultūras iestādes - kultūras un tautas nami, gan tradicionāli pasākumi. Īpašas ir skolas, kurās

līdzās mācību procesam notiek arī kultūras un sporta pasākumi, ko sekmē salīdzinoši labais nodrošinājums ar sporta zālēm.

''… mums ir skaistas mācību iestādes, sākot ar bērnudārzu, beidzot ar arodvidusskolu…"

Vircavā *"… ir pirmsākumi amatieru teātra festivālam "Bīne".*

"…mēs esam lepni par to, ka esam saglabājuši jaunsardzes kustību, tas nozīmē, ka mēs audzinām arī jaunos šīs zemes īstus Latvijas patriotus. "

''Pirmkārt, sportisti, treneri, un lielākais, ar ko mēs varam lepoties - domāju, vienīgais novads republikā – ar mūsu sporta zālēm, kuras veiksmīgi sākām 1994.gadā būvēt un ..tagad pa visu novadu, … 99% pie skolām pagastos sporta zāles ir sakārtotas…!"'

"Tradicionālie sporta veidi, kas novadā ir bijuši un ir, tā ir brīvā cīņa, tas ir volejbols, tā ir vieglatlētika, tautas sporta veids - orientēšanās, meiteņu futbols, jauns topošais sporta veids – florbols, esam arī gatavi uzņemt gan ārzemniekus, gan blakus pagastus un pārvaldes…"

Sarunas turpinājumā fokusgrupas dalībnieki tika aicināti izteikties, ko viņi **stāstītu par savu novadu svešiniekam, tūristam un iespējamam biznesa partnerim,** ņemot vērā tādus aspektus kā vide (*ainava, dabas resursi utml*.), ekonomika, sociālie aspekti un pārvaldība.

No atbildēm izkristalizējas atziņa, ka, runājot par šiem aspektiem, katrs diskusijas dalībnieks vairāk uzsvēra sev būtiskāko un aktuālāko. Gan tūrismam, gan biznesam ir svarīgi visi aspekti – gan tie, kas saistās ar dabas vidi, ekonomikas attīstības vidi, gan tie, kas attiecas uz sociālo un pārvaldības sfēru.

Visi centās parādīt priekšrocības, kas ir viņu pārvaldes teritorijā. Attiecībā uz to, ko par novadu teiktu **svešiniekam vai tūristam,** daudzi minēja, ka tas būtu tas pats, ar ko viņi lepojas. Tomēr sarunas gaitā tika uzvērts novada izdevīgais ģeogrāfiskais stāvoklis, kas ir būtiski gan tūrismam, gan biznesam, un nosaukti arī vēl iepriekš neminēti objekti:

„...mēs atklājām pagastā Amatniecības centru, kas nākotnē varētu piesaistīt tūristus…"

"Lielupi var izmantot, pagājušajā vasarā tika atklāta uzlabota peldvieta, kur, neskatoties uz to, ka šī atklāšana notika vasaras vidū, līdz vēlam rudenim to izmantoja gan tūristi, gan atpūtnieki, peldēties gribētāji."

"…te … nepieminēja vienu tādu labu lietu, ka mēs tās savas sporta zāles vasarā varētu izmantot…Piemēram, vienu gadu, kad vajadzēja, mēs 100 riteņbraucējus … pabarojām, sporta zālē izguldinājām …."

Potenciālajam tūristam tiktu stāstīts par visu, kas viņam būtu vajadzīgs - ieteiktu ievērojamākos apskates objektus, atpūtas vietas - īpaši pie ūdenstilpnēm, kur var gan peldēties, gan braukt ar kādu ūdens transporta līdzekli, gan makšķerēt, arī naktsmītnes, ēdināšanas iestades, arī par iespējām novietot personīgās automašīnas.

"… ko es teiktu svešiniekam, biznesa partnerim un tūristam, ir tas, ka man ir liels prieks, ka viņš ir ieradies Latvijas labākajā novadā, un mēs arī ar to varam lepoties."

„....Meži, medības, un svaigs gaiss…"

Diskutētāju teiktajā parādījās arī doma, ka pēc būtības tūrisma sfēra jau arī ir iespēja veidot biznesu – gan tādu, kas vistiešākajā veidā saistās ar kāda objekta (vēsturiska vai dabas) sakārtošanu vai radīšanu - tika minētas jaunu atpūtas vietu, tūrisma taku veidošana, skatu torņu celtniecība (īpaši – vietās pie ūdeņiem, kur var vērot ainavu, putnus), gan naktsmītņu iekārtošanu (arī telšu vietas) utml.

„Ložmetējkalnā …varētu veidot vismaz veselas dienas aktīvu maršrutu - nevis tikai aizbraukt paskatīties, bet gan pašiem iet, darīt un nodarboties ar tūrismu gan ar kājām ejot, gan ar mašīnu braucot, gan velosipēdu braucot … Otrā dienā aizbraukt uz pareizticīgo sieviešu klosteri…"

„...kur Svēte ietek Lielupē, tur varētu uztaisīt perfektu dabas taku ar putnu vērošanas torņiem…"

Novērtējot esošo situāciju tūrisma sakarā, sarunas dalībniekiem radās arī idejas, kā pilnveidot tūristu piesaisti – radās doma par novada kopīga tūrisma bukleta izveidi, lai jebkurā novada pagastā būtu informācija par visu novadu, ko nepieciešamības gadījumā varētu izmantot: *"…ir jātaisa viens kopīgs buklets pa visu novadu…"*

Konkretizējot, kas saistās ar **iespējamo biznesa partneru**/potenciālo uzņēmēju ieinteresēsanu, fokusgrupas dalībnieki minēja, ka, pirmkārt, jau pastāstītu par to, kas katrā pagastā un novadā kopumā ir šobrīd. Tika nosaukti esošie uzņēmumi (ar lauksaimniecību saistītie, rūpnieciskās ražošanas uzņēmumi, piemēram, ceļu būvniecības sabiedrība Igate, mēbeļu ražotne, logu un durvju ražotne, konservu cehs, ir kokapstrāde un metālapstrāde, veikali, u.c.)

Otrkārt, ikvienu uzņēmēju noteikti interesē konkrētā vide, kurā viņš gribētu veidot savu biznesu, tāpēc tika vērsta uzmanība arī uz to: *"…par biznesu - katrā ziņā nevar nepievērst investoru uzmanību, ka mums ir ļoti, ļoti izdevīga ģeogrāfija, republikas vai valsts vidiene, Rīgas tuvums, … ir attīstīta infrastruktūra - ūdens, dzelzceļi, autoceļi, … pagastos ir attīstīta … infrastruktūra ar to, ka saglabātas skolas, top atpūtas iestādes, kultūras iestādes, cilvēkiem ko darīt būtu..."*

Vēl kā novada priekšrocība biznesa attīstībai tika minēts, *"… ka mums ir vairāki pagasti, kur ir dabas gāze, kas ir svarīgs uzņēmējiem, …mums ir šie termālie ūdeņi, pie kuru izpētes mums vēl jāpiestrādā..., mums ir lauksaimniecības zemes, ... ko noteikti vajadzētu izmantot koģenerācijai..."*

"…pie Kalnciema Lielupe ir arī kuģojama, līdz ar to tie ir … resursi, ko mums noteikti vajadzētu izmantot. "

Protams, novads nav gluži viendabīgs, ir teritorijas, kuras vairāk piemērotas tradicionālajai lauksaimniecībai (Vilce, Zaļenieki, Platone, uc.), bet citviet (Valgunde, Kalnciems, Līvbērze, Glūda) var attīstīt netradicionālākus uzņēmējdarbības virzienus, rūpniecisko ražošanu.

Kāds no fokusgrupas dalībniekiem izsacījās: *" attiecībā par biznesu, noteikti gribētos redzēt tādus piedāvājamus, kas saistās ar intensīvu rūpniecību - metalurģiju, mašīnbūvi, ķīmisko rūpniecību, noteikti arī gribētu redzēt tādus biznesa partnerus, kas var pārstāvēt lauksaimniecisko produkciju. "*

Tika minēts , ka *"mums…būtībā ir arī brīvas telpas, kur veidot kādus ražošanas objektus, … viņi pieder īpašniekiem, kuri pašreiz neko nedara''*, varētu vienoties par šo telpu izmantošanu.

Tomēr labāk,*" lai objekts vai zeme būtu pašvaldības, …kur viņš* (uzņēmējs) *varētu sadarboties tieši ar pašvaldību , nevis no kāda nomāt vai kaut ko pārpirkt."*

Ja to var piedāvāt interesentam, pagastu pārstāvji labprāt viņu par to informētu.

Bez šaubām, ka iespējamam biznesa partnerim ir svarīga arī sociālā sfēra novadā, sevišķi, ja viņš domā ne tikai par uzņēmējdarbību, bet arī par dzīvi tajā, tāpēc būtiski, *"…lai ir sociālā sfēra sakārtota, lai ir skolas, lai ir slimnīcas, veselības centri vai vismaz medpunkts…., lai ir darbaspēks, ko varētu arī savā struktūrā nodarbināt, lai ar viņu nav problēmas, lai viņš nav jāvadā no kaut kurienes…."*

"… pie sociālajiem aspektiem jāsaka, ka ir skolas, bērnudārzi, ģimenes ārsti, tautas nami, kultūras nami, dienas centri, bibliotēkas...tā ir tā joma, kur jebkurš cilvēks, kas ieinteresēts gan biznesā, gan lai pārceltos uz dzīvi..- mums ir, ko piedāvāt....."

Interesants ierosinājums tika izteikts saistībā ar sportu: *"…divas trīs normālas komandas novadā ir, caur kurām, ja vajag, varētu reklamēt sevi, ja ir tāda interese. Tā sportā ir, mēs biznesam varam palīdzēt."* Tas ir svarīgs aspekts, kas saistās ar konkrēta biznesa reklāmas iespējām.

"…no pašvaldības puses varētu …piedāvāt … dažādu informatīvo atbalstu…."

"…vēl par pārvaldību. Es palieku pie tās domas, ka mums jāattīsta ir policijas atbalsta punkti, lai kaut kādās ārkārtas situācijās nevajadzētu braukt no Jelgavas, bet Elejā būtu savs punkts, Kalnciemā savs atbalsta punkts, kur visas darbības varētu notikt…."

Fokusgrupas dalībniekiem tika lūgts akcentēt, **ar ko,** viņuprāt, **Jelgavas novada iedzīvotāji atšķiras no citiem (*raksturīgais, tipiskais*) un kas novadā noturētu/piesaistītu jauniešus.**

Sarunas dalībnieki, raksturojot novada iedzīvotājus vispār, uzsvēra, ka nez vai ir kādas īpašas pazīmes, kas viņus atšķir no citu Latvijas novadu iedzīvotājiem, tomēr iezīmē īpašības, kas tipiskas novada cilvēkiem, sakot, ka ir ļoti daudz čaklu, strādīgu, darbīgu un atvērtu cilvēku: *„...pamatā liela daļa cilvēki ir piesaistīti zemes lietām, kārtīgi cīnās, par spīti visādām dabas katastrofām..., strādā un dara daudz..."*

"… te jau arī izskanēja tas, ka iedzīvotāji ir arī zinātkāri. ...gan bērni, gan jaunieši grib mācīties, grib kaut ko uzzināt…"

Vēl viens aspekts Jelgavas novada iedzīvotāju raksturojumā: *"… par zemgalieti runājot, mūsu Jelgavas novada iedzīvotāji, pārskatot visu teritoriju, … – tomēr ir šī **viensēta**, par cik … lauksaimniecība tomēr dominē. Ir viensēta, tā sava saimniecība, naturālā saimniecība vai tas ir kaut kas lielāks, te jau arī viss izriet no tā, kas šeit ir tradīcijas … ģimenē, cik … jaunā paaudze pārņem tās saistības vai tomēr viņa aiziet projām…"*

Tika arī teikts, ka *"ja paskatās katra pagasta griezumā, noteikti mēs katrs pagasts esam atšķirīgi - sākot jau ar mentalitāti un beidzot ar to pašu humora uztveri…."*

Vairāki runātaji uzsvēra, ka novadā iezīmējas tendence, ka kopumā tomēr, raugoties pēc vecuma struktūras, novada lielākais skaits ir vidējās un vecākās paaudzes cilvēku un, diemžēl

jauniešu kļūst arvien mazāk. Tāpēc vēl jo aktuālāks ir jautājums, kas novadā tiek darīts un ko vēl var darīt, lai jaunieši neaizplūstu prom un aktīvi iesaistītos novada dzīvē.

Piemēram, *"Jaunsvirlaukā jau vairākus gadus ir labas tradīcijas attiecībā uz jauniešiem, … ir jauniešu klubs, kuru paši jaunieši vada un organizē, piedalās dažādos projektos."*

Sarunā atzīmēts arī tas, ka ne tikai Jelgavas novadā, bet jebkurā citā Latvijas novadā iedzīvotāji dalās divās daļās – *"…vieni ir tie, kas dara un visur piedalās un lien iekšā un urķējas, un otri ir tie, kas stāv malā, un kurus arī grūti iekustināt. Un tieši tas pats attiecas arī uz jauniešiem."*

Lai jaunieši labprāt paliktu novadā, kā galvenais priekšnoteikums minēts darba vietu nodrosināšana, iespēja iegūt dzīvojamo platību, pieejams bērnudārzs, skola, veselības aprūpe, tāpat jāļauj viņiem pašiem vairāk uzņemties iniciatīvu, darīt to, kas tieši viņiem ir nozīmīgs, nevis vienmēr teikt priekšā vai pat likt kaut ko darīt: *"Jādomā par ražošanu, par darba vietām, galvenais, kas mums trūkst. Ja būs darba vietas, būs jaunatne, būs viss."*

Tāpat jauniešu noturēšanā un piesaistē svarīga ir kultūras dzīve – iespēja gan apmeklēt kultūras pasākumus, gan pašiem piedalīties pašdarbībā: *"… tur ir vajadzīgs kultūras nams, sporta zāles, bērnudārzi, internets, ceļš un tie pulciņi, ko mēs piedāvājam, dzīvoklis…"*

Daudz kas jau tiek darīts, lai risinātu jauniešu piesaistes jautājumu: *„Sākam veidot jauniešu centrus, mēģinām viņus iesaistīt sabiedriskajos darbos, mēģinām iesaistīt talkās …,...dažādu …kolektīvu veidošanā, mums pat šogad budžetā ir ielikta tāda štata vienība kā jauniešu koordinators, Tas ir ļoti labi, mums jādabū tādu cilvēku, kas tiešām ar to jaunieti nodarbojas, ka viņš iesaista viņus visādos pasākumos, lai viņam nav jāsēž pie televizora ..."*

Kopumā, runājot par jauniešiem novadā, visu fokusgrupas dalībnieku viedoklis izteikts šādi: *"… pasaulē, kad mums ir Eiropa vaļā, visas durvis vaļā, informācijas pārbagātība, …vienkārši ir jāstrādā ar saviem bērniem, ar mūsu jauniešiem, jāsniedz informācija, kā pareizi izvēlēties to vidi, kurā vajadzētu dzīvot, apstākļus, kuros vajadzētu atrasties, Un …, ka pats svarīgākais ir radīt … mājas sajūtu, lai … bērni gribētu atgriezties pie vecākiem, gribētu atgriezties pie vecvecākiem…."*

Fokusgrupas diskusijas noslēgumā sarunas dalībniekiem bija iespējams izteikt, vai un **kādi viņiem ir sapņi/vīzijas par savu novadu nākotnē.** Jāsaka, ka šo iespēju izmantoja tikai daži, uzskatot, ka tas, kas izteikts skaļi, parasti nepiepildoties. Taču bija arī viedokļi – ja nerunās par saviem sapņiem, tad nebūs arī iespējas realizēt, jo tam vajadzīgs citu atbalsts: *„Nē, par lietām ir jārunā..., ...es uzskatu, ka mums ir jāizmanto savas dabas bagātības , ..termiskie ūdeņi…"*

*„... varbūt man ir … viena tāda mazliet utopiska doma - attiecībā uz tūristiem. Man liekas, ja mums izdotos uztaisīt **apkārt mūsu novadam veloceliņu** ar iespējām braukt, apstāties, un jebkurā pagastā vai jebkurā vietā piedāvāt tūristam kaut ko paskatīties vai pārnakšņot, vai vienkārši atpūsties, ...nu tā, es nezinu, vai tas ir realizējams..."*

Protams, lai arī varbūt nepateikts, skaļi, tomēr sapnis katram noteikti ir, ko apliecina arī teiktais: *"Katrs mēs pie sevis domājam..."* Atliek vien šos sapņus censties realizēt dzīvē!

Secinājumi

1. Lai varētu īstenot ilgtspējīgas attīstības startēģiju, vietējās pašpārvaldes izmanto dažādas iespējas, tajā skaitā arī ES piedāvātos projektus igtspējīgas vides attīstīšanai. Viens no šādiem projektiem ir Baltijas jūras reģiona programmas *2007 - 2013* projekts **Trans in Form** (Lauku reģionu transformēšana, veidojot jaunus attīstības scenārijus, vēstījumus un pievilcīgu vides dizainu), kura **mērķis** ir veicināt mazo un vidējo pašvaldību konkurētspēju un ilgtspējīgu attīstību, veidojot tās pievilcīgākas dzīvošanai, darbam, investīcijām. Šajā projektā iesaistījies arī Jelgavas novads.
2. Projekta ietvaros notikušās fokusgrupas tematika sasaucas ar D. Jenkena un D. Vilkinsones norādītajiem četriem ilgtspējīgas attīstības pīlāriem – vidi, ekonomiku, sociālo dzīvi un zināmā mērā arī politisko sistēmu, kuras ietvaros var realizēt ilgtspējīgas attīstības uzdevumus.
3. Jelgavas novada pārvalžu pārstāvji - diskusijas dalībnieki kā būtiskāko, ar ko viņi lepojas savā pagastā, min dažādus vēsturiskos un dabas objektus – muižas, pilis, atceres vietas, īpašus kokus, specifiskas dabas ainavas, sava novada cilvēkus – gan vēsturiskas personības, gan tos, kas šobrīd dzīvo un strādā novadā, zemkopību kā novada galveno nodarbošanās virzienu, kultūru, izglītību, sportu.
4. Visi fokusgrupas dalībnieki centās parādīt tās priekšrocības, kas ir viņu pārvaldes teritorijā. Attiecībā uz to, ko teiktu svešiniekam vai tūristam, daudzi minēja, ka tas būtu tas pats, ar ko viņi principā lepojas savā novadā. Tika uzsvērts arī novada izdevīgais ģeogrāfiskais stāvoklis, kas ir būtiski gan tūrismam, gan biznesam. Tūrismam un arī biznesam ir svarīgi gan tie aspekti, kas saistās ar dabas vidi, ekonomikas attīstības vidi, gan tie, kas attiecas uz sociālo un pārvaldības sfēru.
5. Iezīmējas doma, ka pēc būtības tūrisma sfēra jau arī ir iespēja veidot biznesu – gan tādu, kas vistiešākajā veidā saistās ar kāda objekta (vēsturiska vai dabas) sakārtošanu vai radīšanu - tika minētas jaunu atpūtas vietu, tūrisma taku veidošana, skatu torņu celtniecība (īpaši – vietās pie ūdeņiem, kur var vērot ainavu, putnus), gan naktsmītņu iekārtošanu (arī telšu vietas) utml. Lai pilnveidotu tūristu piesaisti – izteikta doma par novada kopīga tūrisma bukleta izveidi, lai jebkurā novada pagastā būtu informācija par visu novadu, ko nepieciešamības gadījumā varētu izmantot.
6. Konkretizējot to, kas saistās ar iespējamo biznesa partneru/potenciālo vietejo uzņēmēju ieinteresēsanu, fokusgrupas dalībnieki minēja, ka pirmkārt, pastāstītu par to, kas katrā pagastā un novadā kopumā ir šobrīd, uzsvēru infrastruktūras priekšrocības, raksturotu

sociālo sfēru un pašvaldības iespējas biznesa veicināšanā. Novads nav viendabīgs, ir teritorijas, kuras vairāk piemērotas tradicionālajai lauksaimniecībai (Vilce, Zaļenieki, Platone, u.c.), bet citviet (Valgunde, Kalnciems, Līvbērze, Glūda) var attīstīt netradicionālākus uzņēmējdarbības virzienus, rūpniecisko ražošanu.

7. Raugoties pēc vecuma struktūras, novada lielākais iedzīvotāju skaits ir vidējās un vecākās paaudzes cilveku un, diemžēl jauniešu kļūst arvien mazāk. Tāpēc vēl jo aktuālāks ir jautājums, kas novadā tiek darīts un ko vēl var darīt, lai jaunieši neaizplūstu prom un aktīvi iesaistītos novada dzīvē. Lai jaunieši labprāt paliktu novadā, kā galvenais priekšnoteikums minēts darba vietu nodrosināšana, iespēja iegūt dzīvojamo platību, pieejams bērnudārzs, skola, veselības aprūpe, tāpat jāļauj viņiem pašiem vairāk uzņemties iniciatīvu, darīt to, kas tieši viņiem ir nozīmīgs, nevis vienmēr teikt priekšā vai pat likt kaut ko darīt. Tāpat jauniešu noturēšanā un piesaistē svarīga ir kultūras dzīve – iespēja gan apmeklēt kultūras pasākumus, gan pašiem piedalīties pašdarbībā.
8. Iespēju izteikt viedokli, kādi sarunas dalībniekiem ir sapņi/vīzijas par savu novadu nākotnē, izmantoja tikai daži, uzskatot, ka tas, kas izteikts skaļi, parasti nepiepildoties. Taču bija arī viedokļi – ja nerunās par saviem sapņiem, tad nebūs arī iespējas realizēt, jo tam vajadzīgs citu atbalsts.
9. Kopumā: novadam bagāta vēsture, lieliska Zemgales dabas ainava un liels attīstības potenciāls. Raksturīgākais: Lielupe, prasmīgi un čakli lauksaimnieki, daudz interesantu, taču pilnveidojamu objektu, kas būtu nozīmīgi gan tūrisma, gan ražošanai.

Izmantoto literatūras avotu saraksts

1. Beck U., (1992) Risk society: towards a new modernity, Sage Publications, 1992, 260 p.
2. Benn S., Dunphy D., (2005) Towards New Forms of Governance for Issues of Sustainabiliry: Renewing Relationships between Corporates, Governement and Community, Skat. internetā 02.06.2011. http://www.mngt.waikato.ac.nz/ejrot/vol9_1/benndunphy.pdf
3. Yencken D., Wilkinson D. (2000) Resseting the compass: Australia's journey towards sustainability. CSIRO Publishing, Skat. int. 07.05.2011., http://www.publish.csiro.au/samples/Resetting.pdf
4. Ilgtspējīga attīstība. Skat.internetā (06.06.2011.), http://www.vidm.gov.lv/lat/darbibas_veidi/ilgtspejiga_attistiba/
5. Latvijas ilgtspējīgas attīstības stratēģija līdz 2030.gadam (2008) , Skat internetā 06.05.2011. http://www.latvija2030.lv/upload/latvija2030_lv.pdf

STRUKTŪRFONDU NOZĪME UZŅĒMĒJDARBĪBAS ATTĪSTĪBĀ

THE ROLE OF EU STRUCTURAL FUNDS IN BUSINESS DEVELOPMENT

Sarmīte Bremze
Latvijas Lauksaimniecības universitāte, e-mail: sarma325@cs.llu.lv
Vladimirs Jefremovs
Baltijas Starptautiskā akadēmija, e-mail: bkinatasa@inbox.lv

Abstract. The aim of the article is to illuminate the data of the ERDF grant scheme "Support for Investment in Enterprise Development Especially in the Assisted Areas" on the impact on the development of business environment of Latvia on the return of grants and their promotion of entrepreneurship; the intention of the authors was the development of recommendations for elaboration of grant allocation criteria in Latvia in the future.
Within the course of the analysis attention is paid to such factors as: the official balance sheet data from 2003 to 2007; in 2008 and 2009 , Regulations of the Introduction of EU Structural Funds 2007-2013, strategic guidelines for the funding of priority directions, EU Regulations, Regulations of the Cabinet of Ministers, etc.
A descriptive analysis of business activities of enterprises is carried out, and the reflection of changes in export, added value, labor force wages, etc. and other indicators of regional development were examined and the most significant were described in the article.
Structural funds were invested in various businesses in Latvia and it was found that allocated grants activity cannot be measured clearly according to the existing criteria. Little or no economic-mathematical methods are used for the assessment of enterprise, business or regional growth in Latvia.
The development of the procedure of grant allotment has to be discussed; the criteria of assessment within the scheme have to be discussed, elaborated and adopted. It is necessary to introduce and apply economic-mathematical methods to evaluate returns in business.
Key words: Business, regional development, investments, support scheme, evaluation methods, return/gain

Ievads

Pēdējos gados Latvijā ir ieplūdušas lielas investīcijas no Eiropas Savienības struktūrfondiem grantu veidā. Jautājums par šo naudas līdzekļu ieguldījumu efektivitāti ir kļuvis aktuāls, jo ieguldīt vēl nenozīmē gūt gaidīto atdevi.

Valsts reģionālās attīstības aģentūra (VRAA) 2004.-2006.gadā administrēja Eiropas reģionālā attīstības fonda (ERAF) grantu shēmas „Atbalsts ieguldījumiem uzņēmumu attīstībā īpaši atbalstāmajās teritorijās" ieviešanu Latvijas reģionos.

Darba gaitā autori vēlējās noskaidrot, vai ERAF grantu shēmā sākotnējais mērķu un vērtēšanas kritēriju uzstādījums ir bijis atbilstoši saskaņots, lai veicinātu normatīvajos aktos deklarēto ilgtermiņa rezultātu sasniegšanu Latvijas reģionālajā attīstībā.

Pasaulē grantu efektivitātes novērtēšanai kā piešķiršanas fāzē, tā arī reālajai atdevei tiek plaši pielietotas dažādas ekonomiski- matemātiskās metodes. Latvijā līdz šīm šādas metodes nav ieviestas.

Darba **mērķis** ir, analizējot ERAF grantu shēmas „Atbalsts ieguldījumiem uzņēmumu attīstībā īpaši atbalstāmajās teritorijās" datus par līdzšinējo grantu atdevi uzņēmējdarbības

veicināšanā, sagatavot ieteikumus turpmāko grantu piešķiršanas kritēriju izveidei.

Kā ierobežojums jāmin projekta nesenā īstenošana, kā rezultātā pētījuma izstrādes gaitu ierobežoja datu trūkums par 2008.gadu un to nepieejamība. Pētījums balstīts uz grantus saņēmušo uzņēmumu darbības analīzi, tomēr, tā kā oficiālos bilances datus uzņēmumi komercreģistrā drīkst iesniegt līdz nākamā gada maijam, pētījuma autoriem bija pieejama informācija par uzņēmumu darbību tikai līdz 2008.gadam. Arī Centrālās statistikas pārvaldes dati par sadalījumu reģionālā griezumā bija pieejami ar apmēram 2 gadu nobīdi.

Tā kā ES struktūrfondu ieviešanas nosacījumi 2007.-2013.gada plānošanas periodam ir noteikti vairākos plānošanas dokumentos, kas iedalāmi ES līmeņa un nacionālā līmeņa dokumentos, tad papildus bija jāņem vērā dažādas regulas par ES fondu līdzfinansējumu, kur noteikti ESF un ERAF vispārīgie ieviešanas nosacījumi, ko detalizētāk nosaka katra dalībvalsts.

Latvijā ir spēkā Valsts stratēģiskais ietvardokuments (VSID), kurš ir līdzvērtīgs Latvijas līmeņa galvenajam struktūrfondu plānošanas dokumentam, kas nodrošina kohēzijas politikas sasaisti ar nacionālajām prioritātēm un pamato šo prioritāšu izvēli, kā arī nosaka ES struktūrfondu apguves stratēģiju Latvijā, fondu vadības ietvaru, nodrošina koordināciju starp darbības programmām un citiem finanšu instrumentiem un katram fondam paredz līdzekļus noteiktā apmērā, sadalot tos pa tā sauktajām darbības programmām.(ES projekti, 2008) Valstī ir izstrādātas trīs darbības programmas (līdzvērtīgi dokumenti 2004.-2006. gada Programmas papildinājumam), kuras ietver pamatojumu līdzekļu ieguldījumam konkrētos uzņēmumos, finansējuma sadalījumu atbalsta jomām, izvirza kritērijus, ar kuru palīdzību vērtē izvērtēto līdzekļu efektivitāti, u.c. Katrai no darbības programmām izstrādāti papildinājumi, kuri detalizēti skaidro darbības programmās iekļautos pasākumus (attiecināmās izmaksas, finansējuma saņēmējus, finansējuma sadalījumu, ieviešanas veidu, iesaistītās institūcijas u.c.). Darbības programmu un attiecīgi to papildinājumu ieviešanai paredzēti ESF, ERAF un Kohēzijas fonda līdzekļi. (LRCSP, 2008) Darbības programmās un to papildinājumos noteiktie ES struktūrfondu līdzekļi tiek strukturēti pa prioritātēm.

Katras aktivitātes vai apakšaktivitātes īstenošanu 2007.-2013.gada plānošanas periodā, atšķirībā no iepriekšējā plānošanas perioda, nosaka MK noteikumi. Darbības programmu aktivitātes un apakšaktivitātes, kas tiek līdzfinansētas no ESF un ERAF līdzekļiem, tiek īstenotas divos projektu konkursu veidos: 1) Atklāta projektu iesniegumu atlase (APIA); 2) Ierobežota projektu iesnieguma atlase (IPIA) .(ESSVL,2007)

ES fondu vadību Latvijas normatīvo aktu sistēmā regulē **Eiropas Savienības struktūrfondu un kohēzijas fonda vadības likums** un 26.06.2007. MK noteikumi Nr.419 **"Kārtība, kādā Eiropas Savienības struktūrfondu un Kohēzijas fonda vadībā iesaistītās**

institūcijas nodrošina plānošanas dokumentu sagatavošanu un šo fondu ieviešanu".

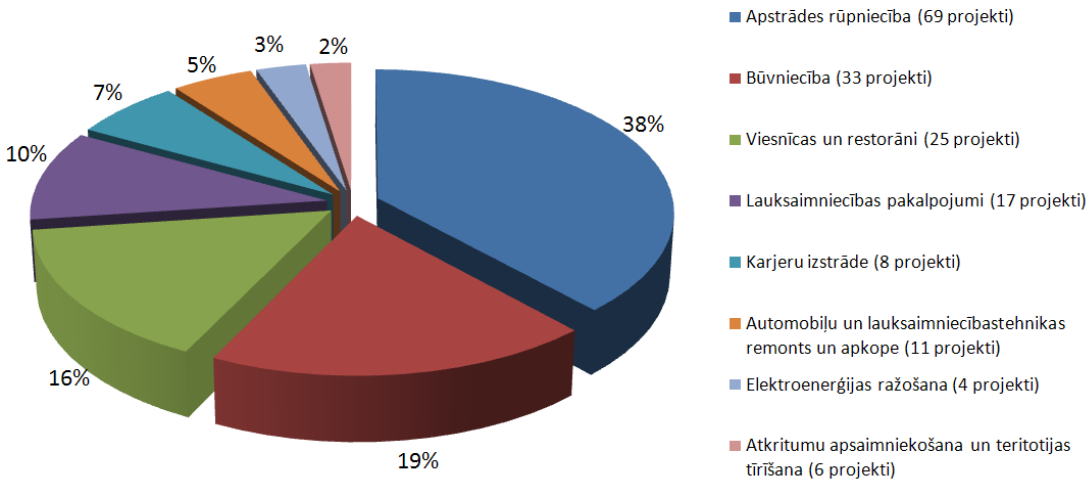
2007.-2013.g. plānošanas periodā ES fondu atbalsts primāri virzīts uz iedzīvotāju izglītību, uzņēmumu tehnoloģisko izcilību un elastību, kā arī zinātnes un pētniecības attīstību, lai veicinātu zināšanu ietilpīgas ekonomikas veidošanos valstī un stiprinātus citus nepieciešamos priekšnoteikumus ilgtspējīgai ekonomiskai attīstībai un cilvēku dzīvei Latvijā kopumā.

Īpaši atbalstāmās teritorijas

„Īpaši atbalstāmo teritoriju attīstība tiek veicināta ar īpašu kredītpolitiku, nodokļu atvieglojumiem un Reģionālā fonda līdzekļiem, kas nodrošina papildu iespējas finansēt projektus, kuru īstenošana attiecīgajā teritorijā veicina saimniecisko darbību, rada jaunas un saglabā esošās darba vietas un sekmē šīs teritorijas iedzīvotāju dzīves līmeņa celšanos."(MK,2003) ĪAT statuss pastāv kopš 1998.gada, tomēr tā noteikšanas un piemērošanas metodika ir mainījusies, tādējādi mainoties arī teritoriālajam sadalījumam.

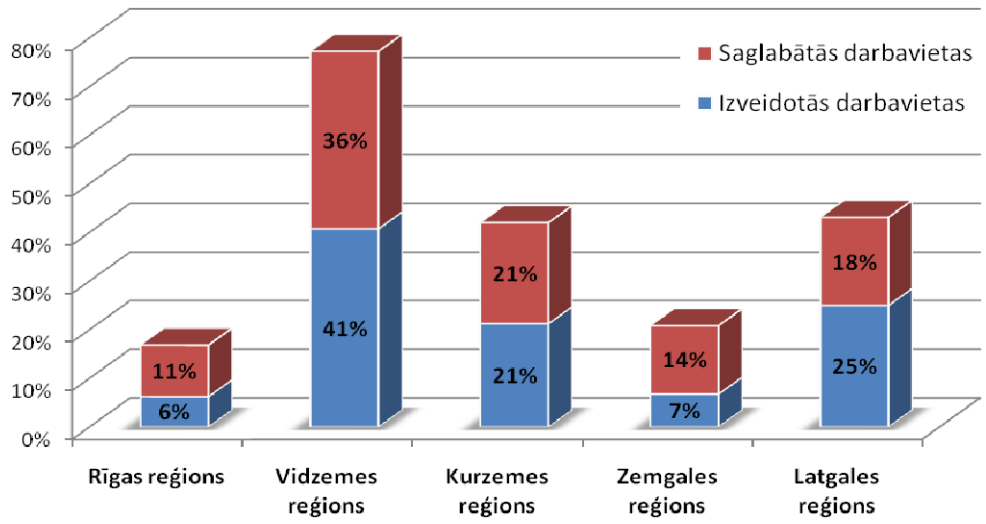
Atbilstoši MK noteikumi Nr.637 ĪAT noteikšanai kā galvenais rādītājs tiek izmantots teritorijas attīstības indekss. Rādītājs Latvijā tiek izmantots kopš 2000.gada. Grantu shēmas ietvaros, tika iesniegti 388 projektu pieteikumi, no kuriem 175 atstiprināti, bet reāli tika noslēgti 173 līgumi par projektu realizāciju.

Atbilstoši likumdošanas prasībām, uzņēmumiem pēc projekta īstenošanas ir jāiesniedz pārskats, (kā arī turpmākos piecus gadus – uzņēmuma gada pārskats). Tomēr gada pārskatos sniegtā informācija tiek pārbaudīta vienīgi no uzņēmuma likviditātes un darbības turpināšanas viedokļa, neveicot nekādu padziļinātu, atbalstīto uzņēmumu darbības analīzi, lai noteiktu izlietotās naudas atdevi un lietderību.



1.att. Atbalstīto nozaru dalījums pēc publiskā finansējuma apjoma %

Vislielākais atbalstīto projektu skaits ir apstrādes rūpniecībā (41%), tālāk seko būvniecības sektors ar 19% un viesnīcas un restorāni ar 14% (skatīt 1. attēlu). Skatoties pēc piešķirtā finansējuma apjoma pa nozarēm situācija saglabājas nemainīga – apstrādes rūpniecība – 38%, būvniecība 19%, viesnīcas un restorāni – 16%, kas liecina, ka viesnīcu un restorānu sektorā projektu vidējais apjoms bijis lielāks, kā citām nozarēm. Jaunradīto darba vietu skaits, ir viens no trīs programmai uzstādītajiem indikatoriem. Tā noteiktais minimums – 420 jaunradītas un / vai saglabātas darbavietas (skatīt 2.attēlu). Jaunradīto darba vietu skaits, ir viens no trīs programmai uzstādītajiem indikatoriem. Tā noteiktais minimums – 420 jaunradītas un / vai saglabātas darbavietas (skatīt 2.attēlu). Saskaņā ar VRAA datiem grantu shēmas atbalstīto projektu ietvaros izveidotas un saglabātas 2236 darba vietas. Visvairāk jaunās darba vietas radītas Vidzemes reģionā (524) un Kurzemes reģionā (298). Arī visvairāk saglabāto darba vietu ir Vidzemes (163), Latgales (100) un Kurzemes reģionā (85). Procentuālais sadalījums pa plānošanas reģioniem redzams diagrammā.



2.att. Darba vietu sadalījums pa plānošanas reģioniem % sadalījumā (katra kategorija summa veido 100%)

Pētījumam tika izvēlēti 16 uzņēmumi, kas saņēmuši grantu shēmas atbalstu, atlasot tos pēc sekojošiem kritērijiem:

a) Saņemtā *granta apjoms pārsniedz 50 000 LVL*. Kritērijs izvēlēts, lai iegūtu informāciju par iespējami lielāka piešķirtā finansējuma atdevi.

b) Uzņēmums darbojas un *saimniecisko darbību* un to *veic* vismaz kopš *2003.gada*. Kaut arī uzņēmuma iepriekšējā darbība nav obligāta prasība grantu shēmā, šāds kritērijs izvēlēts, *lai precīzāk analizētu investīciju ietekmi uz uzņēmējdarbību* – kāda ir uzņēmuma darbība pirms un pēc granta saņemšanas, lai spētu novērtēt atdevi un izdarīt secinājumus par grantu finansējuma lietderību.

c) Uzņēmumi *atrodas dažādos plānošanas reģionos*.

Analīzei tika izmantoti uzņēmumu iesniegto gada pārskatu materiāli un tajos atspoguļotā informācija, sadarbojoties ar VRAA. Reģionu rādītāji tika aprēķināti, izmantojot CSP datubāzēs atrodamo informāciju. Pētījuma gaitā autori apskatīja un analizēja sekojošus rādītājus: 1) neto apgrozījuma pieaugums; 2) eksporta īpatsvars, pieaugums; 3) peļņas pieaugums; 4) algu fonda pieaugums; 5) darbinieku skaita izmaiņas.

Ar reģiona datiem salīdzināti radītāji: 6) produktivitāte un tās izmaiņas (skat. 3.att.); 7) PV uz strādājošo un tās izmaiņas (skat.4.att).

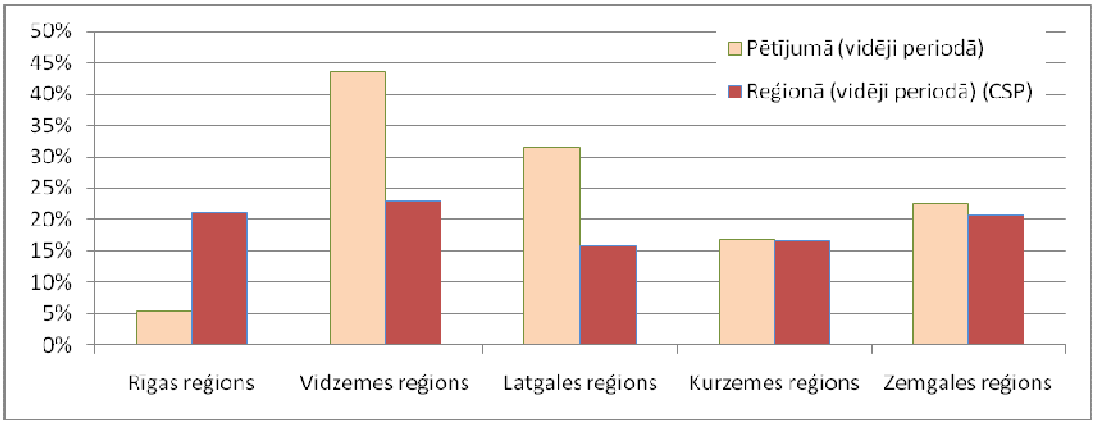
Reģionu attīstības deskriptīvā analīze

Deskriptīvā analīze dod iespējas autoriem spriest par tendencēm uzņēmumu un reģionu attīstībā, kā arī veikt sākotnējo novērtējumu piešķirto grantu atdevei. Analizēti tika iepriekš minētie rādītāji, bet dotajā pētījumā tikai daži tika īpaši akcentēti.

Produktivitāte

Produktivitāte pavisam vispārīgi tiek definēta kā „izlaides attiecība pret izlietojuma vienību". Pētījumā izmantotais produktivitātes rādītājs aprēķināts kā uzņēmuma neto apgrozījums dalīts ar nodarbināto skaitu attiecīgajā laika periodā.

Vidējais produktivitātes pieaugums reģionā apskatītajā laika periodā visaugstākais ir bijis Vidzemes reģionā: apmēram 45% ikgadēji apskatītajos uzņēmumos, kamēr vidēji reģionā šis rādītājs ir bijis divas reizes zemāks (apmēram 23% ik gadu). Arī Latgales reģionā pētījuma uzņēmumu produktivitāte ir augusi ievērojami straujāk kā vidēji reģionā.

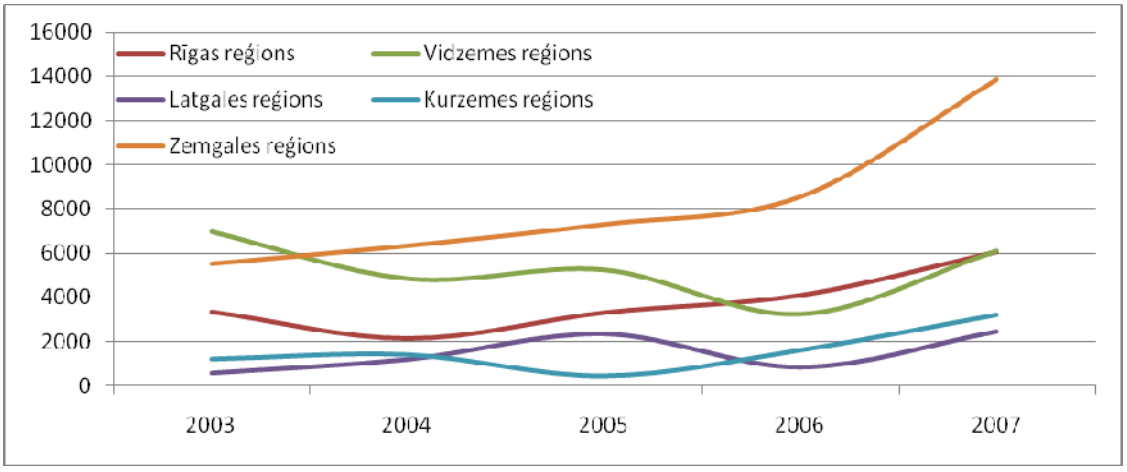


3.att. Produktivitātes pieaugums vidēji 2004.-2007.gada periodā pētījumā apskatītajiem uzņēmumiem un reģiona datiem, procentos

Rīgas reģionā vidējais produktivitātes pieaugums apskatītajos uzņēmumos ir ievērojami zemāks kā vidēji reģionā (attiecīgi 5 un 21% ik gadu), kas ir nepietiekams rādītājs. Kurzemes un Zemgales reģionos produktivitātes rādītājs pētījumā un vidēji reģionā ir pieauguši apmēram vienā tempā.

Pievienotā vērtība uz vienu strādājošo

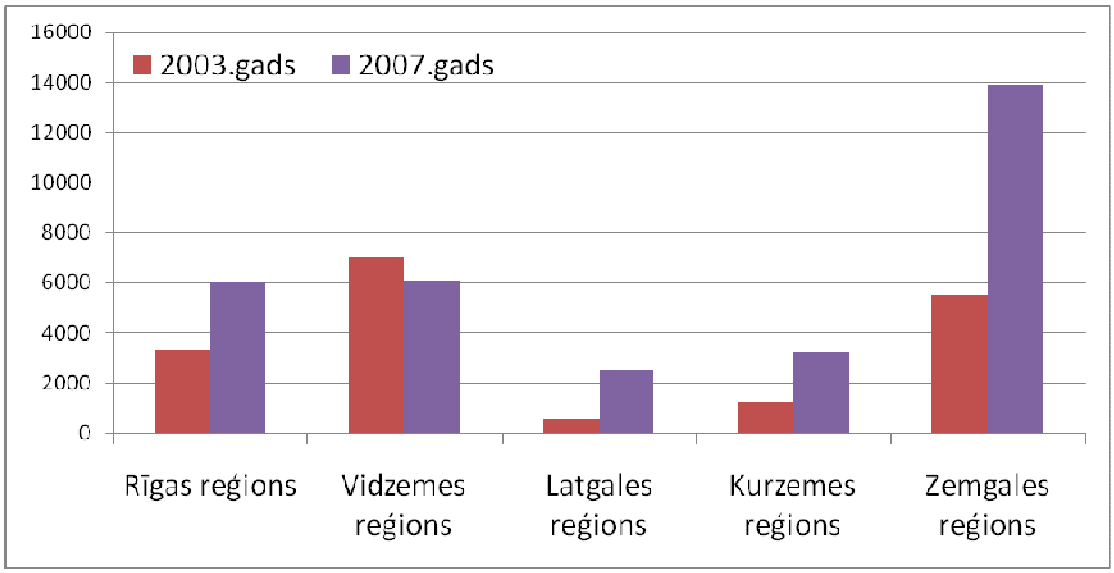
Pētījumā veiktajos aprēķinos pievienotā vērtība aprēķināta kā samaksāto nodokļu, peļņas un algu fonda summa dalīta uz nodarbināto skaitu uzņēmumā. Reģionā dati aprēķināti kā PV absolūtajos skaitļos dalījums uz nodarbināto skaitu, lai dati būtu salīdzināmi pētījuma ietvaros. Datus var aplūkot 4. att.



4.att. Pievienotā vērtība reģionos 2003.-2007.gada pētījumā apskatītajiem uzņēmumiem

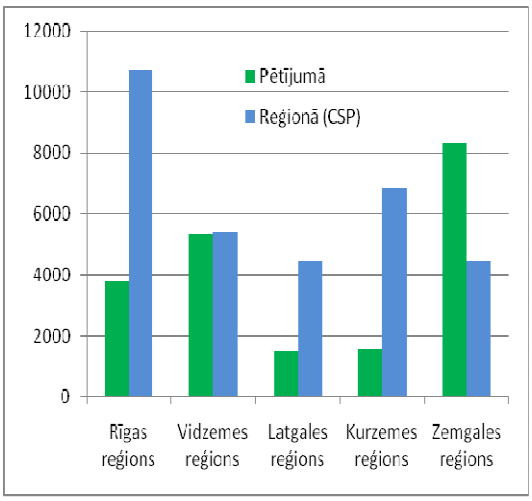
Kā redzams pēc pētījuma laikā iegūtajiem datiem, tad pievienotā vērtība uz vienu strādājošo reģionos ir bijusi mainīga. Vispozitīvāko tendenci uzrāda Zemgales uzņēmumi (vidējā PV vērtība apskatītajā laika periodā – 8327 Ls/strādājošo). Pievienotā vērtība uz vienu strādājošo ir nepietiekami zema Kurzemes un Latgales reģionā svārstoties ap 2 000 latu uz strādājošo, kas ir četras reizes zemāks nekā Zemgalē.

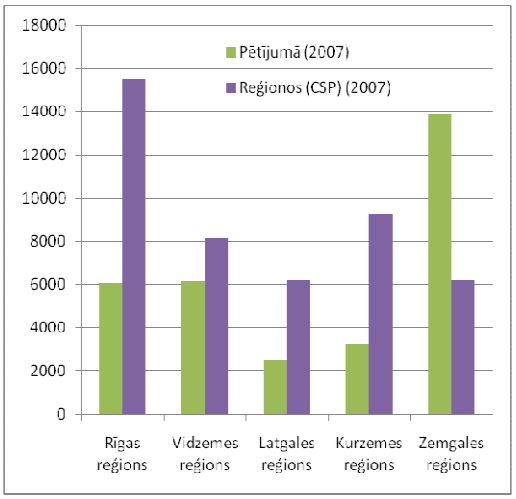
Kaut arī Vidzemē vidēji pievienotās vērtības rādītājs ir salīdzinoši augsts (5296 Ls uz apskatīto laika posmā) starp reģioniem, tam vērojama negatīva tendence samazināties. Pozitīvi vērtējams fakts, ka 2007.gadā visos pārējos reģionos vērojams PV pieaugums, salīdzinot ar 2006.gadu.



5.att. Pievienotā vērtība pētījumā apskatītajos uzņēmumos 2003. un 2007.gadā absolūtajos skaitļos

Salīdzinot uzņēmumu PV 2003. un 2007. gadā absolūtajos skaitļos, jāsecina, ka četros no pieciem reģioniem PV pieaugums ir bijis ievērojams. Vienīgi Vidzemē, salīdzinājumā ar 2004. gadu, PV ir samazinājusies par aptuveni 13%. Kaut arī izaugsmes rādītāji ir pozitīvi, PV līmenis pētījuma laikā iegūtajos rezultātos ir pat vairākas reizes zemāks par vidējo līmeni reģionā attiecīgajā laika periodā (šāda situācija vērojama Rīga, Latgales un Kurzemes reģionu uzņēmumos). Vidzemē PV uz strādājošo vidēji bijusi reģiona kopējā līmenī. Vienīgi Zemgales reģionā ir vērojams PV pozitīvs pārsvars pār reģiona vidējo rādītāju.





6.att. PV vidēji par 2003.-2007.gada periodu (pa kreisi) un uz 2007.g.beigām (pa labi) pēc pētījuma rezultātiem un reģiona aprēķiniem, izmantojot CSP datus.

Pievienotās vērtības izmaiņas pa gadiem ir ļoti nestabils rādītājs, nelielās izlases dēļ, tāpēc tas nesniedz vispārināmu informāciju, tomēr ir iespējams noteikt tendences– pozitīvu PV pieaugumu virs vidējā pieauguma reģionos uzrāda Latgales, Kurzemes un Zemgales reģionu uzņēmumi, Vidzemē – pozitīvu kopējo pieaugumu, bet zem vidējā reģiona līmeņa. Kopumā PV dinamika ir pozitīva, tomēr, lai atbalsts uzņēmumos sniegtu nopietnu ieguldījumu reģionu attīstībā, tās līmenim kopumā būtu jābūt vēl augstākam un attīstībai straujākai.

No 16 atbalstu saņēmušo uzņēmumu analīzes var secināt, ka, kaut arī vidējos rādītājos uzņēmumu darbības tendences ir pozitīvas, izsniegto grantu ietekme uz uzņēmumu attīstību caurmērā nav vērtējama viennozīmīgi. Retos gadījumos ir saskatāma skaidra granta ietekme uz strauju uzņēmuma attīstību. Salīdzinoši daudzi uzņēmumi uzrāda pat negatīvas attīstības tendences, kā arī kopējās pozitīvās tendences reģionos tomēr nerada pārliecību par ievērojamu atdevi un ietekmi uz reģionu attīstību.

Secinājumi

Kaut arī ERAF grantu shēmas „Atbalsts ieguldījumiem uzņēmumu attīstībā īpaši atbalstāmajās teritorijās" normatīvā bāze, kaut tā izstrādāta atbilstoši visām ES likumdošanas prasībām, tajā ir vērojamas nepilnības, kuru dēļ netiek veikta projektu pieteikuma vispusīga analīze, kas nodrošinātu augstākas ticamības vērtējuma sniegšanu kā

projektu pieteikumu izvērtēšanas, tā arī projektu īstenošanas fāzē. Latvijā grantu shēmas ietvaros nav veikta projekta ieviešanas rezultātu analīze, kas liedz iespējas novērtēt jau izsniegto grantu lietderību, lai izvairītos no kļūdām turpmākā valsts atbalsta piešķiršanā. Pētījuma laikā veiktā sešpadsmit atbalstu saņēmušo uzņēmumu analīze, liecina, ka šajos uzņēmumos ieguldīto grantu atdeve, kaut formālos rādītājos ir ļoti augstā līmenī, nav devusi gaidīto atdevi reģionu attīstībā kopumā. Pētījumā iegūtie rezultāti ir viens no pirmajiem soļiem valsts grantu un investīciju novērtēšanā Latvijā, lai izraisītu plašāku diskusiju par grantu piešķiršanas mehānismiem un iespējām tos uzlabot, iegūstot augstākas atdeves instrumentu pielietošanu reģionu attīstības veicināšanā.

Priekšlikumi

1. Noteikt vienu konkrētu pievienotās vērtības uz darbinieku līmeņa indikatoru vienādu visai Latvijai un visu veidu projektiem. Šo pievienotās vērtības indikatoru nospraust būtiski augstāku nekā Latvijas vidējais un izvelēties 75% no ES25 vidējās pievienotās vērtības uz darbinieku 2003. gadā. *Argumentācija* - Latvijā iekšējā migrācija ir pārāk intensīva, lai nospraustu atšķirīgus mērķus dažādiem reģioniem. Tas būtiski sarežģītu aprēķinus. Indikatora vērtība izvēlēta ievērojami virs Latvijas vidējā, jo pieejamais finansējums ir ļoti ierobežots un *ļauj atbalstīt tikai paraug-projektus*.
2. Izmantot diskonta likmi 30% apmērā. *Argumentācija* - Latvijas biznesa riska līmenis ir būtiski augstāks nekā Īrijā.
3. Izmantot īsāku atskaites periodu - 3 gadus. *Argumentācija* - SF apgūšana ir jāveic pietiekoši īsā laika posmā un ņemot vērā to, ka iespējams programmā varētu pieņemt pieteikumus arī 2012. gadā, ilgāks atskaites periods neiekļautos SF apgūšanas termiņos.
4. Lai nākotnē uzņēmējiem būtu vieglāk sagatavot nepieciešamos pieteikumu dokumentus, jāsamazina un jāoptimizē valsts aparāta sistēmu, kura ir izveidojusies pārāk liela un sarežģīta.
5. Lai vairāki uzņēmumi pasākumus efektīvāk īstenotu un nebūtu tik daudz ierobežojumu, valstij ir jārod pietiekams valsts budžeta finansējums, jo gaidītā atdeve reģionos kopumā ir zema.
6. Valsts atbalsta piešķiršanai, būtu nepieciešams piemērot ne vien kvalitatīvo (ekspertu) vērtēšanu, bet arī objektīvi kvantitatīvo vērtējumu, kas nodrošinātu lielāku objektivitāti un salīdzināmību, samazinātu projektu vērtēšanas laikā radītās kļūdīšanās efektu un palielinātu izvirzīto mērķu un reālās atdeves saskaņotību.

7. Lai pilnīgāk iepazītu grantu atdevi uzņēmumiem, būtu nepieciešama matemātisko metožu pielietošana, jo īpaši izmaksu – ieguvumu analīze, kas nodrošina to, ka kopējā atdeve valsts investīcijām privātajā sektorā jebkurā gadījumā būs pozitīva.
8. ES struktūrfondu novērtēšanā izdevumu – ieguvumu analīze pamatā tiek pielietota un rekomendēta ļoti lielu projektu novērtēšanā, bet izveidojot vienkāršu modeli, tas ērti pielietojams ari salīdzinoši mazāku projektu novērtējumam.

Izmantoto literatūras avotu saraksts

1. Reģionālās attīstības likums. 2002.gada 9.aprīlis.
2. Eiropas Savienības struktūrfondu un Kohēzijas fonda vadības likums. 2007.gada 23.februāris.-51 lpp.
3. MK noteikumi nr.133 ”Par plānošanas reģionu teritorijām”. 2003.gada 25.marts.
4. MK noteikumi Nr.637„Īpaši atbalstāmās teritorijas statusa piešķiršanas un atcelšanas kārtība”. 2003.gada 11.novembris.
5. Latvijas tautsaimniecības attīstība, LR Ekonomikas ministrija, Rīga, 2008., 146 lpp.
6. ERAF grantu shēma „Atbalsts ieguldījumiem uzņēmumu attīstībā īpaši atbalstāmajās teritorijās” īstenotie projekti., Valsts reģionālās attīstības aģentūra, 2007., 26 lpp.
7. Eiropas Savienības projekti Latvijā., 2008., 15.lpp, Apgāds Mantojums.
8. Par informācijas sabiedrību Latvijā, Latvijas Republikas Centrālā statistikas pārvalde, Rīga, 2008., 135 lpp.

E-LEARNING – A CONTEMPORARY TERTIARY EDUCATION SOLUTION IN THE CONTEXT OF GLOBALISATION

Mag. phil. Anita Emse
Mag. sc. comp. Sundars Vaidesvarans
School of Business Administration Turība, Latvia
Graudu street 68, Riga, LV-1058, anita.emse.turiba.lv, tel. 67615541

Abstract. Social, economic and political changes under the influence of globalisation and the economic crisis has led to migration of Latvians to other EU member states or abroad in search of better work opportunities often discontinuing tertiary education in Latvia. The lack of proficient knowledge of foreign languages hinders pursuing tertiary education. Therefore this paper looks at e-Learning as a contemporary solution for pursuing tertiary education.
The aim of the paper is to ascertain the e-learning offer in Latvia in comparison to other European countries. The reasons for the choice of e-Learning as a form of acquiring education have been explored in the paper using the statistical information gathered by the E-projects department of the School of Business. The main focus of the paper is on academic e-learning programmes offered by higher education institutions that result in the award of a professional diploma, bachelor or master's degree.
Theoretical and practical research point out that opportunities offered by e-Learning are yet to be exploited fully in Latvia in comparison to other European countries. E-learning development and management policy in Latvia lacks goal-oriented organisation. The quality of methodological materials and organisation in various institutions in Latvia differs widely.
Nevertheless as indicated by the practical research there is an increasing trend of demand for e-Learning as a form of education.
Key words: e-learning, distance learning, academic and professional e-learning programmes

Introduction

The apparent dissolution of borders between states due in part to the virtual environment has been characteristic of the 21st century. The information space is open and easily accessible from any country in the world. Only two skills are necessary preconditions – information technology skills and language skills for successfully becoming a part of the modern day society. The free labour market offers each and every member of the society the opportunity to work in any part of the world. The precondition is the competitiveness of each individual in terms of his knowledge, skills, abilities and desire to learn lifelong. A learning society is the need of the present and the future and therefore the process of internationalisation of education is becoming ever more topical and the ability of an individual to adapt to the demands of the new era is ever increasingly important. It is important to constantly further one's professional qualification to successfully compete in the labour market.

The tasks set for personal development of each individual during his lifetime in the European Commission white paper: further the employability and working life potential paying special attention to the enhancement of knowledge, skills and social abilities, foreign language skills, communication skills, skills of working in a team etc. (Kristovska, 2005).

In order to develop adult competences, ensure their enhancement to satisfy the needs of each and every individual lifelong, it is necessary to change the learning content, forms, methods and means. Distance learning or e-Learning is most appropriate for this offering the possibility of learning at any age, place or at any convenient time. The main advantage is that it is a form of studies that enables an individual to successfully combine studies and work using a study system based on information technologies (Mayer, Seufert, 2002, Mangale, 2006, Maier, 2006).

Research methodology

The aim of the research is to ascertain the e-Learning offer in Latvia compared to some European countries and how the changes in the labour market and economy have impacted the demand for education through e-Learning.

The following research methods were used to carry out the research:

- Analysis of theoretical literature and sources to ascertain and compare the organisation and development of e-Learning in Latvia and Germany;
- Data gathering through a questionnaire to ascertain the reasons for the choice of e-Learning as a form of studies and to study the changes in the demand for acquiring education through e-Learning under the influence of the economic crisis and changes in the labour market;
- Data processing using Excel for closed questions and content analysis of open questions included in the questionnaire;
- Mathematical statistical methods analysing the data on changes in number of students under the influence of changes in the economy and free labour market.

The research was carried out using the statistical information gathered by the E-project department of the school of Business Administration Turiba on the number of students, student flow, trends over the various years and the survey of students. The age of student respondents ranged from 23 – 58 years. 83% of the respondents live and work abroad. The sample of the survey consisted of forty three 1st level professional higher education study programme students and sixty two students of professional bachelor programmes of the School of Business Administration Turiba.

Theoretical grounds of the research

An increasing number of people are opting for e-Learning as a convenient, contemporary and sufficiently qualitative form of learning (Fernunterrichtsstatistik, 2011, Wiepcke, 2006, Maier,

2006, Fernstudium, 2011). Based on the analysis of literature and sources it could be concluded that e-Learning is an innovative form of learning based on the use of computers and the Internet in the study process thereby ensuring higher accessibility and quality of studies (Mayer , Seufert, 2002, Kokina, 2009, Wiepcke, 2006, Kristovska, Ivanova, 2002). E-Learning is widely practised in Universities and it is provided for by the accessibility to study content in a variety of forms using multimedia, compact discs, printed materials and opportunity to work on the universities' e- forums and contacting the teachers through e-mail or skype as well as in person. Studying in a web based environment, an individual independently resolves all the study tasks but has the possibility of using an Internet consultant which helps him understand the study content and resolve the tasks (Sauter , 2004, Kokina, 2009).

The memorandum on recognition of distance learning in Europe in 1991 (Position paper on distance learning in Europe, 1991) recognises distance learning as one of the most effective instruments in education and further qualification of individuals. The European Union stimulates and financially supports the development of e-Learning, however the development of e-Learning in each member state differs. For example 220 000 adults study at the Open University in Great Britain through distance learning and 600 study courses and over 250 specialities are offered (Study at the OU, 2011).

383 000 people studied part time through distance learning in Germany in 2009. More than 2 363 state accredited study programmes and modules are offered in e-Learning form in more than 316 institutions in Germany. 43% of the study programmes offered are bachelor programmes and 57% (162) are postgraduate programmes. One fourth of the programmes offered are in the field of entrepreneurship and commerce (Fernstudium Rundschau, 2011).

Germany has two administrative institutions that supervise and organise the development of e-Learning in the country: the forum "Distance e-Learning" (das Forum DistancE-Learning) and State distance learning Centre (ZFU- Zentralstelle für Fernunterricht) (Forum Distanc E-Learning, 2010).

The Forum DistancE-Learning is a professional union for the organisation of e-Learning. This union organises, supervises and popularises e-Learning in more than 80% of institutions in Germany (Forum Distanc E-Learning, 2010).

All the education offered in e-Learning form is supervised in Germany by the State distance learning control (ZFU) in Cologne. The organisation checks the quality of the study material, its content and technical support before the implementation of any new e-Learning study course. The ZFU checks the legal aspects of the study contracts to ensure they comply with the distance

learning legislation. The new programmes are supervised over a period of three years to ensure that they comply with the contextual, technical and legal preconditions (Forum Distanc E-Learning /2010).

Distance learning or e-Learning was started in Latvia in the 90's of the 20th century (Kristovska, Ivanova, 2002). In accordance to the Law on Education of the Republic of Latvia, e-learning is defined as an extramural form of education (Law on education, 1999). After regaining of independence, a small group of enthusiasts developed and offered learning solutions in distance learning form. A wider research on the management of distance learning study support systems for the enhancement of competences of adults was carried out by Ineta Kristovska in 2005 underlining the fact that distance learning has proved itself to be an innovative form of adult education.

The introduction of distance learning as an innovative study form is a complex process, which requires special organisational provisions and management (Kristovska, 2005).

The term "management" in distance learning according to I. Kristovska is the organisation, maintenance and development of goal oriented (clear, concise, feasible and achievable goals), creative, open and flexible study support system using various resources (Kristovska, 2005).

The distance learning support system according to I. Kristovska definition is a complex system whose main task is to assist adults, stimulate their activity, motivate and support them to acquire the competences (Kristovska, 2005).

The School of Business Administration Turiba has been implementing part time professional and academic study programmes for already 11 years based on I. Kristovska's support model. It has been proven in practice and has been highly appreciated by the students. Of course with the rapid development of information technology resources the technical support system for the study process has been modernised: the methodological learning materials and communication between students and educators in the virtual environment.

As there is a lack of an unified e-Learning organisation and management system in Latvia the quality of design of learning materials, their contents and choice of Internet technology has been left to each individual institution itself be it a state or a private higher education institution or a big or a small training centre and as a result they differ considerably in terms of quality. Most of the HEI's and colleges use separate IT elements (Internet, DVD, CD) in their study processes that are integrated with traditional forms of studies or offer several subjects in the form of modules to be acquired through a web based environment (University of Latvia, Riga Technical University, Latvian University of Agriculture, Latvian Arts Academy, Music Academy etc.) (Kokina, 2009).

Only few Latvian higher education institutions offer the possibility of studying in accredited study programmes that result in the award of bachelor, master's degree or a college diploma (School of Business Administration Turiba, Baltic Business College, Vidzemes University of Applied Sciences, Law College) (Kokina, 2009).

The study programmes, content of learning materials and requirements to be met for students of distance learning or e-Learning do not differ from the traditional study forms and the only difference is the form of studies. E-learning take place through independent learning on a web based environment using Internet, computer and learning materials specially designed by the educators.

The fact that e-Learning opportunities and the desire and necessity for acquiring education through e-Learning in Latvia is increasing is validated by the fact that the Ministry of Education and Science of the Republic of Latvia accredited the first distance learning secondary school in Latvia and the Baltics a year ago (Matisāne I., 2010).

The opportunity to acquire secondary and tertiary education through distance learning is a very successful solution under the present economic crisis when a part of the teenagers along with their families have moved to live abroad and are unable to integrate themselves in such a short period in a different education system due to the lack of knowledge of languages and psychological problems.

Research results

The practical part of the research focuses on the impact of the free labour market and the world economic crisis on the demand for education through e-Learning.

The economic crisis and the ever more increasing opportunities of gaining employment in labour markets abroad after the accession of Latvia into the European Union positively influenced the demand for e-Learning. It is shown by the statistical data for the period 2005-2010 gathered by the School of Business Administration Turiba. As can be seen in the Fig. 1 the number of students over the period 2005-2010 has a growing trend.

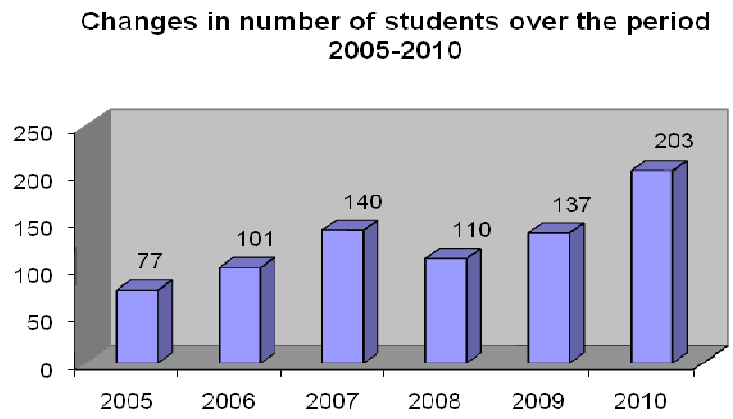


Fig.1. Changes in number of students over the period 2005-2010.

At the beginning of the economic crisis in 2008 there was a rapid fall in the number of students. This was due to the inability of students to pay tuition fees as a result of which a lot of students requested academic leave or discontinued studies. The world economic crisis also deterred a lot of students from commencing studies. The priorities of a lot of individuals changed as a result of the economic crisis. They were not ready to invest in their own personal development and chose to earn a living in the short term.

However it can be seen from the figures for 2009 that the number of students reached the pre crisis level (refer Fig. 1) when the Latvian society experienced the worst impact of the economic crisis with raise in taxes, liquidation of social guarantees and rise in unemployment. As a result of these official government policies people in masses left Latvia in search of employment abroad and choose e-Learning as the only possible form of continuing or commencing studies. Therefore there was an increase in demand for this form of studies and the levels almost reached the pre crisis figures.

Fig.2 shows the reasons for discontinuation of studies and validates the fact that the worsening of the financial situation of students was the main reason for discontinuation of studies and therefore leading to the fall in student figures for 2008.

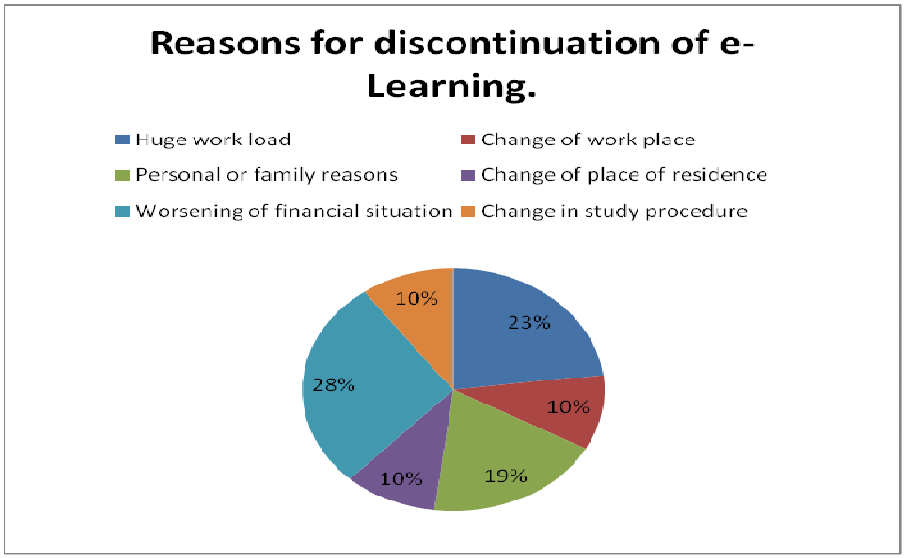


Fig. 2. Reasons for discontinuation of e-Learning.

The Fig.3. analyses the distribution of students by study year to ascertain the impact of emigration abroad and the economic crisis on the commencement of studies at various stages of studies.

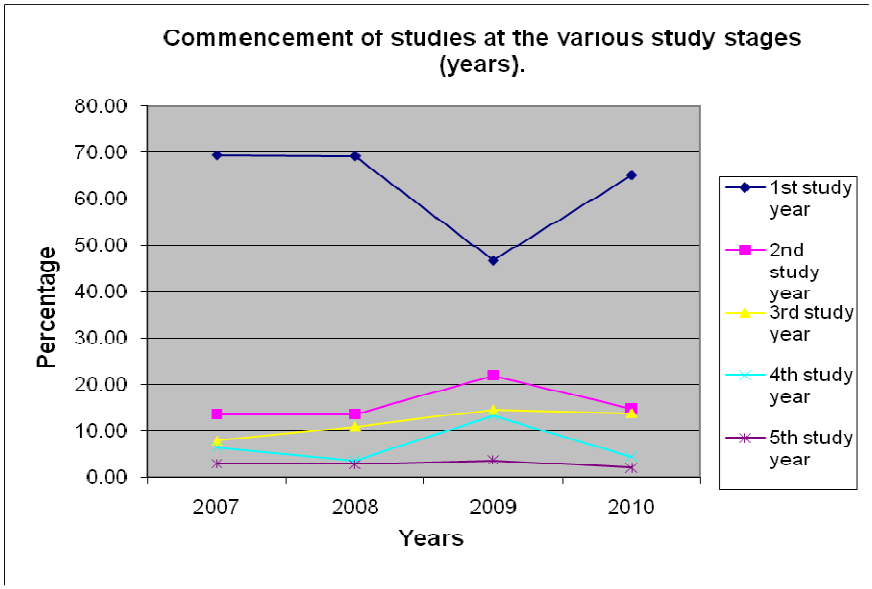


Fig. 3. Commencement of studies at the various study stages (years).

It can be seen that although the number of students in 2009 almost reached the pre crisis level, the number of students commencing studies in the first study year considerably decreased and the number of students in the 2nd, 3rd and 4th study years increased. If before the economic crisis in 2007 majority of the students (70%) started studies in the 1st study year then starting from 2008 the proportion of these students started decreasing and the number of students starting studies in the

2nd, 3rd and 4th study years increased. It can be explained by the fact that part of the students came over from traditional forms of studies to e-Learning enabling them to continue their studies while living and working abroad as can be seen from the information depicted in Fig. 4. The Fig. 4 shows the reasons for the choice of e-Learning as an appropriate form of studies.

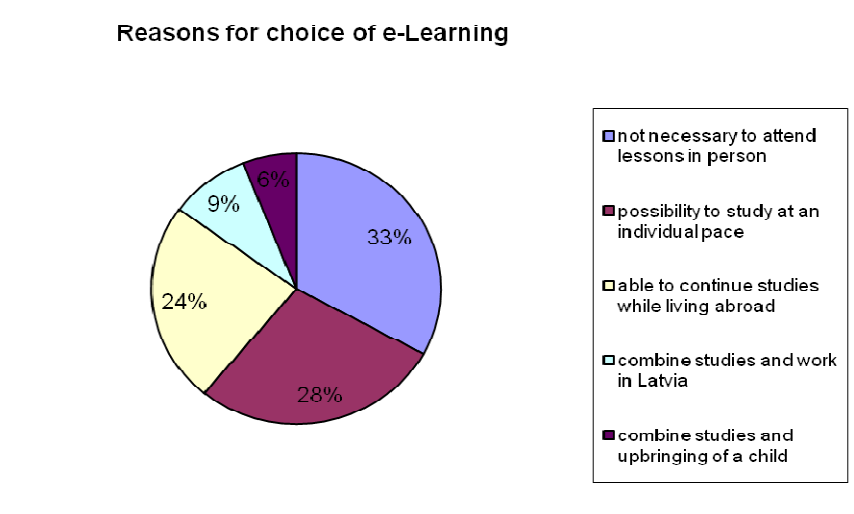


Fig.4. Reasons for choice of e-Learning.

As can be seen only 9% of students had opted for e-Learning in order to combine studies and work in Latvia. After the opening of labour markets and under the impact of the economic crisis the commencement of studies at various study stages has changed.

Results and Discussion

Summarising the theoretical and practical results of the research it can be said that the opportunities offered by e-Learning are yet to be exploited fully in Latvia in comparison to other European countries. There is a lack of goal oriented organisation and development of e-Learning and management policy in Latvia. There is also a lack of information of this form of studies as a comprehensive form of obtaining education. Nevertheless despite the drawbacks mentioned, as can be seen from the results of the practical research under present economic circumstances the demand for acquiring education through e-Learning is on the increase.

Conclusions

The analysis of literature sources and the research carried out shows that:

1. Distance learning or e-Learning is considered to be one of the effective means of education and further qualification of individuals in Europe;
2. Distance learning started in Latvia in the 90's of the 20th century and is considered to be an innovative form of education;
3. In contrast to Germany there is a lack of unified system of organisation, development and administration of e-Learning in Latvia as a result of which the quality of methodological learning materials, their content and organisation of studies in various education and training institutions differ;
4. The demand for e-Learning has increased under the impact of the economic crisis and free labour market;
5. The main reasons for the choice of e-Learning is the opportunity of studying without attending lessons in person at an individual pace at the same time combining studies with work while living abroad.

References

1. Mayer, P., Seufert, S. (2002). Fachlexikon e-learning.
2. Maier, E. (2006) Wegweiser Fernstudium und Fernunterricht, Bundesinstitut für Berufsbildung, Bonn.
3. Sauter, A. M. (2004). Blended Learning. Effiziente integration von E-Learning und Präsenztraining., Auflage.2, Neuwied.
4. Wiepcke, C. (2006). Computergestützte Lernkonzepte und deren Evalution in der Weiterbildung. Blended Learning zur Förderung von Gender mainstreaming. Auflage 1 Kovac.
5. Kristovska I., Ivanova, I. (2002). Open and Distance Learning in Latvia. Towards Virtualization: Open and Distance Learning. - New Delhi : Kogan Page, 375-389.
6. Kristovska, I. (2005). Tālmācības studiju atbalsta sistēmas pārvaldība pieaugušo kompetenču pilnveidošanās procesā. LU Promocijas darba kopsavilkums, Rīga.
7. Mangale, A. (2006). Mūžizglītība un E-tehnoloģijas, "Neatkarīgā Rīta avīze", Rīga.
8. Position paper on distance learning in Europe (1991). [Tiešsaiste]. Skatīts 27. 04.2011. http://scholar.google.lv.
9. Fernstudium Rundschau. (2011), [tiešsaiste]. [Skatīts 02.03.2011] http://foontic.net/www.fernstudium-rundschau.de}.
10. Izglītības likums. (1999), [tiešsaiste]. [Skatīts 19.03.2011] http://www.likumi.lv/doc.php?id=50759.
11. Kokina, L. (2009). E-studijas- kas tas ir?,LV.LV., 19.03.2009. [tiešsaite]. [Skatīts 10.02.20] http://www.prakse.lv/consultative/advice/id/128.
12. Matisāne, I. (2010). Latvijā iespējams iegūt pamata un vidējo izglītību tālmācībā. LV.LV 01.06.2010., [tiešsaite]. [Skatīts 14.01.2011.] http://lv.lv/?menu=doc&id=211061.
13. Fernstudium. (2011), [tiešsaiste]. [Skatīts 23.02.2011] http://www.studentenpilot.de/studium/fernstudium.
14. Study at the OU (2011), [tiešsaiste]. [Skatīts 02. 03. 2011] http://www3.open.ac.uk/study/.
15. Forum Distanc E-Learning (2010), [tiešsaiste]. [Skatīts 10.01.2011] http://www.forum-distance-learning.de/fdl_home.htm.
16. Fernunterrichtsstatistik (2011), [tiešsaiste]. [Skatīts 10.02.2011] http://www.forum-distance-learning.de/fdl_3fa8cd6be43e.htm.
17. Fernstudium – infos.de (2011), [tiešsaiste]. [Skatīts 10. 02. 2011] http://www.fernstudium-infos.de/presse-infos/.
18. Noderīgas saites. (2011), [tiešsaiste]. [Skatīts 14.02.2011] http://estudijas.rtu.lv/?cat=19.

BARRIERS FOR THE USE OF THE TRADITIONAL TRAINING EVALUATION APPROACH IN ENTERPRISE

Signe Enkuzena, Mag psych, PhD student, Banku Augstskola,
Rožu street 9, Baldone, signe103@inbox.lv, +37128630044

Abstract: The need for training evaluation has never been more important than today when economic condition pressures businesses to carefully consider each investment. Why do companies continue to evaluate employee training incompletely or even there is no training evaluation at all?
In the present paper the author briefly discuses the traditional training evaluation model and methods and indicates what barriers T&D practitioners face when evaluating training. The paper also explains and searches for the reasons of training evaluation vacuum. The author offers ways to reduce barriers in training evaluation.
The aim of the paper is to discover what the barriers to use traditional training evaluation models in an enterprise are.
The objectives of the paper are:
1) To find out the current situation of training evaluation practice in enterprises;
2) To identify the differences between the theory and practice in training evaluation;
3) To describe the reasons why the gap between theory and practice is so big.
The methodological framework is based on the review of the latest literature.
Findings: The complexity of learning, inadequate evaluation methods and organizational barriers are only few reasons of weaknesses in current training evaluation processes. Training evaluation should not have a universal approach; each case requires its own individual approach. Being aware of and understanding the reasons of barriers in training evaluation, HRM practitioners will be able to act critically to further improve the credibility of the training evaluation.
The Originality/value: The number and king of training evaluation barriers identified is valuable for HRM professionals. This is the first step to bridge the gap between academic research and practitioners' needs.
Key words: Training evaluation, barriers to evaluate training, evaluation models and methods

Introduction

At present, when most enterprises in Latvia are fighting for survival, it is important to evaluate the yield of every Lats invested in the development of the enterprise. Companies are carefully following their budgets and calculating the yield from the investment. A difficult task is to evaluate yield from the funds invested in the development of human resources because the result is not always immediate and it cannot always be transferred into monetary units. One of the ways how to develop human resources is employee training. LBKA and LPVA evaluation approves that money is still being saved by reducing the training budget. 50% of the respondents indicate that the training budget continues to decline also in 2011. (Latvijas Biznesa konsultantu asociācija, 2011).

However, strategically planned and managed human resource development allows the organization to combine different knowledge elements (previous and new, internal and external knowledge) and create the competitive advantage that ensures the sustainable development of the organization. Therefore it is so important for personnel managers or other staff responsible for HR training and development to evaluate employee training and find proof and reasons that training expenses are justified and that employee "training turns into investment, not a cost structure" in the company operations (Strategic Human Resource Management, 2001). Thus, training evaluation is a critical tool that proves the need to invest in human capital. It is important to clarify what the author

means with the concept of evaluation in this paper. Although databases contain several thousands of research papers about training evaluation, only a few of the authors offer a complete definition of training evaluation. One of the clearest and most complete explanations is Pilar Pineda's explanation of training evaluation, "The evaluation of training in organizations is the analysis of the total value of a training system or action in both social and financial terms, in order to obtain information on the achievement of its objectives and the overall cost-benefit ratio of training, which in turn guides decision-making." (Pineda, 2010, p.674.)

Methodology

Scientific research publications about the need for evaluating training in companies, the methods and tools of evaluation are available from the sixties of the previous century. A pioneer in training evaluation is Donald L. Kirkpatrick and his training evaluation hierarchy model, which offers a framework for evaluation of the training results and the organisational process by using four levels (Kirkpatrick, 1994).

At Level 1 of training evaluation - **Reaction** – the trainees' reaction to the training process is evaluated; at Level 2 - **Learning** - to what extent the trainees obtain knowledge and skills; at Level 3 - **Behaviour** – the ability of the trainees to demonstrate the acquired skills is measured; and the highest training evaluation level - Level 4 - **Result –** reveals what the impact at the company operational level is, measuring it in such units as money, effectiveness etc. The works of Donald L. Kirkpatrick and his followers analyse in detail the training evaluation at all four levels (Clark, 2008).

This model was created in 1959, but despite its respectable age and received criticism, 2/3 of the authors still refer to this approach in training evaluation.

A number of scientists and practitioners have developed further and improved the training evaluation model (Warr et al., 1970; Hamblin, 1974; Cannon-Bowers et al., 1995; Kaufman et al., 1995; Molenda et al., 1996; Phillips, 1997, 2003; Cascio, 1999; Tyler, 2002), as well as criticised it (Clement, 1982; Alliger and Janak, 1989; Tannenbaum and Woods, 1992; Brown, 2005; Sitzmann et al., 2008, Holton, 1996)

At the end of the previous century scientists developed several integrated models that combine response to the criticism of Kirkpatrick's model and improvements to it, thus creating a universal approach to training evaluation: Integrated model (Pineda, 2010), Four-phase or Double loop approach (Lingham et al., 2006), CIRO (context, input, reaction, outcome) model (Warr et al., 1970), CIPP (context, input, process, product) model (Worthen and Sanders, 1987), IPO (input,

process, output, outcome) model (Bushnell,1990) and TVS (training validation system) approach (Fitz-Enz, 1994).

Several methods and tools have been developed for the companies to implement the training evaluation models in real life. These methods and tools are different for each training evaluation level, regarding the evaluation of both the content of training programmes (Grammatikopoulos et al., 2004) and the process (Darby, 2007).

However, despite the wide range of scientific literature about evaluation training, as well as the available diverse training evaluation instruments, only a few enterprises evaluate knowledge until Level 4. Training evaluation at all levels takes place in relatively few cases. Poor application of the evaluation model in practice is approved by relatively low percent indicators about enterprises that evaluate training until Level 4: 15% according to Dixon (1990), 20% are indicated by Shelton and Alliger (1993), 31% is identified by Olsen (1998), 2% are found by Pershing and Pershing (2001) and Lee and Pershing (2002). The CVTS-2 survey indicates that the status of training evaluation is very similar all over Europe. It is noted that seven out of ten companies evaluate some aspect of training: however, the percentages decrease when it comes to evaluating the training results and application to the workplace, which occurs in only two out of every ten businesses (Pineda, 2010, p.674-675).

Having stated the fact that only few enterprises evaluate training to define the real value of training a question arises - ***what are the barriers to use traditional training evaluation models in an enterprise?***

The author analysed the available scientific literature. Trying to find answers to the research question, a lot of effort had to be exhibited because in difference from the huge amount of information about how to evaluate training, the answers to the question why it does not follow the theoretical models were rather simplified and without justification. A deeper analysis of the reasons why training is not evaluated can be found only in the works of some authors.

Results

One of the problems that T & D professionals meet at their work is an ever-increasing difficulty to define the relation between training and its result. When training is over, until the moment someone acts to find out what new knowledge and experience are created or what behaviour has changed since the training, a vacuum appears. Tom Short uses an innovative term “evaluation vacuum”, which describes conceptual differences existing somewhere between the actual training activity and being aware of the benefit arising from the training. Results of three

case studies in the industry sector of New Zealand and focus group discussions in which independent senior human resource practitioners participated serve as a proof for reality with significant qualitative and contextual changes in the environment where enterprises in the 21st century learn and train their staff. Tom Short mentions nine factors that, to his mind, affect the evaluation vacuum (Short, 2009).

Which moment is the most appropriate to evaluate training when it ends? There are different theoretical arguments and sometimes they are contradictory, but delay in time creates difficulties for trainees to offer meaningful and precise information. People's memories fade away and there may appear difficulties to show direct relation between training and considerable changes in performance. Research findings among front-line managers indicated that ***pressure of the work and lack of time*** are the main reasons why training evaluation does not receive the necessary attention.

In his taxonomy of learning Bloom indicated (Bloom et al., 1956) that it is simpler to evaluate training the goal of which is transferring knowledge and skills than training on solving complicated problems or conceptual training. For example, it is more complicated to evaluate benefits from training about changes in organizational culture than to evaluate simple skills acquisition training. When evaluating training a rich scope of data is developed, but it is possible to state a significant and credible lack of proof at the strategic level about investment in training and development (Short, 2008). Thus, one more reason for training evaluation vacuum is the fact that training can be different and **the type and instruments of training evaluation can vary** from the context of the particular training.

Present life requires organizations to learn continuously. A learning organization is characterised by several simultaneous training initiatives, thus creating additional complications for training evaluation. Integrated training projects make training evaluation a challenge. As a result of implementing several training projects "learning bleed" is created. Implementation of several training projects simultaneously in the enterprise ensures stable basis for development, but it also requires special investment in training evaluation and it is difficult to calculate yield from the training. More and more segmented business units in organizations implement different training projects to improve entrepreneurship. Such a strategy creates bigger potential for "learning bleed", making the evaluation process even more complicated. Thus evaluation activities become sporadic, creating a tendency not to evaluate those projects where the assumption exists that they offer less benefits. Such a strategy creates a high risk because, without credible information, managers cannot know which project should be terminated.

Not seeing the possibility to express the training result in monetary units, training evaluation is rejected because the qualitative approach to training evaluation requires much more time and usage of mixed evaluation methods. The choice of the philosophical paradigm significantly affects what is expected from training evaluation. People that prefer an objective approach rely on numeric and factual information. If we rely on this approach in training evaluation, it requires direct observation, analysis and data. In the past it was considered that skills training offers these results. But, on the other hand, in the qualitative evaluation, socially constructed information often exists and it is aimed at the importance of present events in the future development. Qualitative evaluation requires deeper interpretation and that is a process that requires time, e.g. training that is implemented as a means to change organizational culture and to improve organization's operations long-term (OP). In these cases it is very easy to refuse from a qualitative approach to training evaluation because very long time is necessary for collecting information. To analyse such complicated information to evaluate the performance of the organization mixed methods approach to data acquisition should be used, such as small-scale surveys, training reaction sheets, complemented with focus groups and climate surveys. Today not only rational financial considerations should be taken into consideration when evaluating training, but also the social aspect, which cannot always be expressed in monetary units. The increase of the importance of social aspects in the training process in enterprises makes to review critically the assumption that the real value of training can be only if the training benefit is expressed in monetary units.

The number of training participants creates barriers in training evaluation – the larger the number of trainees, the larger barrier in training evaluation it is. It is much simpler to evaluate training outcomes for one person than for the entire company team. A smaller number of trainees requires a smaller evaluation capacity. "Case study evidence indicates that small-scale evaluations are more likely to happen than major organisational projects, yet evaluating single-event activities is thought to have less influence on determining strategic success – unless the individuals are senior managers, whose learning and performance affect the entire organization" (Short, 2009, 17).

A not precisely defined training goal is a barrier in training evaluation. Defining precise learning outcomes nowadays is a big challenge. As practice shows, when planning training, the enterprise or the training provider not always strictly defines the training goal. The training goal can be vague, not precisely defined or each of the parties involved in the training may have their own understanding about it. Defining general goals, e.g. obtaining or extending knowledge, creates a

potential for “learning bleed”. The more precisely the goals are defined for individual and group training, the more possibilities to determine what has to be done to evaluate training.

Information produced by third parties creates a false impression that training is evaluated, but in reality it has not happened. For example, if top managers are convinced that the organization has an open and fair culture, they may impact the evaluation with demonstrating their conviction. Political and egoistic interests may overshadow the evaluation results, as well as past events may create Halo or a barrier effect when evaluating training.

A wide range of training themes and planned outcome hinders training evaluation. Sometimes the list of planned outcomes is so long that it is impossible to evaluate it regarding the course objectives. When evaluating training, the training course developers should cooperate to determine the real training needs and the planned outcome.

There are difficulties to separate personnel training from tactical training and expanding experience. It is seldom when training can be distinguished as a separate issue in organizations. Nowadays organizations, as well as people learn continuously. The learning process does not have strict limits in time and space. With the development of new technologies, an employee can acquire a lot through self-learning, knowledge and skills are obtained working together with a more experienced colleague, learning by doing is also a typical practice. It is almost impossible to separate and measure a specific benefit from separate employee training because several types of training merge and impact the total result.

Blaming T&D practitioners and company owners of incompetence or saving money resources is the most frequently mentioned reason why the real value of training is not evaluated. It has to be admitted that such a statement is logical but it is a too simplified approach to searching for the real reasons. Saying that practitioners are incompetent, scientists avoid critical evaluation of the existing models. Antonio Griangreco has a different approach to explaining why training is not evaluated. His main idea is that the reason is not incompetence or lack of money resources but the fact that ***the evaluation model is outdated and not appropriate for the needs of the organization of the 21st century***. Modern society and economic infrastructure very much differ from the ones when Kirkpatrick developed his model. New technologies and social emancipation assign a more significant role to the individual if compared with the 60-ies of the previous century (Friedman, 2005). New terms characterise economics, such as e-lace economy (Malone and Laubacher, 1998), knowledge economy and post-industrial economy (Sculley and Byrne, 1987). In this fast-changing world the individual is required to learn continuously, as well as organizations are required to become learning organizations (Senge, 1990). Learning and training are a key to survival, but are

the traditional evaluation types significant and appropriate? "The effects on training, its meaning and its evaluation of the societal changes that continue to emerge largely have been ignored by the research community. Yet practitioners likely have incorporated these changes into their modus operandi, without reconsideration of the reasons and the impact of their decisions." Practice approves that most of the organizations evaluate training at the Level 1 – Reaction. However, irrespective of that, it is not a surprise that the number of publications that would seriously explain training evaluation at Level 1 is very small. "The choice not to use higher-level evaluations is not associated with positive reflective skills but rather with negative and lesser capabilities. Companies do not do more because they do not have the skills or money or because they do not understand the model." (Griangreco et.al., 2010, 169) (Griangreco et.al., 2010,163).

The present, little criticised ***universal approach is one of the most significant barriers in training evaluation***. Many authors have tried to create universal models that could be applied to any enterprise evaluating training of any type and goal, but when the specifics of the training in the organization and the trainees is not taken into consideration, training evaluation in the organization is formal.

In the traditional training evaluation models ***evaluation of the training process and the training results is not separated***. To reduce barriers in training evaluation, the evaluation of the training process – training goal, correspondence of training to the company needs, content of the training programme, training methods, trainer's professionalism, training facilities and venue have to be evaluated separately from the training result. As the case study in retail store chain approves, the training process and training results may have different evaluation (Enkuzena, 2011). It disproves the traditional opinion that training evaluation at one level affects training evaluation at the following levels (Clarck, 2008).

As it was already mentioned above, most of the enterprises finish training evaluation with measuring the trainees' reaction because studying trainees' reaction has clear goals and tools, and it is also possible to clearly separate trainees' reaction to particular training. Research of trainees' reaction, or Level 1 of Kirkpatrick's model, is the only stage in training evaluation according to traditional methods the result of which one can be safe. Taking into account how widely the research of trainees' reaction is used, it offers a large potential, which not always means that evaluation of reaction is sufficient to evaluate skills, but rather that in some contexts it represents an acceptable and enriching solution. Despite this potential, journals are not willing yet to publish research aimed only at researching the trainees' reaction.

Discussion

Reviewing the above listed reasons for not evaluating training, it can be observed that the reason is mainly related to unsuccessful attempts of T&D practitioners to apply traditional training evaluation models and methods to the evaluation of training processes in a modern enterprise – the enterprise and the employees are continuously learning, training overlaps, the training process has to be separated from the learning outcome and it has to be understood what exactly should be evaluated in each particular case, the training result and goal can be different for the stakeholders involved in the training process.

The need to distinguish the learning effect at four different levels becomes less significant in the post-industrial economics because the content of training is already such that it undeniably works on changes at all levels. Changing of the traditional model, in fact, means moving away from evaluation of cause-effect relationship or even liquidating evaluation levels (Giangreco et al., 2010). To evaluate training in a modern enterprise it is necessary to develop a qualitatively new approach where the value of training evaluation is not universal but it is a part of the training goal, which is different for each of the stakeholders. Training value and costs is a difficult issue that requires a special approach that is modified from one case to another. Evaluation cannot be considered linear (as it is evaluated by many practitioners – a direct relation between costs and the result). Nowadays situation requires saving resources, therefore different training evaluation strategies should be chosen for different training (Tannenbaum and Woods, 1992, p. 68).

Evaluation of the training content should be separated from the evaluation of the training process. In the modern enterprise one and the same method and group cannot be used to evaluate various training groups because their reaction and expectations depend on the training initiator (e.g. the direct supervisor). When evaluating training, it is necessary to evaluate how training facilitates the performance of the enterprise and the employees (Brinkerhoff, 2003), not to evaluate training per se.

A modern enterprise and the need to change the approach to training evaluation in it have facilitated a debate also among researchers. To develop a topical and convenient method/model/approach of training evaluation, useful for the organization, it is necessary to carefully study the practice of present enterprises in training evaluation: reasons for both training and its evaluation in relation with the concept of post-industrial economics (Giangreco et al, 2010).

Why are employees sent to training? What does the employee gain from the training? Does the training help to keep the employee in the enterprise? Does the training evaluation contain

attaining of organizational goals or sense-making for employees? What measures are significant in the modern world?

Refusing from the deterministic model in training evaluation a direction to reflective approaches should be taken as they are typical for post-industrial economics in which the existing training evaluation model would become only one of many tools, where, for example, "not-evaluation" can be as effective as formal Level 4 evaluation.

To develop a new approach to training evaluation and to avoid the present universal approach, a number of practical researches should be performed. Griangreco indicates to the need to base this research on four elements of interest – the size of the enterprise, the type of the trainee audience, the training content and the legal framework (Griangreco et al, 2010). Research of training evaluation in SMEs could provide a significant value added because these enterprises possess limited resources and these enterprises are more clearly aware of the relation between the result and training than large enterprises are. Training that is aimed at different categories of trade require individual approach to evaluation. For example, training can be a means to motivate and keep the employee. It is characteristic to post-industrial organizations and the training itself, in fact, is evaluated together with the evaluation of trainees' reaction.

Conclusions

1. The main barriers mentioned in literature why enterprises do not evaluate training are insufficient knowledge of T&D specialists, lack of time and money resources, not separating the training process and training results in the training evaluation, large number of training participants, not precisely defined training goals, information produced by third parties, a wide range of training themes and planned outcomes and "learning bleed".
2. Analysing the reasons why training is not evaluated, the author concludes that the traditional approach to training evaluation does not correspond to the needs of a modern enterprise because it is impossible to use linear and separable training evaluation methods and approaches in the dynamic and changing environment.
3. To have a full-fledged evaluation of employee training and to obtain proof and justification that training is investment in the development of an enterprise, a new approach to training evaluation should be searched for so that it would correspond to the processes taking place in the modern economic environment.
4. The new approach to training evaluation should be based on the research of practical experience. When studying and summarising the practice of training evaluation of different

goals and content in the enterprises of different size, for different positions and in different countries a sufficient amount of information is collected, it will be possible to speak about the development of a qualitatively different training evaluation model, suitable for the needs of the enterprise functioning in post-industrial economics.

References:

1. Alliger, G.M. and Janak, E.A. (1989). Kirkpatrick's levels of training criteria: 30 years later //Personnel Psychology, Vol. 42, pp. 331-42.
2. Bloom, B., Englehart, M., Furst, E., Hill, W. and Krathwohl, D. (1956), Taxonomy of Educational Objectives: The Classification of Educational Goals. Handbook I: Cognitive Domain, Longmans, Green,New York, Toronto.
3. Brinkerhoff, R.O. (2003). The Success Case Method, Berrett-Koehler, San Francisco, CA.
4. Brown, K.G. (2005). An examination of the structure and nomological network of trainee reactions: a closer look at 'smile sheets // Journal of Applied Psychology, Vol. 90 No. 5, pp. 991-1001.
5. Bushnell, D.S. (1990). Input, process, output: a model for evaluating training // Training and Development Journal, Vol. 44 No. 3, pp. 41-3.
6. Cannon-Bowers, J.A., Salas, E., Tannenbaum, S.I. and Mathieu, J.E. (1995). Toward theoretically based principles of training effectiveness: a model and initial empirical investigation // Military Psychology, Vol. 7, pp. 141-64.
7. Cascio, W.F. (1999). Costing Human Resources: the Financial Impact of Behaviour in Organizations, 4th ed., Kent Publishing, Boston, MA.
8. Clark, D. R. (2008), „Kirkpatrick's Four-Level Training Evaluation Model", available at: http://www.nwlink.com/~donclark/hrd/isd/kirkpatrick.html (assessed 20 February 2011)
9. Clement, R.W. (1982). Testing the hierarchy theory of training evaluation: an expanded role for trainee reactions // Public Personnel Management Journal, pp. 176-84.
10. Dixon, N.M. (1990).The relationship between trainee responses on participant reaction forms and posttest scores, Human Resources Development Quarterly, Vol. 1 No. 2, pp. 129-37.
11. Darby, J.A. (2007). Open-ended course evaluations: a response rate problem? //Journal of European Industrial Training, Vol. 31 No. 5, pp. 402-412
12. Enkuzena, S. (2011). Management training - does it help to decrease the consequences of socio-economic crisis? A case study of a retail store chain. Proceedings of the conference: MANAGEMENT HORIZONS IN CHANGING ECONOMIC ENVIRONMENT: VISIONS AND CHALLENGES,(22.-24.09.2011), Kaunas, Lithuania
13. Friedman, T.L. (2005). The World is flat: A Brief History of the 21st Century, Farrar, Straus and Giroux, New York, NY.
14. Fitz-Enz, J. (1994). Yes . . . you can weigh training's value // Training, Vol. 31 No. 7, pp. 54-8.
15. Giangreco, A., Carugati, A., Sebastiano, A. (2010). Are we doing the right thing? Food for thought on training evaluation and its context // Personnel Review, Vol. 39 No. 2, pp. 162-177.
16. Grammatikopoulos, V., Papacharisis, V., Koustelios, A., Tsigilis, N., Theodorakis, Y. (2004). Evaluation of the training program for Greek Olympic education // International Journal of Educational Management, Vol. 18 No. 1, pp. 66-73.
17. Hamblin, A.C. (1974). Evaluation and Control of Training. McGraw-Hill, New York, NY.
18. Holton, F.H. (1996).The flawed four-level evaluation model // Human Resources Development Quarterly, Vol. 7 No. 1, pp. 5-20.
19. Kaufman, R., Keller, J. and Watkins, R. (1995). What works and what doesn't: evaluation beyond Kirkpatrick // Performance & Instructions, Vol. 35 No. 2, pp. 8-12.
20. Kirkpatrick, Donald L. (1994).Evaluating Training Programs: the Four Levels. San Francisco: Berrett-Koehler Publishers
21. Latvijas Biznesa Konsultantu Asociācija (2010). *Personāla vadības loma un aktuālie uzdevumi organizācijā.* Survay, available at: *http://www.lbka.lv/?sub=news&id=125* (accessed 02 May 2011).
22. Lingham, T., Richley, B., Rezania, D. (2006). An evaluation system for training programs: a case study using a four-phase approach // Career Development International, Vol. 11 Iss: 4, pp.334 – 351.
23. Malone, T.W. and Laubacher, R.J. (1998).The dawn of the e-Lance economy // Harvard Business Review, Vol. 76 No. 5, pp. 144-52.

24. Molenda, M., Pershing, J.R. and Reigeluth, C.M. (1996). Designing instructional systems, ed. Craig, R.L. The ASTD Training and Development Handbook: a Guide to Human Resource Development, McGraw-Hill, New York, NY.
25. Olsen, J.H. (1998).The evaluation and enhancement of training transfer // International Journal of Training and Development, Vol. 2 No. 1, pp. 61-75.
26. Pershing, J.A. and Pershing, J.L. (2001).Ineffective reaction evaluation // Human Resources Development Quarterly, Vol. 12 No. 1, pp. 73-90.
27. Phillips, J.J. (1997). Handbook of Training Evaluation and Measurement Methods, Gulf Publishing, Houston, TX.
28. Pineda, P. (2010). Evaluation of training in organizations: a proposal for an integrated model // Journal of European Industrial Training, Vol. 34 No. 7, 2010, pp. 673-693
29. Tyler, K. (2002). Evaluating evaluations //HRM Magazine, June, pp. 85-93.
30. Shelton, S. and Alliger, G. (1993). Who's afraid of level 4 evaluation? A practical approach // Training & Development, June, pp. 43-6.
31. Short, T. (2009). Exploring the vacuum in training evaluation: is this a case of mission impossible?//Development and learning in organizations, Vol. 23 No. 5, pp. 15-18
32. Short, T. (2008). Strategic alignment and learning in human resource development: a hermeneutic exploration, PhD thesis, University of South Australia, Adelaide.
33. Sitzmann, T., Brown, K.G., Casper, W.J., Ely, K. and Zimmerman, R.D. (2008). A review and meta-analysis of the nomological network of trainee reactions // Journal of Applied Psychology.
34. Sculley, J. and Byrne, J.A. (1987). Odyssey. Pepsi to Apple . . . A Journey of Adventure, Ideas, and the Future, Harper & Row, New York, NY.
35. Senge, P.M. (1990). The Fifth Discipline: The Art and Practice of the Learning Organization, Century, London.
36. Strategic Human Resource Management (2001), in Greer, C. R.(Ed) Prentice-Hall, Inc. A Pearson Education Company Upper Saddle River, New Jersey,pp.14.-32.
37. Tannenbaum, S.I. and Woods, S.B. (1992). Determining a strategy for evaluating training: operating within organizational constraints // Human Resources Planning, Vol. 15 No. 2, pp. 63-81.
38. Warr, P., Bird, M. and Rackham, N. (1970). Evaluation of Management Training: a Practical Framework with Cases, for Evaluating Training Needs and Results, Gower, London.
39. Worthen, B.R. and Sanders, J.R. (1987). Educational Evaluation, Longman, New York, NY.

INOVATĪVA PILSĒTA – TERITORIJU ATTĪSTĪBAS VEICINĀTĀJA

INNOVATIVE CITY – PROMOTER OF TERRITORY DEVELOPMENT

Inese Haite
Mg.soc.sc., Ph.D. Student, study program "Economics", University of Daugavpils,
Vienības street 13, Daugavpils, Latvia, LV5401
inesehaite@inbox.lv, inesehaite@hotmail.com, phone +371 29400511

Abstract. There are several reasons why the sustainable development of territories is delayed. The lack of local strategies, insufficient cooperation in the planning of economy development and territory use, weak cooperation of the social and employment sectors can be regarded as obstacles for the comprehensive development of territories. Restricted thinking and attitudes regarding possible development, growth and quality, which establishes lack of activities in innovation culture, creativity and entrepreneurship, can be mentioned as one of the main reasons of the above mentioned problem. For the sustainable development of territories in the European Union there are several types of challenges – demographical and climate changes, mobility of cities, degraded territories and global competitiveness. New challenges are implemented within the framework of limited public sector finances, which are followed by several economic crashes. Nevertheless, society seeks for solutions in order to initiate and continue changes. Latvia is currently implementing new concept of territory development, which are directed towards the establishment of the pre-conditions for the increase of competitiveness. The priority „Polycentric development" established by the initiative of European Commission and co-financed by the European Regional Development Fund can be regarded also as one of the instruments for the promotion of city development. Activities provided within the framework of this program are directed towards the promotion of territory development in cities and supporting different innovative investments. Initiated investments expand to innovative solution of development problems. It is predicted the suggested initiative will allow cities to underline and strengthen their specific potential of development, as well as supplement the acting profiles chosen by other cities. Initiating the development of a sustainable city net, the strongest development centres have been defined – they can significantly advance the increase of competitiveness, promote its economic capacity and improve the quality of life.
Keywords: Urban, Rural, and Regional Economics. Planning Models. Planning Policy.

Ievads

Raksta mērķis ir izpētīt inovatīvas pilsētas specifiku ilgtspējīgas izaugsmes kontekstā, kā arī raksturot jaunākās tendences policentrisko projektu ieviešanas jomā Latvijā. Raksta uzdevumi ir izpētīt ilgtspējīgās izaugsmes un inovatīvas pilsētas jēdzienus, kā arī noskaidrot aktualitātes un identificēt rezultātus inovatīvu infrastruktūras ieguldījumu jomā, kas vērsti uz Latvijas pilsētu teritoriju attīstību.

Pētījuma metodes

Raksta izstrādes gaitā ir pielietotas monogrāfiskā, grafiskā loģiski konstruktīvā un zinātniskās sintēzes metodes.

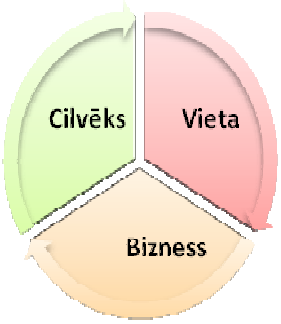
Rezultāti un diskusija

Izpratne par ilgtspējīgo izaugsmi un inovatīvu pilsētu

Pastāv dažādas ilgtspējīgās izaugsmes definīcijas. Pasaules Banka ir definējusi ilgtspējīgu izaugsmi sekojoši: „Aktīvu portfeļa pārvaldības process, lai saglabātu un palielinātu cilvēku izaugsmes iespējas. Ilgtspējīga attīstība ietver ekonomikas, vides un sabiedrības ilgtspējību, kuru var sasniegt, racionāli pārvaldot fizisko, dabas un cilvēku kapitālu." (Tatyana P. Soubbotina, The World Bank, 2000). Izpratne par ilgtspējīgu izaugsmi Eiropas Savienībā (ES) ir mainījusies laika gaitā, nākotnes redzējums ir iekļauts 2010.gada 17.jūnijā apstiprinātajā dokumentā, kas ir „Eiropa 2020: stratēģija gudrai, ilgtspējīgai un iekļaujošai izaugsmei" („ES 2020" stratēģija). ES izaugsmes stratēģijā nākamajai desmitgadei "Eiropa 2020" kā vienu no prioritātēm ir definējusi ilgtspējīgu izaugsmi, kas ir resursu ziņā efektīvāka, videi nekaitīgāka un konkurētspējīgāka ekonomikai. ES izpratnē ilgtspējīgā izaugsme nozīmē (European Commission, 2010):

1) izveidot konkurētspējīgāku ekonomiku, kurā resursus izmantotu efektīvi un ilgtspējīgi, bet oglekļa dioksīda emisija būtu pēc iespējas zemāka, kā arī aizsargāt vidi un novērst bioloģiskās daudzveidības izzušanu,
2) nostiprināt Eiropas līderpozīcijas, izstrādājot jaunas ekoloģiskas tehnoloģijas un ražošanas metodes,
3) izveidot efektīvus viedos elektrotīklus,
4) izmantot ES mēroga tīklus, lai uzņēmumi (īpaši mazie ražotāji) iegūtu papildu priekšrocības konkurētspējas ziņā, kā arī uzlabot uzņēmējdarbības vidi, īpaši MVU; palīdzēt patērētājiem novērtēt resursu efektivitāti

Ilgtspējīga izaugsme iekļauj sevī līdzsvaru starp sociālo taisnīgumu, ekoloģisko integritāti un ekonomisko attīstību. Vides, sociālie un ekonomiskie jautājumi ir savstarpēji cieši saistīti un ir jārisina vienoti, neatrauti viens no otra. Ilgtspējīga izaugsme balstās uz vairākiem pamatprincipiem, kas pamatā paredz dzīvi saskaņā ar dabas likumiem un taisnīgu resursu sadali starp sabiedrības pārstāvjiem. Priekšnoteikums integrētas izaugsmes veicināšanā konkrētā teritorijā, tai skaitā pilsētā, tiek bāzēts uz dažādu resursu harmonisku mijiedarbību:



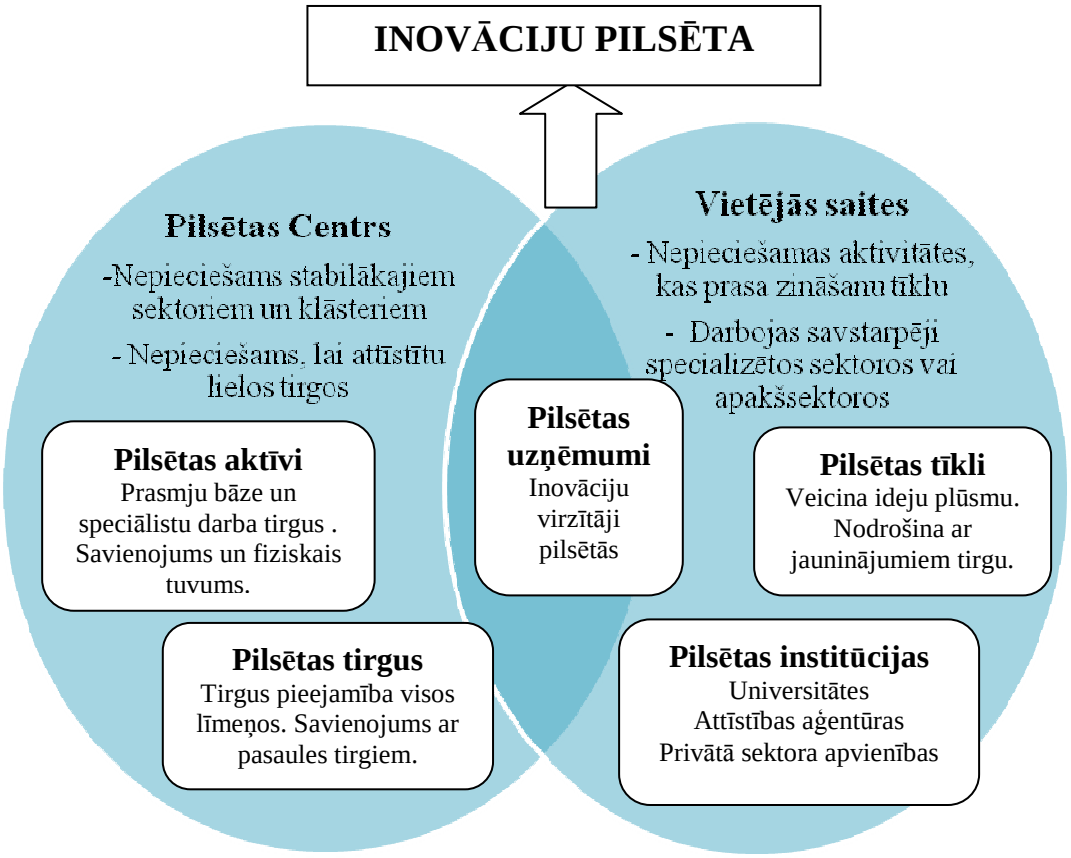
1. attēls. Integrētas izaugsmes resursu mijiedarbības modelis. (Mclnroy N., 2010)

Attēlā norādītie resursi nepārtraukti aktivizējas, radot tiešu vai netiešu ietekmi uz savu vai blakus resursu attīstību vai degradāciju. Resursu sastāvā ir dažādi faktori, kas transformējas reālās darbības: resurss „Cilvēks" iekļauj sevī darbu, prasmes un teorētiskās iemaņas, resurss „Vieta" – teritoriālo stratēģiju, vietas mārketingu, bet resurss „Bizness" satur ekonomiskās aktivitātes attīstības instrumentus. Saskaņā ar šo modeli izaicinājums ir ilgtspējīgas izaugsmes pamatā, jo ekonomiski attīstītās teritorijās (vietas) izveidojas standarts jeb dzīves stils, kas aktivizē biznesu un veido apmierinātības līmeni cilvēkiem.

Inovatīva pilsēta ir kopiena, kas savu izaugsmi balsta uz radošiem resursiem un cilvēku potenciālu, savā attīstībā līdzsvarojot ekonomiku, identitāti un inovāciju. Radoša pilsēta piesaista un patur radošus cilvēkus, kas palīdz pilsētas ekonomikai kļūt inovatīvai un pielāgoties spējīgai mainīgās globālās ekonomikas apstākļiem. Radoša pilsēta uztur dažādu kultūru daudzveidību un atbalsta eksperimentus. Tās sociālais klimats iedrošina cilvēkus izteikt jaunas idejas bez bailēm no cenzūras, iedrošina jaunās idejas ieviest praksē, iedrošina neveiksmes gadījumā mēģināt atkal. Radoša pilsēta ne tikai piesaista cilvēkus, kas ir radoši. Tā dod iespēju cilvēkiem kļūt radošiem un iesaista tos inovācijās, sociālajās un ekonomikas transformācijās, kas nepieciešamas pārejai uz ilgtspējīgāku pilsētas attīstību (Melbārde D., 2008).

Inovācijas ir koncentrētas pilsētās un to tuvumā. Pilsētas vide nodrošina ideālu vidi inovācijām līdz ar to kļūstot par potenciālu inovāciju pilsētu. Dažas pilsētas ir inovatīvākas nekā citas, tas ir atkarīgs no dažādiem faktoriem. Pilsētas ir sarežģītas sistēmas, kas pastāv saistībā ar apkārtējo reģionu, iedzīvotājiem un attiecībām ar citām pilsētām, reģioniem, kā arī ārvalstīm. Turklāt pilsētas pašas reti kļūs par iniciatorēm inovācijām, biežāk inovāciju ierosinātāji ir pilsētu iedzīvotāji, uzņēmumi vai citas organizācijas. No tā izriet, ka pilsētām bieži vien ir jāatbalsta jauninājumi netieši – no dažādam mazām iniciatīvām līdz inovācijas politikas ieviešanai kopumā. Netieši atbalstot inovatīvas domāšanas iznākumus, pilsēta kļūs vidi, kur pieaug un koncentrējas

arvien jauni inovāciju resursi. Šī vide sāk rosināt dažādus izejas procesus sava starpā. Ja pilsēta spēj prasmīgi apvienot esošos resursus, tad viņai ir visas iespējas kļūt par inovāciju pilsētu kopumā.



2. attēls. Inovāciju pilsētas sastāvs un procesi.

(Athey G., Glossop C., Harrison B., Nathan M., Webber C., 2007)

Otrajā attēlā ir atspoguļots pilsētu inovācijas modelis, kas izskaidro, kāpēc inovācija ir koncentrēta pilsētās un to tuvumā. Modelī tiek izmantoti divi bloķēšanas jēdzieni: pilsētas centrs un vietējās saites. Izveidotais modelis atspoguļo reālos procesus, kas notiek pilsētās. Pilsētas piedāvā piekļuvi vietējos un globālos līmeņos. Pilsētas aktīvi ir kritiski, atbalstot uzņēmumu inovatīvo aktivitāti un konkurētspējas izaugsmi. Pilsētās pastāv specializēti darbaspēka resursi, pilsētvides, sakaru un transporta infrastruktūra. Šī vide rosina veikt dažādas darbības. Pilsētās pastāv dažādas lokāla līmeņa un valsts pārvaldes institūcijas, dažādas citas ieinteresētās aprindas dažādu jauninājumu atbalstam. Pilsētu tuvums un savienojamība savā starpā var palīdzēt uzņēmumiem un

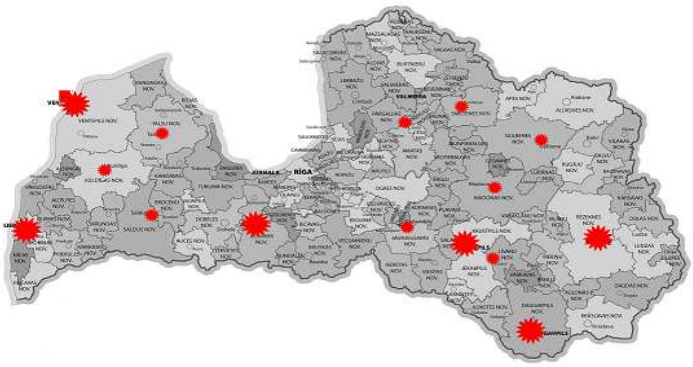
zinātniskajiem tīkliem veidot un palielināt inovatīvu ideju plūsmu. Valsts institūcijas var palīdzēt pārvarēt koordinācijas problēmas, veicinot tīklu uzturēšanu un jaunu tīklojumu rašanos. Pilsētās ar spēcīgiem pilsētu centriem inovācijas ieņem lielu daļu no daudzveidīgā starptautiskā tirgus sektora. Attīstītā infrastruktūra ļauj uzņēmumiem efektīvāk darboties, piekļūstot pie pilsētu iestādēm, lai veiktu darījumus tirgū, sadarboties ar citiem uzņēmumiem, vai dalīties ar idejām. Savukārt pilsētas ar vājiem pilsētu centriem ir relatīvi mazāk iesaistītas attīstītajos tirgos ar vietējām piegāžu ķēdēm, slikti savienotas ar citām pilsētām vai reģioniem. Šajās pilsētās inovāciju specializācija ir šaurāka. Jauninājumu nozarē ir nepieciešama augsta līmeņa zināšanas, šis process prasa spēcīgas vietējās saites. Pilsētās, kur ir vājas pašvaldības saites, ir mazāk blīvi tīkli un nenoturīgas saites starp uzņēmumiem un iestādēm.

Noteiktu apstākļu ietekmē, pašvaldības var kļūt par inovatīvu projektu iniciatoriem. Šādu iniciatīvu ieviešana ir saistīta ar finansiālo resursu (iekšējo vai ārējo) pieejamību. Pašvaldība spēj izveidot vidi, kur satiekas inovatīvi uzskati un transformējas par konkrētām projektu idejām un aktivitātēm. Gadījumā, ja ir pieejami finanšu resursi inovatīvu projektu realizācijai, pašvaldības var izmantot iespēju piesaistīt ārējo finansējumu. Taču atsevišķos gadījumos pašvaldības pat var iniciēt finansējuma pārdales procesus par labu inovatīvo projektu realizācijai.

Latvijas teritoriju ilgtspējīgas attīstības priekšnosacījumu veidošana, inovatīvu projektu attīstība pilsētās

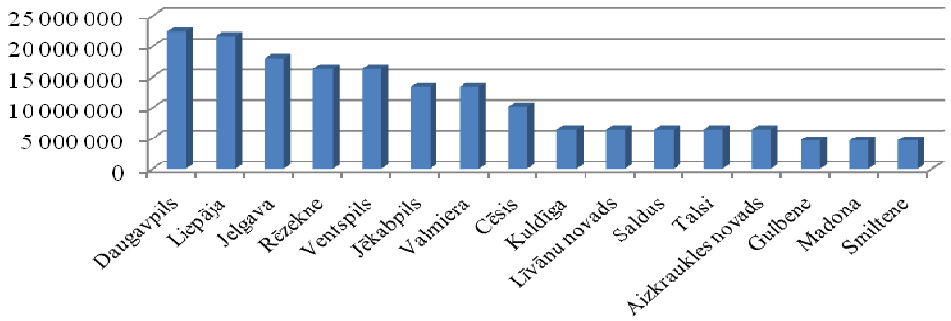
Ekonomiski un radošuma ziņā lielākais Latvijas attīstības centrs ir Rīga. Tās īpatsvars Latvijas iekšzemes kopproduktā ir aptuveni 57%. Rīgas tirgus potenciāls ir ievērojami augstāks nekā citām Latvijas pilsētām, tas ietekmē arī pārējo rajonu un pilsētu tirgus potenciālu – jo tālāk tās atrodas no Rīgas, jo mazāks ir to tirgus potenciāls. Rīgā ir koncentrēti 83% no visu apskatīto reģionu pilsētu zinātniskajām institūcijām, 83% - augsto tehnoloģiju uzņēmumu, 70% - TOP 500. Arī 60% no Latvijas kopējā eksporta radīja Rīgā atrodošie uzņēmumi (Analītisko pētījumu un stratēģiju laboratorija, 2008). Rīgā ir koncentrēta ļoti nozīmīga Latvijas gan kapitāla, gan cilvēkresursu daļa. Latvijā pastāv attīstības centri, kuru ietekme nesniedzas būtiski ārpus to atrašanās rajona robežām - Liepāja un Ventspils Kurzemes reģionā, Jelgava Zemgalē, Daugavpils un Rēzekne Latgalē un Valmiera Vidzemē. Tās ir pilsētas, kurās iezīmējas lielāka ekonomisko aktivitāšu, cilvēkresursu koncentrācija un labāka administratīvā kapacitāte. Latvijā pastāv izteiktas monocentrisku teritoriju raksturojošās iezīmes. Ņemot vērā konstatēto situāciju, Latvijā tiek īstenota jauna teritoriju attīstības koncepcija, kas ir vērsta uz teritoriju konkurētspējas paaugstināšanas priekšnosacījumu veidošanu. Realizējamā pilsētu sadarbības tīkla modeļa

ilgtspējīgās izaugsmes pamatā ir doma, ka pilsētas sadarbojas un funkcionāli papildina viena otru, lai veicinātu kopējo izaugsmi un attīstību. Tā ir sadarbībā radīta attīstība, kad pilsētām kopīgi strādājot, tiek veidota izaugsmei nepieciešamā kritiskā masa. Pilsētu sadarbības iespējas paplašinās, uzlabojoties cilvēku mobilitātei, kā arī transporta un informācijas tehnoloģiju infrastruktūrai. Attīstoties pilsētu tīklam, attīstās arī tam piekrītošā teritorija. Par vienu no instrumentiem pilsētu attīstības sekmēšanai ir uzskatāma pēc Eiropas Komisijas iniciatīvas izstrādātā Eiropas Reģionālās attīstības fonda līdzfinansētā prioritāte „Policentriska attīstība". Šīs programmas ietvaros paredzētās aktivitātes ir vērstas uz to, lai sekmētu pilsētu teritoriju attīstību, atbalstot dažādus inovatīvus ieguldījumus. Programmas ieviešanas princips - ierosinātā iniciatīva ļauj pilsētām izcelt un nostiprināt savu specifisko attīstības potenciālu, kā arī papildināt citu pilsētu izvēlētos darbības profilus. 2007. gadā Latvijā tika definēti sekojoši policentriskās attīstības centri:



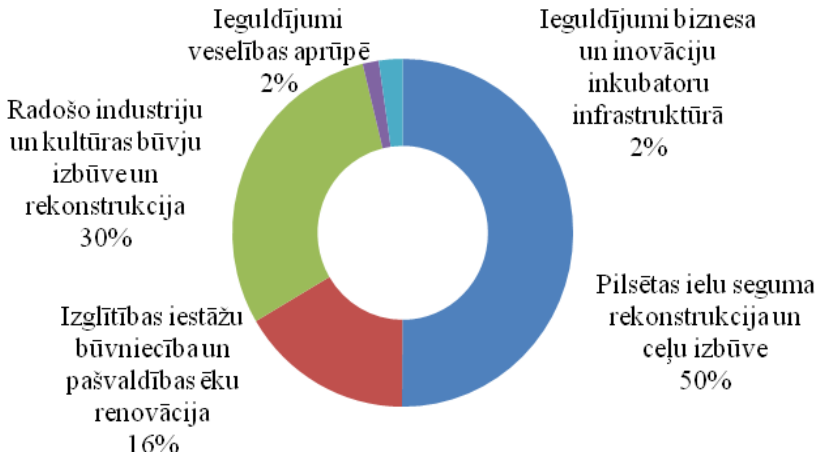
3. attēls. Definētās policentriskās attīstības nacionālās un reģionālās nozīmes pilsētas Latvijā. *Autores apkopojums*. (LR Ministru Kabinets, 2010)

Iniciētās programma būtība – nacionālās un reģionālās nozīmes pilsētas, definējot attīstības vīzijas 2007.-2013. gadu periodam, identificēja - kādus projektus ir nepieciešams realizēt piešķirtā finansējuma ietvaros. Piešķirto resursu izlietojums tika rūpīgi plānots, lai sasniegtu maksimālu efektivitāti. Plānošanas procesā tika izstrādātas integrētās attīstības (izaugsmes) stratēģijas un attīstības programmas katrai no pilsētām. Kopējais pieejamais finansējums ir 209 216 720 latu, tajā skaitā Eiropas Reģionālās attīstības fonda (ERAF) līdzfinansējums – 177 834 211 latu un nacionālais publiskais līdzfinansējums – 31 382 509 lati. (LR Ministru Kabinets, 2010). No 3. attēla datiem var secināt, ka finansējuma sadalījums ir atšķirīgs dažādām pilsētām. Finanšu resursu sadale tika veikta pamatojoties uz iedzīvotāju skaitu amplitūdu apdzīvotās vietās. Piešķirtais finansējums ir būtisks finansiāls atbalsts projektu īstenošanai pilsētvides un pilsētreģionu konkurētspējas, sasniedzamības vai pieejamības un pievilcības faktoru attīstībai:



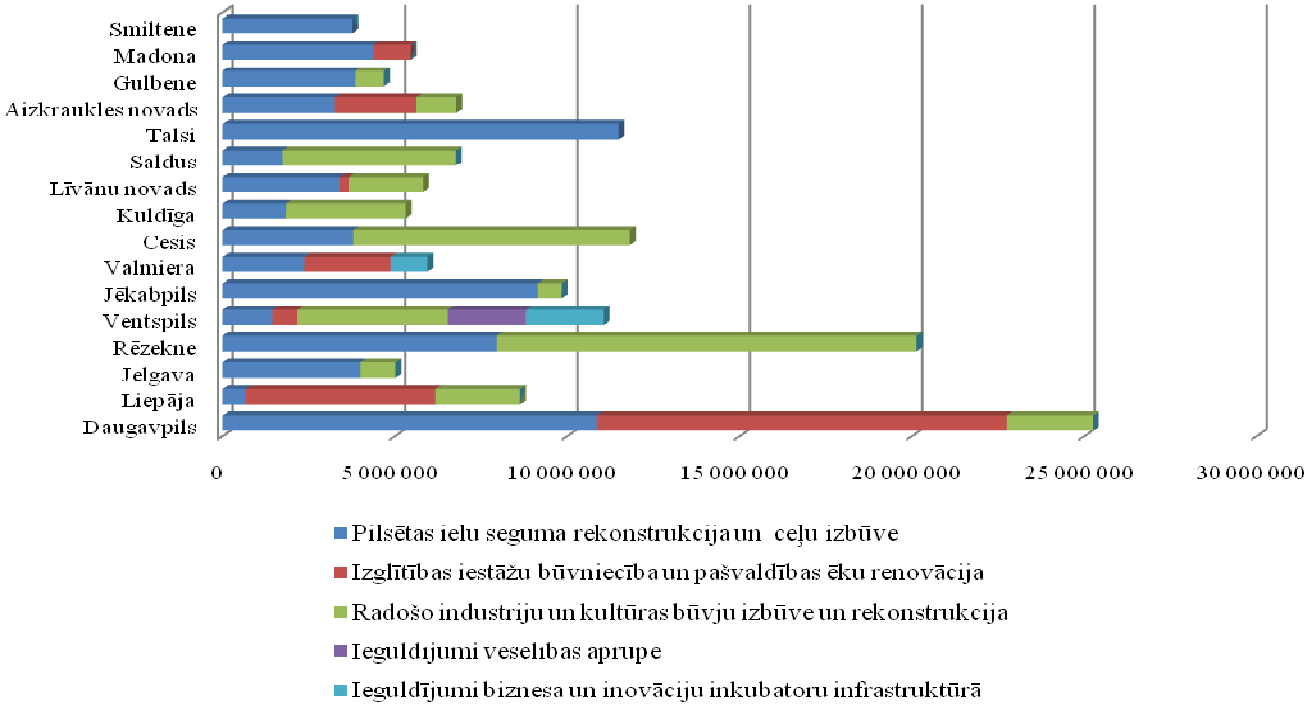
4. attēls. Piešķirtais ERAF finansējums Latvijas policentriskai attīstības programmā, LVL (LR Ministru Kabinets, 2010).

Raksta autore ir veikusi patstāvīgu pētījumu, lai noskaidrotu, kādas izvēles ir izdarījušas pilsētas savu projektu identifikācijai apstākļos, kad projektu ieviesēji jeb pašvaldības var patstāvīgi pieņemt lēmumu par to, kāda veida iniciatīvas atbalstīt. Empīriskās informācijas apkopošanai tika izmantoti Valsts reģionālās attīstības aģentūras dati par noslēgtajiem līgumiem 3.6.1.1. aktivitātes „Nacionālās un reģionālās nozīmes attīstības centru izaugsmes veicināšana līdzsvarotai valsts attīstībai" 1., 2 un 3. atlases kārtās. Laikā līdz 2011. gada 1. jūlijam kopumā ir iesniegti, izvērtēti un piešķirts finansējums 63 projektiem 147,812 miljonu LVL vērtībā (ERAF, valsts budžeta dotācija, pašvaldības līdzfinansējums) jeb ~70 % no visa pieejamā finansējuma. Katram apstiprinātajam projektam tika veikts izvērtējums rezultatīvajiem un finansiālajiem rādītājiem. Izpētes rezultātā tika identificētas piecas projektu grupas, ar dažādiem mērķiem un iznākuma rādītājiem:



5. attēls. Pilsētvides aktivitātes projektu izvērtējums pēc iznākuma rādītāju grupām, %. *Autores apkopojums.*

Kā galvenā prioritāte no pilsētu puses ir izvirzīta pilsētu ielu infrastruktūras sakārtošana – ielu seguma rekonstrukcija un ceļu izbūve (50 % jeb 74 milj. LVL). Inovatīvās uztveres kontekstā identificētas divas iznākumu rādītāju grupas – radošo industriju un kultūras būvju izveide, kā arī biznesa inovāciju inkubatoru infrastruktūras izveide (32 % jeb 44 milj. LVL). Būtisku atbalstu pilsētas paredz arī izglītības iestāžu būvniecībai un pašvaldību ēku renovācijai. Salīdzinoši nebūtiski ir ieguldījumi veselības aprūpē. Uzskatāmi pilsētu orientāciju uz inovatīvu risinājumu ieviešanu pilsētas teritorijā uzrāda iznākuma rādītāju analīze finansiālā izteiksmes skalā, salīdzinot katras pilsētas individuālo projektu uzskaitījumu. Pētījuma rezultāti atspoguļoti sekojošajā attēlā:



6. attēls. Latvijas pilsētu projektu analīze. Iznākuma rādītāju grupas izteiktas LVL.

Autores apkopojums.

Sastādītais grafiks atspoguļo situāciju par katru no pilsētām individuāli, uzrādot pašvaldību izvēles attiecībā uz stratēģiskajām prioritātēm. Daudzas no analīzē iesaistītām pilsētām atspoguļo rezultātus par labu inovatīviem projektiem. Autore secina, ka inovācijas rosinošie projekti, kas pašreiz tiek realizēti Latvijā pastāv, tie attiecas uz radošo industriju un daudzfunkcionālo centru izveidēm, inovatīvu koncepciju un kultūras infrastruktūras izveidošanu un renovāciju, kas vērstas un pilsētu tūrisma aktivitāšu veicināšanu. Īpaša loma ilgtspējīgā virzībā ir arī inovāciju inkubatoriem. Inovatīvi virzītas Latvijas pilsētas veiktās analīzes kontekstā ir Rēzekne, Cēsis,

Saldus un Kuldīga, kurās tiek būvētas inovatīvas jaunceltnes, kas nākotnē sniegs atbalstu konkurētspējas uzlabošanā un veicinās reģiona attīstību kopumā. Iniciētie ieguldījumi izvērtīsies inovatīvos attīstības problēmu risinājumos, tie spēs pozitīvi ietekmēt ne tikai pilsētu, bet arī apkārtējo teritoriju attīstību.

Secinājumi

1. Mūsdienu pasaulē ir formulēts ilgtspējīgas izaugsmes jēdziens, tas ir mainījusies laika gaitā, Eiropas Savienības nākotnes redzējums ir iekļauts stratēģijā „ES 2020". Ilgtspējīga izaugsme balstās uz vairākiem pamatprincipiem, kas pamatā paredz dzīvi saskaņā ar dabas likumiem un taisnīgu resursu sadali starp sabiedrības pārstāvjiem. Ilgtspējīgas izaugsmes resursu sastāvā ir dažādi faktori (Cilvēks, Vieta, Bizness), kas transformējas reālās darbībās.
2. Inovatīva pilsēta ir kopiena, kas savu izaugsmi balsta uz radošiem resursiem un cilvēku potenciālu, savā attīstībā līdzsvarojot ekonomiku, identitāti un inovāciju. Pilsētas vide nodrošina ideālu vidi inovācijām līdz ar to kļūstot par potenciālu inovāciju pilsētu. „Pilsētu inovācijas modelī" tiek izmantoti divi bloķēšanas jēdzieni: pilsētas centrs un vietējās saites. Šis modelis izskaidro, kāpēc inovācija ir koncentrēta pilsētās un to tuvumā. Pašvaldība veido vidi, kur satiekas inovatīvi uzskati un transformējas par konkrētām projektu idejām un aktivitātēm. Pašvaldības spēj gan piesaistīt finanšu resursus inovatīvu projektu realizācijai, gan noteiktu apstākļu iespaidā – mērķtiecīgi iniciēt finansējuma pārdales procesus par labu inovatīviem projektiem.
3. Latvijā realizējamā pilsētu sadarbības tīkla modeļa ilgtspējīgās izaugsmes pamatā ir izpratne, ka pilsētas sadarbojas un funkcionāli papildina viena otru, lai veicinātu kopējo izaugsmi un attīstību. Katra pilsēta ir izvēlējusies savu attīstības profilu. Pilsētu attīstības sekmēšanai tiek īstenota ERAF līdzfinansētā prioritāte „Policentriska attīstība". Apstākļos, kad pašvaldības pašas pieņēma lēmumu par pilsētā realizējamo projektu specifiku, 32 % jeb 44 milj. LVL no pieejamā finansējuma ir novirzīti divas inovatīvu iznākumu rādītāju sasniegšanai – radošo industriju/kultūras būvju izveidei, kā arī biznesa inovāciju inkubatoru infrastruktūras izbūvei. 16 projektu ieviesēju vidū kā inovatīvi virzītas Latvijas pilsētas ir noteiktas Rēzekne, Cēsis, Saldus un Kuldīga.

Izmantoto literatūras avotu saraksts

1. Athey G., Glossop C., Harrison B., Nathan M., Webber C.. (2007). Innovation and the city. How innovations has developed in five city-regions. Research report. London: NESTA: p.5
2. European Commission (2010). EUROPE 2020. A strategy for smart, sustainable and inclusive growth. Communnication from the Commission. 3 March.2010. Brussels: Commission of the European Union. Pieejams http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF
3. Mclnroy N. (2010). „Community development: sustainability, creativity and cooperation". Paper presented at the British Council and Centre for Local Economic Strategies (United Kingdom) seminar, March 30, Riga, Latvia.
4. Tatyana P. Soubbotina, The World Bank. (2000). Beyond Economic Growth An Introduction to Sustainable Development. 2nd ed. Washington,D.C: The International Bank for Reconstruction and Development/THE WORLD BANK: p.144.
5. Analītisko pētījumu un stratēģiju laboratorija, SIA (2008). Pētījums „Latvijas pilsētu sociāli ekonomiskās attīstības tendences". Rīga: Valsts reģionālās attīstības aģentūra: 237 lpp.
6. LR Ministru Kabinets (2010). MK noteikumi Nr. 91. „Noteikumi par darbības programmas "Infrastruktūra un pakalpojumi" papildinājuma 3.6.1.1.aktivitāti "Nacionālas un reģionālas nozīmes attīstības centru izaugsmes veicināšana līdzsvarotai valsts attīstībai", 2010. gada 26. janvāris. Rīga: LR Ministru kabinets. Pieejams http://www.likumi.lv/doc.php?id=205050&from=off
7. Melbārde D. (2008). „Kas ir Jūsu pilsēta?" Raksts prezentēts starptautiskajā konferencē „Culture as a driving force for municipal development", 12-14 septembris, Liepājā, Latvijā.
8. Valsts reģionālās attīstības aģentūra. Informācija par noslēgtajiem līgumiem 3.6.1.1. aktivitātē „Nacionālās un reģionālās nozīmes attīstības centru izaugsmes veicināšana līdzsvarotai valsts attīstībai" . Pieejams http://www.vraa.gov.lv/lv/eraf_2007_2013/attistiba/signed/

ESF EIROPAS SOCIĀLAIS FONDS
EIROPAS SAVIENĪBA
IEGULDĪJUMS TAVĀ NĀKOTNĒ
Šis darbs izstrādāts ar Eiropas Sociālā fonda atbalstu projektā
«Atbalsts Daugavpils Universitātes doktora studiju īstenošanai»
Vienošanās Nr. 2009/0140/1DP/1.1.2.1.2/09/IPIA/VIAA/015

NGO AS A SIGNIFICANT ELEMENT OF HELIX MODEL SYSTEM PROMOTING INNOVATIONS IN RURAL AREAS

Maiga Kruzmetra
Department of Sociology
Latvia University of Agriculture

Abstract.Helix model methodology leads to systemic and trans-disciplinary approach in the innovation promoting processes by means of the institutions of non-governmental sector.
A traditional model of implementing innovations –"academic circles – business institutions" established linear relationship (Double Helix model). The analysis of the international experience has led to the the formation of four element model variant (Quadruple Helix), due to the conclusion that the success of innovative changes is also determined by such an element of social system as the civil society and one of its organizing forces – non-governmental organizations.
The author participated in the research on the organizations of non-governmental sector in Latvia and proved that the societies formed by the groups of population are able to enter in the processes of innovative changes as a significant element of Helix model system.
Key words: Helix model**,** innovative activities, NGO, rural development

Introduction

One of the most essential precondition of the development of rural space is to increase the innovative ability of action. Already for a longer period the number of rural farms and people working in them becomes smaller, little and middle enterprices are developing slowly in rural territories, the number of unempoyed increases rapidly and in the result – the imigration to foreign countries takes place in the search of work.

The statistical data show that during the last 3 years the number of farms has decreased 26.8%, the number of people occupied in agriculture constantly – 18.2%, the number of people employed in agriculture in full yearly work units – 16.1%.(CSP.., 2011) In 2005 full working days were only 18.6% from the total number of all the people employed in agriculture, in 2007 – 14.0%, but in 2010 only 11.8% accordingly to the approximate calculations (CSB.., 2008, CSP..., 2011) Therefore the number of the people employed in agriculture decreases in the farms, the number of the people little used increases in them, and therfore the necessity for the possibilities of additional work increase too wich might be developed by the diversification of the management.

Secondly, the differentation of the social space develops in the country. Some certain means of the activities may be seen both by the townspeople and the countrymen in the suburban rural territories.(Viedokļi...), where the number of the population grows, economical activities concentrates and the social life - cultural life improve, but in some more distant reģions some minimal activities or even stagnation are observed. In the time period from 2005 till 2010 the total number of the population inhabiting rural space has decreased by 19.3 thousand people, the number of inhabitants of parishes has decreased by 11.9 thousand. However, as regards the population of

municipalities, the trends vary. The population of 80.9% of municipalities has decreased, but the population of 19.0% of municipalities has increased. The municipalities with an increased amount of population are found around large towns, primarily capital city. The significant decrease is observed in that part of rural space, which is located in the remote countryside. (Reģionu ..., 2010:49) As regards the unemployment rate, municipalities can be divided into three groups. The first one is formed by the municipalities with the unemployment rate under 10.0%, the second group includes the municipalities with the unemployment rate from 10.1% to 20.0%, but the third group is comprised by the municipalities with the unemployment rate of more than 20.1%. The municipalities with the lowest unemployment rate are concentrated around large cities, but a high rate is a feature of remote areas of the rural space (Reģionu ..., 2010:140-142).

The statistic data on sole traders/proprietors and enterprises per 1,000 inhabitants in rural space show that higher rates are characteristic of municipalities closer to the cities, they have up to ten times more sole traders/proprietors and enterprises than the municipalities in other areas of the rural space where self-employed persons dominate. (Reģionu ..., 2010:52)

In these conditions there is an actual question – how to make more active a large part of rural population, particulary those not living near large cities in order to be more active for finding some new activities, as well as finding some new skills of activities, for taking part in microentrepreneurship at least in such a way to provide for increasing the quality of their life too.

The goal of the study is to explain the role of social factors in the beginning of microentrepreneurship and their influence on their long-term economical activities. In this paper the following task should be included in the goal –

- to evaluate the activity of some nongovernmental organizations for the development of the entrepreneurship;
- to mention the principal support directins in NGO activities.

The method of research: - general scientific research methods as synthesis and analysis as well as socilogical methods as questionnaires and interviews.

Methodology of the research

The methodological basis of the research consists of the innovation systems and Helix model conceptions.

The innovation system concept can be understood in both a narrow as well as a broad sense (Piirainen & Koski 2004). A narrow definition of the innovation system primarily incorporates the R&D functions of universities, public and private research institutes and corporations, reflecting a

top-down model of innovation. A broader conception of the innovation systems is more interactive and bottom-up including „all parts and aspects of the economic structure and the institutional set-up affecting learning as well as searching and exploring" (Lundvall 1992). The author of this research has chosen this widest understanding of the innovation system including not only information givers/inovation elaborators, but also their consumers without which the coming of the real innovation in life is not possible.

The Helix model system is closely connected with the conception of the innovation systems and their versions analysing the systems beginnng from the contacts of the academic circles and entrepreneurs (Doubl Helix), by developing the 3 element system (Triple Helix) and at present stoping at the Quadruple Helix model formed by 4 system elements – academic sector, private sector, public sector and civil sector to which everybody according to his/her aspect influences the creaton of the innovative activity. (Arnkil R et al, 2010a). Two understanding lines have appeared in the Quadruple Helix mode too. In the first the civil sector has been perceived as the consumer totality requiring inovative products/services. (Arnkil R. et al, (2010b). In the second one – the organizational structures such as the Resource cetres or non-governmental organizations forming these centres have been mentioned as the creating factors of the innovative tendency. This 2nd understanding has been developed in oder to promote the inclusion of the rural women in the entrepreneurship.(Lindberg M., Lindgren M., 2010; Lindgren M., Packendorff J., 2010)

From this aspect the role of NGO influencing the direction of innovation may be seen in 4 aspects.

Firstly, NGO is interpreted as the cooperation platform of women-entrepreneurs in which non-hierarchic net of individuals, representetives of projects and firms which are the members of these organizations takes place and leads to the expansion and strengthening of contacts;

Secondly, NGO may be considered as a structure which helps to legitimize and create the contacts of the persons representing the small and middle entrepreneurship with the other institutions of the Helix system- municipalities, academic circles, education institutions functioning in different territories;

Thirdly, NGO is estimated as the institution able to take part both in the formation of specific/non-traditional competences and in promoting specific/non-traditional innovation processes, e.g., including the women in the entrepreneurship;

Fourthly, NGO as the promoter of the innovative entrepreneurship may concentrate on the development of individual work as a professional occupation which usually do not doThree Helix

model institutions concentrating on large firms and large projects. (Lindgren M., Packendorff J., 2010:33-34)

The author uses this NGO aspect in oder to analyse the organisations working in the countyside of Latvia and to estimate their activities.

Results and discussion

In 2000 in Latvia while uniting the women societies acting in many local municipalities and small towns in one common structure, the institution taking name Latvia Rural Women Association (LRWA) began its activities. Tree long-term goals were advanced for the activity of the association when beginning its activities -:

1.to promote the information of the rural population, particularly the women, as well as their taking part in the development processes of the civil society;

2. to promote the improvement of the working load and material and well-being of the women in the countryside;

3.to carry out functions of promotion of co-ordination and cooperation between the rural population and the local and governmental structures. (LLSA, www...)

The yearly account analysis of LRWA has made it posible to mention those directions of the activities of the association which may be adopted promoting the inovative action.

1. The expantion of cooperation – every summer in 6 – 8 places summer schools take place gathering 600 – 800 participants from the local organizations; contacts grow apace between the local societies and at the same time the guests from the other regins of the country.

Results: consciousnesss of social community and formation of different interest groups.

2. Organization of different courses and seminārs – during the existence of the society the principal themes of the courseshave been

- raising of self-confidence;
- obtaining political skills i noder to take part in the work of municipalities;
- elaboration and leading the projects;
- obtaining the basis of business;
- e-commerce.

Results: improvement of level of knowledge and competence.

3. Formation of Resource centres/information points – the formation of information system for the in formation circulation of diffeerent character from the centre of the society to the local societies, and from the local societies to the centre of the association.

Results: rather wide information circulation initiating activities of different character and direction.

4.Promotion of entrepreneurship:

- organization of micro-credit groups anf formation of micro-credit movement;
- foundation of Support fund of entrepreneurship working with the micro-credit groups;
- foundation of co-operative society „Akorande" for the promotion sale;
- participation organization in fairs and different exhibitions.

Results: micro-credit movement has been created; 124 micro-credit groups have been organized (starting of entrepreneurship mainly in the status of individual entrepreneurs), finances both from the project of the Nordic Coucil of Ministers, Interreg III B Project and from Mortage and Land banks; LRWA support fund of entrepreneurship has been created for the management of microcredit movement (LLSA 2002,...gada atskaites; Wiberg B., 2005; FEM ..., 2009)

The last direction of the society activity is partcularrly attributed to the activities mentioned on the inovative action in the entrepreneurship, however, the totality of all activities mentioned promotes the growth of social activities of the rural women and in many cases the change of the social status and social role.

- from the activity in the family to social activities in local municipality/county;
- from the situation of unpaid labour in family housekeeping to the official position of indifidual worker;
- from the status of unpaid worker in many cases to the status of the employer;
- from the law executor to the status of legislator in the power structures, first of all in the county;
- from the planner of personal development to the inclusion of elaboration and realization of territorial development programs.

As the investigations show (Shane S., 2003, Hindin M.J.,2007, Turner R.H, 2001, Dian N., 2009, Cragg R. & Spurgeon R., 2007, Foss N.J., 2003) the change of the social status and the role in it is a rather complicated process. It is also affirmed by the rural women starting the micro-entrepreneurship.

A.S. „The largest gain is the Project promoting the entrepreneurship in the countryside. I am not afraid to adress strange people about the themes interesting me".

S.N. „Of course, me have become more courageous, convincing, able to act independently, to get into contact, to find my niche where to act".

I.B. „Many wives who began their activities in LRWA, have become very active, courageous, enterprising socially working. A part has started their business, others have found a good job. I think that this is the most important thing which this society has given to the women”.

Using the group micro-crediting version Quadruple Helix model is formes thus -

1 - Academic sector *LUA teaching staff* -introductors of micro-crediting idea; -leaders of project „Microcredit” of The Nordic Council of Ministers in Latvia ; - leaders of INTERREG IIIB project FEM in Latvia; - lecturers and leaders of classes in seminars and summer schools of LRWA; - ivestigations and publications about micro-credit movement in Latvia		**2 - Private sector** *Participants of micro-credit groups* - self-employed; -individual business women; -participants of commercial societies; .
3 - Public sector *Laws and rules* 1. Law on Micro-enterprise Tax; 2. Law ”Personal Income Tax”; 3. The Cabinet of Ministers Regulation No 112 ”Regulation on Income Taxable with Payroll Tax”; 4. The Cabinet of Ministers Regulation No 1646 ”Procedure for Applying Licence Fee Payments to Sole Person’s Economic Activity in Particular Professions, and Its Amount”		**4 - Civil sector** *Latvia Rural Women Association* - expansion of cooperation; -organization of different courses and seminars; - formation of Resources centres/information points; - promotion of entrepreneurship: - foundation of Support fund of entrepreneurship - Co-operative „Akorande”

Source: Prepared by Author.

1. Figure 1. Group micro-crediting Quadruple Helix model

As the micro-crediting and particularly the group micro-crediting is an inovative version of starting entrepreneurship in the conditions of Latvia, NGO investment to introduce and maintain the inovative activity is clearly seen. While taking off the 4th element of the system the initiative of the entrepreneurship loses the well-known support system because the groups of micro-credit consist of LRWA members of local organizations. The participants of micro-credit groups advance the link with LRWA as the most important support for overoming the riski n the entrepreneurship, i.e., non-governmental organization which serves as a social „pillows". (Kruzmetra M., et al.,2010, 2011) LRWA fills up the niche which at present is not in the activity of state and municipality structures and is not officially delegated at least a partial financing to the non-governmental sector.

Although in the scientific literature the innovations are more considered as an economical process, the innovations have a social dimension. It comes to light in two kinds. Firstly, they are the social relations of the innovators and the forming of network between them. Secondly, they are values and goals promoting the innovations. (Lindberg M., Lindgren M., 2010:7) The non-governmental sector of the society may provide for the innovation processes of these social dimensions maximally. Therefore a larger support should be welcomed from the state institutions to NGo and first of all to the support promoting not only the consumption but also creation of new values.

The necessity of the social support of the entrepreneurship in rural territories is affirmed by the formation of entrepreneurship societies in the counties. During the last years the societies are fouded and started working the goal of which is to promote the entrepreneur -

1. Mutual cooperation and support, finding common problems;
2. Education in questions of entrepreneurship, Exchange of information;
3. Dialogue with local municipality, state institutions and organizations, representing common interests of local entrepreneurs. (Salaspils..., Kuldīgas..., Burtnieku..., Ķekavas...)

These goals of the activity of Societies formulated with small niances testify the understanding of entrepreneurs about the necessity and meaning of corporation and entrepreneurship as the promotion of economical activity in the processes.

The sufficiently long time of the LRWA activity makes it possible to see a wider activity to promote the entrpreneurship as well as the statement of the innovative action, which is not yet sufficiently visible in the action of entrepreneur societies founded in the last years. However certain tendences may be seen – for example, the society „Council of entrepreneurs of Ķekava county" has elaborated the action plan to improve the individual capacity both pf the organization and their members too. The plan includes -

- training of members in skills of presenting and argumenting, discussion and comprpmises formation skills;
- improvement of home page of the society in order to activize the Exchange of information of members as well as supporters;
- expansion of discussion with the county municipality about a wider cooperation;
- expansion of the activities of the society by including new members and more and more wider circles of the county entrpreneurs. (Vītola A., 2011:73)

The Societies mentioned repeat the activities carried out by LRWA and form social preconditions for expansion of the entrepreneurship.

The formation of entrepreneur societies in the counties affirms the expansion of the endogenous model of rural development because this model envisages the growth of the activity of the local population in order to solve the problems of settlements. (Low Ph., Murdoch J., Ward N., 1995)

While seeing some similarity in the activities in such societies as LRWA as well as in the county entrepreneur societies aimed to promote the entrepreneurship in rural territories, one diference may be seen. If the entrepreneur societies mainly are in Pierīga counties and in counties where the former district centres dominante and the commercial societies are busy, the activities of LRWA are mostly active in the counties where the activity of self-employed and individual business women are more expressed. (Reģionu attīstība..., 2010: 140-142.

Entrepreneurship having non-agricultural character in rural territories is an innovative action which need not only economical and legal resources but also such kind of resource as social capital which is affirmed by increase of the societies such a character. In meny counties agriculture stops to be the main sphere of employment but the expansion of entrepreneurship in other spheres of production and services, firstly, is the diversification of national economy and secondly, the change of the social status and social role in these processes for the people included.Therefore the necessity of the inclusion of the 4th element promoting the innovative actions in the Helix model is seen in Latvia too.

Conclusions

1. NGO according to its print is a structure acting on the principles of voluntariness does as unpaid work. It may be a social support to start the entrepreneurship, its further promotion of the activity as well as finding some new niche of the activity which is not provided or is not able to provide by the state micro-crediting programs.

2. The principal directions of NGO activities may be promoted by 3 directions – information of its members about any questions interesting to them; education in general knowledge as well as training in specificē directions in knowledge connected with the entrepreneurship; motivation/organization for the practical action in entrepreneurship while obtaining the legal basis of action, elaboration of business plans, risk overcoming ways etc. As well as actual knowledge, in the result providing for the formation of a constant cooperation net.
3. The societies of potential or existing entrepreneur activities promote the formation of clasters of state, regional as at least county level. LRWA work done in the formation of community of food craftsmen show such features while elaborating the Hand book of the branch of this craft, formation of a micro-credit group net around the LRWA Support fund of entrepreneurship, gathering around cooperative „Akorande" handycraft women, having constant contacts and doing many common activities.
4. The organization influensing the inovative processes in the level of state or at least of a region, is to be known having a positive aura in the aspect of the society and the power structures. Small organisations if there are the former conditions mentioned should collaborate with the local municipalities. The organizations of state scale are to influence the structures of regional and state scale.
5. As the women taking part in the entrepreneur society is perceived more reserved than the men action in this direction, just NGO, in this case LRWA, serves as a support system for the inclusion of rural women in the entrepreneurship.

References

6. Arnkil R., Jarvensivu A., Koski P., Piirainen T. (2010a) Exploring the Quadruple Helix. Report of Quadruple Helix Research for the CLIQ Project. 28 June 2010. Work Research Centre University of Tampere.
7. Arnkil R., Jarvensivu A., Koski P., Piirainen T. (2010b) Exploring the Quadruple Helix. Outlining user-oriented innovation models. University of Tampere. Institute for Social Research, 2010. 85/2010 Working Papers.
8. Burtnieku novada uzņēmēju klubs. Retrieved: http://www.firmas.lv/profile/burtnieku-novada-uznemeju-klubs-biedriba/40008152957 Access: 7 July 2011.
9. Cragg R., Spurgeon R. (2007) Competencies of a good leader. In: How to Succeed as a Leader. Ed. by Chambers R etc. Redclif Publishing, Oxford-NewYork, US, pp.33-40
10. CSB of Latvia. (2008) The structure of Agricultural farms of Latvia in June 2007. Riga
11. CSB of Latvia. (2011) Par 2010.gada lauksaimniecības skaitīšanas provizoriskajiem rezultātiem. Riga. http://www.csb.gov.lv
12. Dian N.(2009) Foresight Styles Assessment: A Theory Based Study in Competency and Change. Journal of Futures Studies, Nr. 13 (3), pp 59-74.
13. FEM: sieviešu uzņēmējdarbības attīstība. (2009) Jelgava, LLU. 192.lpp.
14. Foss N.J. (2003) The Emerging Competence perspective. In: Towards a Competence. Theory of the Firm. Ed. by Foss N.J. & Kundsen Ch. Routledge,. P. 237.
15. Hindin M.J. (2007) Role theory. In: The Blackwell Enciclopedia of Sociology. Ed. By G. Ritzer. Blackwell Publishing. pp.3951-3954

16. Krūzmētra M., Rivža B., Rivža S. (2010) *Grupu mikrokredīts kā uzņēmējdarbības uzsākšanas modelis lauku sievietēm.* LZP Ekonomikas, juridiskās un vēstures zinātnes galvenie pētījumu virzieni 2009. gadā. Nr. 15. Rīga, 48.-53.lpp.
17. Kruzmetra M., Rivza B., Rivza S. (2011) Role of Social Factors Generating Business Environment Proceedings of the International Scientific Conference „Economic Science for Rural Development 2011, Nr. 25, pp.206-213.
18. Kuldīgas biznesa apvienība „KBA". Retrieved: http://zo.lv/uznemumi/kuldigas-biznesa-apvieniba-kba Access: 7 July 2011.
19. Ķekavas novada uzņēmēju biedrība. Retrieved:http://www.kekava.lv/pub/index.php?id=404 Access: 7 July 2011.
20. Latvijas Lauku Sieviešu Apvienība (LLSA) Retrieved: http://www.llsa.lv Access: 7 July 2011
21. Latvijas Lauku sieviešu apvienības 2002., 2003., 2004., 2005., 2006., 2007., 2008., 2009., 2010. gada atskaites, Riga. Biedrības arhīvs.
22. Lindberg M., Lindgren M. (2010) The role of NGO in supporting women's entrepreneurship. A study of a Quadruple Helix Project in the Baltic sea region. Quadruple Helix reports 2010:4. Stockholm, Sweden.
23. Lindgren M., Packendorff J. (2010) A framework for the intergration of a gender perspective in cross-border entrepreneurship and cluster promotion programmes.. Quadruple Helix reports 2010:6. Stockholm, Sweden.
24. Low Ph., Murdoch J., Ward N.(1995) Networks in Rural Development: Beyond Exogenous and Endogenous Models. In: *Beyond Modernization: the Impact of Endogenous Rural Development*. J.D. van der Ploeg and G. Van Dijk (eds). Assen: Van Gorcum, p.87-106.
25. Lundvall, B.Å. (ed.) (1992). National Systems of Innovation: Towards a Theory of Innovation and Interactive Learning. London: Pinter.
26. Mikrouzņēmuma nodokļa likums LR likums, stājies spēkā 2010. gada 1. septembrī [skatīts 12.12.2010.].Retrieved: : http://www.likumi.lv/doc.php?id=215302 Access: 7 July 2011
27. Noteikumi par ienākumiem, par kuriem jāmaksā algas nodoklis. Ministru Kabineta noteikumi Nr.319, stājušies spēkā 1998. gada 3. martā. Retrieved: http://www.likumi.lv/doc.php?id=47540 Access: 16 November .2010.
28. Par Koncepciju par mikrouzņēmumu atbalsta pasākumiem. MK rīkojums Nr748.,30.10.2009 Retrieved:http://www.likumi.lv/doc.php?id=200709 Access: 15 October .2011.
29. Par iedzīvotāju ienākuma nodokli LR likums, stājies spēkā 1994. gada 1. janvārī Retrieved: http://www.likumi.lv/doc.php?id=56880 Access: 10 December .2010.
30. Par Latvijas mazo un vidējo komersantu mikrokreditēšanas programmu Ministru kabineta 2008. gada 2. decembra rīkojums Nr.752 (2008.) Retrieved: http://www.likumi.lv/doc.php?id=184689 Access: 10 March 2010.
31. Piirainen, T. & P. Koski (2004). Integrating workplace development policy and innovation policy. A challencing task. Experiences from the the Finnish workplace development programme. In: Fricke, Werner and Totterdill, Peter: Action Research in Workplace Innovation and Regional Development. John Benjamins, Amsterdam.
32. Reģionu attīstība Latvijā 2009. (2010) Valsts reģionālās attīstības aģentūra, Rīga. 172 lpp.
33. Salaspils novada uzņēmēju biedrība. Retrieved: http://www.salaspils.lv/lv/salaspils-novada-uznemeju-biedriba-snub/ Access: 7 July 2011.
34. Shane S. (2003) A General Theory of Entrepreneurship. The Individual – Opportunity Nexus. Edward Elgar Publishing, P. 327.
35. Turner R. H.(2001) Role theory. In handbook of Sociological Theory. Ed.by J.H. Turner, Springer. Pp. 244-254.
36. Viedokļi par Latvijas laukos notiekošo. LZP projekta Nr 09.1579 ietvaros veikta pilsētnieku un laucinieku nejaušas izlases aptauja (n=500) 2010. gada aprīlī un maijā.
37. Vītola A. (2011) Biedrības "Ķekavas novada Uzņēmēju padome" rīcībspējas paaugstināšana. Jelgava, LLU. [maģistra darbs]
38. Wiberg B. (2005) Micro-credit Networking for Women Entrepreneurs in Estonia, Latvia and Lithuania. Cooperation Project within the network „baltic-Nordic women in the rural areas"1999-2004. TemaNord 2005:564. Nordic Council of Ministers, Copenhagen. P.60.

PROJECT MANAGEMENT AND ENTREPRENEURSHIP: A TALE OF TWO 'CINDERELLAS'

Arvi Kuura PhD
University of Tartu, Pärnu College, Ringi 35 Pärnu 80010 Estonia
akuura@pc.ut.ee, +372 52 87 321

Introduction

The paper will examine the state of two academic disciplines – project management and entrepreneurship. Both disciplines are often regarded as not well established, still emerging and evolving, but also promising and encouraging. In spite of some analogies, incidentally in history, these disciplines have developed rather separately and their interconnections have been fairly limited. At the time some convergence can be observed in the recent years. The main task of this paper is to compare the two academic disciplines, exploring conformities and interconnections. The approach will mainly rely on comparative theoretical analysis, based on existing academic literature, and some synthesis.

1. A brief overview on Project Management

Project Management (hereinafter also PM) is an 'ancient' phenomenon, used throughout the recorded human history and even before it. The evidence from pre-historic period is not rich, but Cleland and Ireland (2006) see three types of evidence – artefacts (like the Great Pyramids), cultural strategies (like the *Magna Carta*), and literature and documents. Moreover, they rely on a common example of a pre-historic project – the Ark of Noah. It seems to be generally accepted that the mankind has used PM for a very long time, but as (academic) discipline and profession, PM is surprisingly young. For instance, Cleland and Ireland (ibid) pointed out that only in 1950s PM was formally recognized as a discipline and in even early 1970s PM was regarded as 'accidental profession'. In spite of that, the new profession was defined in the late 20th century.

It should be mentioned that within the last decades PM has been perceptibly promoted by professional associations, especially by the leading global organisations: Project Management Institute (PMI) and International Project Management Association (IPMA).

Cleland and Ireland (2006) point out is that PM – in whatever form, even rudimentary – has been used to create change or deal with change in societies. This statement is important because it links PM to innovation since ancient times.

Most scholars agree that contemporary PM came into being in 1950s. During these 50-60 years the discipline has evolved noticeably and is defined in PM literature. It is generally accepted

that the PM discipline has appreciably evolved and (despite a lack of solid evidence) it is often claimed that the use of projects as a form of work has increased (Cicmil et al 2009). This process is also called 'project orientation' or 'projectization' and/or 'projectification'.

The concept of project orientation by Gareis (2004, 2002) considers that companies and societies are becoming more project-oriented, because more projects and programmes are performed in companies and also in (small) municipalities, associations, schools and even in families.

Projectization is a relatively older phenomenon. Since the mid-1960s it has been often claimed that our society is becoming increasingly projecticised, i.e. organised in terms of time-limited sequences of (inter)action. This development, which has affected even personal lives of people, was caused by increased use of the project work form; and also by increasing tendency to view ongoing processes (or "business-as-usual") as limited in time and scope. (Packendorff 2002) Ekstedt et al (2005) claimed that projectization is a typical trend for neo-industrial organisations, which is playing a crucial role in many interesting developments – including the labour market, which might be affected by increasing projectization.

The term projectification appeared in the middle of 1990s in the article of C. Midler (1995) where he examined Renault's journey towards project orientation[7].

Maylor et al (2006) reviewed the evolution of projectification and introduced a new phenomenon 'programmification', standing for implementation of programmes and programme portfolios as management mechanisms in organisations. They claimed that projectification has considerably extended the definition of project and adjusted the understanding of projectification, eliciting that its novelty was not in the trend of organising work through projects but in the organisational changes that accompanied this trend. Finally, they (ibid) suggested that "… whilst project-level analysis is important and still has plenty of potential to explore, the multi-project level presents an area of great interest for both practitioners and scholars." Consequently, it represents a promising research agenda and this idea has already been developed further – like in the concept of "project business" by Artto & Kujala (2008).

An interesting question has been the overall share of project-based activities in world economy. Turner et al (2008) claimed that about one third (1/3) of the world economy is done via projects. This claim is based on their finding that in average projects account for one third of the

[7] The concept was taken from Gareis earlier (1989) publication 'Management by projects: the management approach for the future'. This heading indicates that this domain (project orientation, projectization / projectification) appears under different labels – 'management by projects' has (nearly) the same meaning.

turnover of SMEs. Considering the role of SMEs in economy (for instance, in EU the SMEs generate 56% of GDP and 70% of private sector employment), projects in SME sector account for about one fifth of the economy. Adding the share of new capital formation (large infrastructure projects), which is about 16% in developed countries, but up to 38% in fast developing countries (like China), it could be said that even more than one third of the world economy is project-based.

Turner et al (2008) also explore the 'dark side' of PM. Perceiving that the total share of project-based activities in the world economy is (at least) one third, it is astonishing that governments do not give much credit to PM. They (ibid) give also positive (in some measures) examples like China, UK and Australia, but most of countries do not really care much about PM. Besides the governments, the academic (management) community does not treat PM seriously. For example, no department in business schools in US has PM in its name; Journal of Management (leading general management journal) does not include PM in its list of key words.

Because of all afore-mentioned, Turner et al (2008) called PM as 'Cinderella subject'. Another important statement is that the theory of project management is immature – or even "There is no theory of Project Management". This means that PM cannot be an academic discipline, at least not a serious one. Turner et al (ibid) note that PM is often perceived as being a 'bunch of tools' and there are typical memes of PM like "if you have the right tools you can manage any project" and "if you can move a mouse you can manage a project". The first meme is originated form a view that the PM tools are universal and applicable to all projects; the second is proceeding from total computerisation and common viewpoint of PM software producers – if somebody is able to use the PM software, he/she can manage every project. Additional memes (ibid) are that the main tool for project management is critical path analysis and the main criteria for success are time, cost and quality, but not value to the sponsor (or the project owner or the organisation).

In addition to critical look in PM, the referred presentation of Turner et al (2008) points out nine schools of PM, showing also their development and interconnections. They show that PM is a rich, diverse field and these nine schools provide a perspective on the theory of PM and aid to the development of the theory. This is certainly the most important contribution of Turner et al (ibid), making PM as academic discipline 'promising'.

2. A very brief overview on Entrepreneurship

The term entrepreneurship is (like PM) also standing for a phenomenon and for an academic discipline. As a phenomenon, entrepreneurship (or entrepreneurial behaviour) is also "ancient', probably as old as mankind, its roots could be find in Bible and in ancient mythology.

Looking at entrepreneurship as an academic discipline, we can notice that some leading authors in the field have characterised entrepreneurship with word(ing)s like "eclectic" (Verheul et al 2001), "lacking a conceptual framework" (Shane & Venkataraman 2000) etc. Understandably, use of such word(ing)s does not sound good for a "solid" academic discipline.

Because entrepreneurship has been challenging for many scholars, there are many definitions of entrepreneurship, but an unambiguous definition is still missing[8]. As Davidsson (2003) wrote, "the literature is full of definitions of entrepreneurship, which differ along a number of dimensions …". This means that there is still a long way to a common definition and (more importantly) to a common understanding of entrepreneurship.

Speaking about entrepreneurship, some authors like Acs (2005), Busenitz et al (2003) and Richtermeyer (2003) have used the phrase "emerging field" (or "themes"). It means that so far we cannot speak about a consistent, universal theory in entrepreneurship; it consists of several different disciplines, such as psychology, sociology, regional science, economics, etc, and there is no common theoretical framework to synthesize these different approaches. (Virtanen 1997). Considering this, it is not surprising that there is still no unambiguous definition.

At the time, some scholars are more positive about entrepreneurship. For instance, Richtermeyer (2003) points out that entrepreneurship is continuously evolving and also expanding. Davidsson (2003) perceives progress in entrepreneurship research, relying mainly on important works in entrepreneurship, which increasingly appear in highly respected, mainstream journals. He sees conceptual development that attracts attention. Davidsson also refers to compiled handbooks, providing the field with more of a common body of knowledge (ibid). Thus we can conclude that the "emerging field" is also 'promising', as Shane and Venkataraman (2000) pronounced.

Looking at the history of Entrepreneurship as an academic discipline we can see that it relatively young. The first course in this field was offered by Myles Mace at the Harvard Business School in 1947. In 1953 Peter Drucker started his first Entrepreneurship and Innovation course at New York University. The first conference was held in St. Gallen University in Switzerland in 1948.

The first academic conference on small business management took place at the University of Colorado in 1956. It is worth to mention that the predecessor of International Council for Small

[8] The author realizes that such a statement could be criticized, especially by scholars who have proposed a definition for entrepreneurship.

Business (ICSB – nowadays the leading global SME and entrepreneurship organisation, uniting both academicians and practitioners-entrepreneurs) grew form this conference. (Cooper 2003).

3. Project Management and Entrepreneurship: meeting of two "Cinderellas'

At first sight, the two academic disciplines – Project Management (PM) and Entrepreneurship – seem to be quite opposite, having almost nothing in common. Both have respected scholarly journals in their fields, but when one will search with keyword 'entrepreneurship' (or SME[9]) in PM journals, the search will give very little results. The same will happen searching with keyword 'project management' in the databases of entrepreneurship journals. Similar situation will occur when searching by authors: one will discover two segregated scientific communities.

Taking closer look at these disciplines we can notice significant similarities. The first similarity (which was probably notable in presented brief overviews) is historical. As phenomena, both are 'ancient', considered to be almost as old as the mankind; but surprisingly young as academic disciplines – both started their development in the 1950-s (or after World War II).

The second similarity appears in the status and stage of development of these two disciplines. As stated before, both are characterised as not (yet) well established, still emerging and evolving, but also promising and encouraging. For instance, traits for entrepreneurship – like "eclectic" (Verheul et al 2001) or "lacking a conceptual framework" (Shane & Venkataraman 2000) – seem to be valid for PM as well. On the other hand, traits for PM – like "the theory of … is immature" or even "there is no theory of …" (Turner et al 2008) – seem to be valid for entrepreneurship. So we can say that PM is not the only 'Cinderella subject' – the state of entrepreneurship is similar and there are two 'Cinderellas'.

There are distinguishing aspects between the two disciplines. The most intrinsic is probably the viewpoint to the permanent-temporary dilemma: entrepreneurship is proceeding on permanent organisations and processes; project management on temporary. It may seem paradoxical, but the average 'life expectancy' of smaller entrepreneurial organisations is not nearly permanent. The high failure rate (called also 'infant mortality') of small business has been a very common topic in entrepreneurship literature. It means that average life cycles of SMEs are quite short and could be compared to the duration of some bigger projects, especially programmes.

---

[9] Abbreviation SME is standing for **S**mall and **M**edium **E**nterprises. Different size categories used in the World, but this paper relies on the European Commission (2005), who defines SMEs in following subcategories: medium – up to 250, small – up to 50 and micro – up to 10 employees. These subcategories have only upper limits: smalls can be counted into mediums, micros into smalls and mediums

In the recent years, some convergence between entrepreneurship and project management (PM) can be observed. This statement is based on the subjects of some conferences and publications, where common themes, theoretical and methodological approaches, etc, appear.

For example, an interlocking dimension is monism-pluralism. According to 'classical' view, an entrepreneur (a natural person or a legal person, formed by one or several natural persons) is owning and managing his/her/its one and only enterprise. In contemporary society we meet more and more multiple ownership (and complex ownership structures) and the scholars have started to speak about habitual – serial and portfolio – entrepreneurs. (Barrow 1998) Similar trend is observed in project management (PM) literature, where multi-project management is steadily attaching importance (Artto & Kujala 2008).

Cited before Cleland and Ireland (2006) have also revealed that PM is used to create or deal with change in societies. This links PM to innovation (and since ancient times). Entrepreneurship and innovation are also tightly linked: this is evident in academic literature, for instance Drucker (1985) and Acs et al (2009), as well as in policy documents (CIP 2005). As there are inherent links between project management (PM) and innovation, as well as between innovation and entrepreneurship, we can assume that there is also a link between PM and entrepreneurship, but the direct link between PM and entrepreneurship remains open.

The interrelations of innovation, entrepreneurship and PM are visualised in Figure 1. As seen, the role of a link between entrepreneurship and PM is (at least so far) realised by innovation.

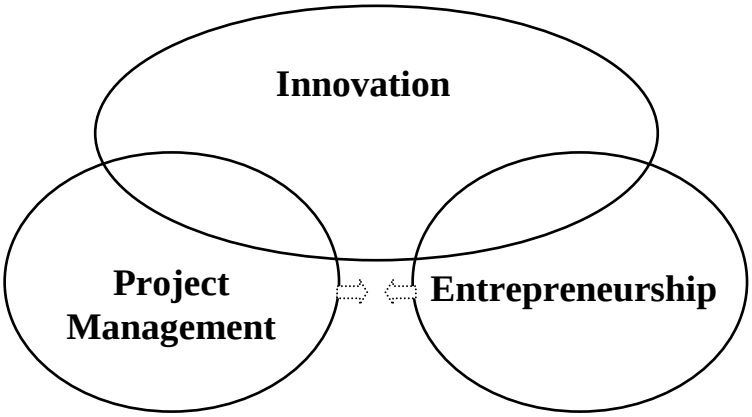


Figure 1. Mutual Relations of Project Management, Entrepreneurship and Innovation

The dashed arrows (on Figure 1) allude to possible direct link, but there is still an 'empty space'. However, there have been essential developments during the recent years. Precisely, a new subtopic has emerged within the past years – PM in SMEs. Until the very recent years, the PM

literature almost entirely focused on large organisations. The breakthrough is made by Rodney Turner, Ann Ledwith and John Kelly (2009), stating that "SMEs do require less-bureaucratic versions of project management…" and pointing out that there is a "… need for further research into the nature of those 'lite' versions of project management designed for SMEs" (ibid).

Therefore we can say that PM and entrepreneurship (or small business management) are linked. In some respect, there has been a link already during decades[10], but considerable development has occurred very recently – and these developments will probably accelerate in the very near future. And to conclude this brief discussion, it is appropriate to cite the words of Christophe Bredillet: "Project Management is the entrepreneurial side of business" (PMI Teach 2010).

Concluding remarks

The two evolving academic disciplines – entrepreneurship and project management – seem to have more common than they are used to have so far and there are signs of coming close during the last years. The two disciplines have similarities in history and in current state – both are (or might be) called 'Cinderella' because they are not (yet) well established, still emerging and evolving – but at the time, both are fast developing, promising and encouraging. In the recent years a new subtopic – Project Management in small firms – has emerged. Because the new subtopic has to rely on both disciplines, it will link Project Management and Entrepreneurship. Hopefully this will lead to more and closer contacts between these two disciplines, and thus to their mutual enrichment, which could foster the development of both academic disciplines.

References

1. Acs, Z. (2005) Preface // Global Entrepreneurship Monitor 2004 Executive Report. Babson College and London Business School
2. Acs, Z., Audretsch, D., Strom, R. (2009) Introduction: Why Entrepreneurship Matters // Entrepreneurship, Growth, and Public Policy. Ed. by Z. Acs, D. Audretsch, R. Strom. Cambridge University Press, Cambridge, N.Y. etc. pp 1-16
3. Artto, K., Kujala, J. (2008) Project business as a research field. // International Journal of Managing Projects in Business 1 (4) pp 469-497
4. Barrow, C. (1998) The Essence of Small Business. Prentice Hall Europe
5. Busenitz, L.W., West III, G.P., Shepherd, D., Nelson, T., Chandler, G.N., Zacharakis, A. (2003) Entrepreneurship Research in Emergence: Past Trends and Future Directions. // Journal of Management. 29(3) 285–308
6. Cicmil, S., Hodgson, D., Lindgren, M., Packendorff, J. (2009) Project management behind the façade. www.ephemeraweb.org 9(2), pp 78-92
7. CIP (2005) Decision of the European Parliament and the Council: Establishing a Competitiveness and Innovation Framework Programme (2007-2013). Brussels: Commission of the European Communities.

[10] In addition to indirect links (via innovation etc) a notable exception should be mentioned here – a book by Harold Kerzner and Hans Thamhain 'Project Management for Small and Medium Sized Businesses' (Wiley, 1984).

8. Cleland, D., Ireland, L. (2006) The Evolution of Project Management // Global Project Management Handbook: Planning, Organizing, and Controlling International Projects. 2nd Ed. Eds. D. Cleland & R. Gareis. McGraw-Hill
9. Cooper, A. (2003). Entrepreneurship: The Past, the Present, the Future. // Z. J. Acs & D. Audretsch (eds.), Handbook of Entrepreneurship Research. Boston: Kluwer.
10. Davidsson, P. (2003) The Domain of Entrepreneurship Research: Some suggestions. // Ed. by J. Katz & S. Shepherd. Advances in Entrepreneurship, Firm Emergence and Growth, Vol. 6. Oxford, Elsevier / JAI Press
11. Drucker, P. (1985). Innovation and entrepreneurship. London: Heineman
12. Ekstedt, E., Lundin, R., Söderholm, A., Wirdenius, H. (2005) Neo-Industrial Organising: Renewal by action and knowledge formation in a project-intensive economy. Taylor & Francis e-Library
13. European Commission (2005) The New SME Definition: User guide and model declaration. European Commission Publications Office, Luxembourg
14. Gareis, R. (2002) Management in the Project-oriented Society. WU-Jahrestagung "Forschung für Wirtschaft und Gesellschaft", 5.-7. November 2002, Wirtschaftsuniversität Wien [http://epub.wu-wien.ac.at/].
15. Gareis, R. (2004) Management of the Project-Oriented Company // The Wiley Guide to Managing Projects. Ed. by P. Morris & J. Pinto, pp 123-143
16. Maylor, H., Brady, T., Cooke-Davies, T., Hodgson, D. (2006) From projectification to programmification. // International Journal of Project Management, 24 (8) pp 663–674
17. Midler, C. (1995) Projectification of the Firm: the Renault Case // Scandinavian Journal of Management, 11(4) pp 363-375
18. Packendorff, J. (2002) The temporary society and its enemies: Projects from an individual perspective". // Beyond Project Management: New Perspectives on the Temporary-Permanent Dilemma. Ed by K. Sahlin-Andersson & A. Söderholm Malmö, Liber, pp 39-58
19. PMI Teach (2010) [www.pmiteach.org/ 02.02.2010]
20. Richtermeyer, G. (2003) Emerging Themes in Entrepreneurship Research. [http://www.missouribusiness.net/bridg/emerging_themes.pdf] 03.04.05
21. Shane, S., Venkataraman, S. (2000). The promise of entrepreneurship as a field of research. // Academy of Management Review 25(1) pp 217-226
22. Turner, J. R, Bredillet, C., Anbari, F. (2008) The Nine Schools of Project Management. Presentation at Special EDEN Doctoral Seminar, Lille, August 18-22
23. Turner, J. R, Ledwith, A., Kelly, J. F. (2009) Project Management in Small to Medium-sized Enterprises: a comparison between firms by size and industry // International Journal of Managing Projects in Business, 2(2) pp 282-296
24. Verheul, I., Wennekers, S., Audretsch, D., Thurik, R. (2001) An Eclectic Theory of Entrepreneurship. Tinbergen Institute Discussion Paper TI 2001-030
25. Virtanen, M. (1997) The Role of Different Theories in Explaining Entrepreneurship. // Kunkel, S (editor). Entrepreneurship: The Engine of Global Economic Development. Journal of Best Papers of the 42nd World Conference, International Council for Small Business. San Francisco, June 1997

ZIEMEĻVIDZEMES NOVADU PILSĒTU ATTĪSTĪBA PAŠVALDĪBU DARBINIEKU SKATĪJUMĀ

NORTHERN VIDZEME MUNICIPAL DEVELOPMENT FROM THE PERSPECTIVE OF THE REGIONAL GOVERNMENTAL EMPLOYEES

Jānis Ķusis, dr.hist.,
Latvijas Lauksaimniecības universitāte, Lielā iela 2, Jelgava, LV- 3001,
e-pasts: janis.kusis@llu.lv; tel. 26747436

Abstract. The administrative status of small towns has been changed after the administrative territorial reform in Latvia. The greater part of them became the centers of administrative, economical and social development of the new administrative units – counties. The article reflects the research carried out to examine the views of the municipalities' officials about the social and economical development of the eight county's towns in Northern Vidzeme. The theoretical framework of the study is based on the Complex approach to the local development investigation. The research study is based on the qualitative research method- semi structured interviews. The results from the study show that developed infrastructure, access of education and qualitative culture environment are the main factors that encourage development. But aging and emigration of inhabitants, bureaucratic obstacles created by state establishments unadvised administrative territorial reform and general distrust toward political institutions are obstructive developmental factors. However local self-governments support entrepreneurship in their territories according to budget possibilities and development strategies.
Key- words: development, county, town, self-government.

Ievads

Pēc administratīvi teritoriālās reformas ir mainījies Latvijas mazo pilsētu administratīvais statuss. Lielākā to daļa ir kļuvušas par novadu administratīvajiem centriem. Saskaņā ar reformas koncepciju un valsts policentriskas attīstības ideju novadu pilsētām ir jākļūst par attiecīgās administratīvās teritorijas ekonomiskās un sociālās attīstības centriem, kas spēj nodrošināt iedzīvotājus ar darba vietām un pakalpojumiem, tādējādi radot pievilcīgus dzīves apstākļus, kas savukārt kalpo kā būtisks iedzīvotāju piesaistes faktors. „Latvijas ilgtspējīgas attīstības stratēģija" paredz, ka „mazajām pilsētām un atsevišķos gadījumos lielākajām lauku apdzīvotajām vietām ir jāpilda novadu nozīmes attīstības centru loma, sniedzot apkārtējo teritoriju iedzīvotājiem pakalpojumus un nodrošinot darba vietas... jākoncentrē pakalpojumi, kas nodrošina pievilcīgu dzīves vidi un priekšnosacījumus ekonomikas attīstībai" (Latvijas ilgtspējīgas attīstības stratēģija, 2010, 69-70).

Līdz pat 20.gadsimta beigām ar vietas attīstības pētniecību nodarbojās galvenokārt ekonomisti un ģeogrāfi. Viņi pievērsa uzmanību tādiem attīstības aspektiem kā darbavietu un iedzīvotāju veselības nodrošinājums (Armstrongs, Teilors), nodarbinātība, darba ražīgums, iedzīvotāju ienākumi (Storpers) u.c. (Pike A., Rodriguez- Pose A., Tomaney J., 2009). Pakāpeniski attīstības pētniecībai pievērsās arī citu zinātņu, tai skaitā menedžmenta un socioloģijas pārstāvji. Sociologu iesaistīšanās attīstības pētniecībā

saistāma ar E.Dirkeimu, Čikāgas skolu un neomarksistiem. E.Dirkeims attīstības jēdziena pamatā liek profesionālo un ekonomisko specializāciju, kas palielina pilsētas kā koordinējoša centra lomu. E.Dirkeims skata pilsētu kā saspiestu dzīves un darbības telpu. Šo domu tālāk attīsta Čikāgas skolas pārstāvji, sasaistot iedzīvotāju skaitu un blīvumu ar sabiedrības daudzveidību un attīstības iespējām (Пирогов С.В., 2003,59). Savukārt neomarksisti par pilsētas attīstības pamatu pieņem ražošanas veidu. Piemēram, M.Kastels *(M. Castells)* uzskata, ka pilsētas sociālās dzīves galveno saturu veido kapitāla ražošana (Пирогов С.В., 2003, 62). Viņš uzsver pilsētu un reģionu nozīmi attīstības nodrošināšanā šodienas apstākļos un parāda, ka Eiropas pilsētas un reģioni arvien vairāk apvienojas institucionālos tīmekļos, kas, apejot nacionālās valstis, veido vienu no ietekmīgiem lobijiem, kas vienlaicīgi darbojas gan uz Eiropas institūtiem, gan nacionālajām valdībām. Tieši šajā aspektā M.Kastels saskata pilsētu lielākās priekšrocības, salīdzinot ar valdībām. Kamēr nacionālās valdības savā rīcībā ir ierobežotas ar Eiropas Savienības regulām, pilsētas veiksmīgi iesaistās sarunās ar multinacionālajām korporācijām un kļūst par ekonomikas attīstības svarīgākajiem aģentiem (Regional Identity , 2004, 10.). Līdzīgus uzskatus pauž 20.gadsimta otrās puses franču sociologs H.Lefevrs (*H.Lefebvr*) savā kapitāla otrreizējās aprites koncepcijā. Viņš pilsētu uzskata par naudas ražošanas mašīnu, kas ir ne tikai ekonomikas, bet arī sabiedrības attīstības pamats, kas piesaista cilvēkus un rada pamatu ātrākai pilsētu augšanai, jo peļņa tiek ieguldīta pilsētas infrastruktūras attīstībā (Lefebvr H., 2009).

Tikai 20.gadsimta pašās beigās un 21.gadsimta sākumā izkristalizējās t.s. kompleksā pieeja attīstības jēdziena skaidrojumam, kas ļauj vispusīgi izvērtēt dažādu, tai skaitā globalizācijas, procesu ietekmi uz telpisko, ekonomisko un sociālo pilsētu un to apkārtnes attīstības dimensiju. (Perry B., Harding A., 2002, 847). Viens no kompleksās pieejas aizsācējiem Bīrs (Beers) ar attīstību saprot aktivitāšu kopumu, kas vērsts uz teritorijas ekonomiskās labklājības paaugstināšanu un ietver: ekonomiskās attīstības stratēģiju, uzņēmējdarbību, darba tirgu, pētniecību, tehnoloģiskos jaunievedumus, politisko lobismu u.c. (Pike A., Rodriguez- Pose A., Tomaney J., 2009). Gedess, Ņūmens, Haugtons un Kaunsels (*Geddes, Newman, Haughton, Counsell*) Bīra pieeju papildinājuši ar sociālo, ekoloģisko un kultūras dimensiju, iekļaujot tajā tādus faktorus kā sociālās nevienlīdzības mazināšana, vides ilgtspējības nodrošināšana, iekļaujošas pārvaldes un pārvaldības veicināšana un kultūras dažādības atzīšana. (Pike A., Rodriguez- Pose A., Tomaney J., 2009). Rezultātā ir izveidota daudzdimensionāla attīstības koncepcija, kas ir piemērota arī novadu sociāli ekonomiskās attīstības pētīšanai Latvijā.

Raksta mērķis – analizēt Ziemeļvidzemes novadu pilsētu sociāli ekonomisko attīstību pēc administratīvi teritoriālās reformas pašvaldību darbinieku skatījumā.

Uzdevumi:

- iepazīties ar Ziemeļvidzemes novadu pilsētu sociāli ekonomiskās attīstības galvenajām tendencēm pēc administratīvi teritoriālās reformas;
- noskaidrot novadu pilsētu attīstību veicinošos un kavējošos faktorus.

Pētījuma metodes

Atšķirības novadu attīstības veidos parādās gan kvantitatīvi, gan kvalitatīvi. Attīstības kvantitatīvā dimensija ietver tādus rādītājus, kā IKP uz vienu iedzīvotāju, radīto darbavietu skaits, jauni investīciju projekti, nodibinātu jaunu uzņēmumu skaits u.tml. Kvantitatīvā pieeja objektīvi parāda absolūtās vai relatīvās pārmaiņas noteiktā teritorijā noteiktā laikā. Savukārt kvalitatīvā dimensija akcentē novadu attīstības subjektīvo raksturu, piemēram, ekonomiskā, sociālā un ekoloģiskā ilgtspēja, izaugsmes veidi, nodarbinātības tipi un kvalitāte, investīciju ieplūšana un ilgtspēja, jaunu uzņēmumu izaugsmes potenciāls un sektori. Kvalitatīvā dimensija balstās vairāk uz subjektīviem viedokļiem, kas saistīti ar attīstības specifiskiem principiem un vērtībām (Pike A., Rodriguez- Pose A., Tomaney J., 2009, 40).

Latvijas novadu attīstības kvantitatīvais raksturojums ir dots Valsts reģionālās attīstības aģentūras veiktajā pētījumā „Reģionu attīstība Latvijā". Par pamatu novadu raksturojumam pētījumā izmantoti tādi indikatori kā iedzīvotāju skaits, teritorijas platība un iedzīvotāju blīvums, iedzīvotāju ienākuma nodoklis, bezdarba līmenis, ekonomiski aktīvās tirgus sektora statistikas vienības, ekonomiski aktīvie individuālie komersanti un komercsabiedrības u.c. (Reģionu attīstība Latvijā). Savukārt šis raksts ir balstīts uz kvalitatīvo pieeju pašvaldību sociāli ekonomiskās attīstības izpētei.

Lai noskaidrotu pašvaldību darbinieku viedokli par novadu pilsētu attīstību pēc administratīvi teritoriālās reformas, 2010.gada vasarā Valsts pētījumu programmas „Nacionālā identitāte" projekta „Nacionālā identitāte un rīcībspēja" ietvaros tika veiktas daļēji strukturētas intervijas astoņās Ziemeļvidzemes novadu pilsētās: Alojā, Ainažos, Limbažos, Mazsalacā, Rūjienā, Salacgrīvā, Staicelē, Valmierā.

Rezultāti un diskusija

Pēc administratīvi teritoriālās reformas Latvijā izveidojušās 119 pašvaldību administratīvās teritorijas, kas ir ļoti dažādas „gan teritorijas platības, gan iedzīvotāju skaita, apdzīvojuma, dabas, izvietojuma un kultūrvēsturisko apstākļu, gan arī sociālekonomiskās situācijas, attīstības iespēju,

pašvaldību rīcībspējas, finanšu resursu, pašvaldību darbības kvalitātes, efektivitātes u.c. faktoru ziņā" (Reģionu attīstība Latvijā, 44). Taču jebkuras teritorijas attīstības pamatu veido ekonomika. Līdzšinējie pētījumi rāda, ka ekonomiskās aktivitātes tradicionāli koncentrējas galvenokārt Pierīgas reģiona novados, kuros iedzīvotāju ienākuma nodoklis ir krietni lielāks nekā vidēji novados, piemēram, 2009.gadā Garkalnes novadā tas bija Ls 549,8; Babītes novadā- Ls 514,9; Ķekavas novadā- Ls 513,1; kamēr novados vidēji- Ls 286,5. Jo tālāk no Rīgas, jo iedzīvotāju ienākuma nodoklis ir mazāks: Zilupes novadā tas bija Ls 132,8; Rugāju novadā Ls 127,5, bet Vārkavas novadā- Ls 114,5 (Reģionu attīstība Latvijā, 50). Līdzīga aina ir vērojama arī darba tirgū. Ja Garkalnes un Ādažu novadā bezdarba rādītājs uz 2010.gada sākumu bija 7,8%, tad Zilupes novadā tas bija 27,4%, bet Viļānu novadā – 28,3% (novados vidēji- 13,4%) (Reģionu attīstība Latvijā, 51). Tas nozīmē, ka pašvaldībām jādomā, kā veicināt uzņēmējdarbības attīstību savā teritorijā, padarīt teritoriju pievilcīgu investoriem, dažādot darba tirgu. Ziemeļvidzemes novados veiktais pētījums parādīja, ka novadu pilsētās attīstās galvenokārt tradicionālās ražošanas nozares:

„Vairāki kokapstrādes uzņēmumi... Lauksaimniecības kooperatīvs, kas diezgan labi strādā, var redzēt lielus ganāmpulkus, zeme ir apstrādāta" (Mazsalaca)

„...pašvaldība ir padziļinājusi, rekonstruējusi molus, zvejniekiem uzbūvējuši piestātni, kas bija iepriekšējā noruna ar zvejniekiem un vēl jahtu attīstītājiem. Ieguldījām miljonu latu Eiropas naudiņas, un šobrīd mēs redzam tur apmēram 3miljonus privātās investīcijas jahtu un atpūtas sektorā..." (Salacgrīva)

Interesantu pieeju uzņēmējdarbībai atraduši Rūjienā, kur izveidojusies veiksmīga sadarbība ar Kigašihavas pilsētiņu Japānā. Pēc Kigahišavas pašvaldības iniciatīvas, japāņi iegādājas Rūjienā vietējo mājražotāju produkciju *„tur ir lini, koka karotes, krellīšu vērējas.... Kigahišavā ir veikaliņš, kur viņi iztirgo viņu pašvaldības iegādāto produkciju"* (Rūjiena).

Limbažos un Salacgrīvā izveidotas un veiksmīgi darbojas Uzņēmēju padomes, kas reizi mēnesī tiekas ar novada domes pārstāvjiem, lai pārrunātu nākamajā domes sēdē skatāmos jautājumus.

Var teikt, ka kopumā novadu pašvaldības apzinās savu lomu uzņēmējdarbības veicināšanā un izmanto tos līdzekļus, kas ir to kompetencē:

- nodokļu atvieglinājumi tiem uzņēmumiem, kuru attīstībā pašvaldība ir sevišķi ieinteresēta;
- uzņēmumu nodrošināšana ar zemi. Dažkārt pašvaldības uzņēmumiem piešķir īpašumā esošo zemi par velti vai pārdod par pazeminātām cenām;

- pašvaldību iesaistīšanās ar saviem līdzekļiem, lai veicinātu kāda biznesa attīstību. Piemēram, ceļu remonts, tiltu būve, ūdens un kanalizāciju sistēmas sakārtošana, sabiedriskā transporta nodrošinājums;
- ūdens un gaisa piesārņotības samazināšanas pasākumi;
- administratīvo procedūru atļauju, licenču u.c. dokumentu izsniegšanā vienkāršošana;
- teritorijas infrastruktūras sakārtošana, kas savukārt rada pievilcīgu vidi uzņēmējiem.

Pašvaldībām ir iespējas atbalstīt uzņēmējdarbības attīstību savā teritorijā atbilstoši to budžeta iespējām un attīstības perspektīvām.

Galvenās problēmas, kas rada nopietnu satraukumu novadu pašvaldību darbinieku vidū ir: iedzīvotāju novecošanās un aizplūšana, sociālo pakalpojumu pieejamība, medicīnas pakalpojumu pieejamība, jaunu darba vietu radīšana, transporta tīkla sakārtošana. Iedzīvotāju skaits Latvijas novados kopumā samazinās, lai gan ne tik strauji kā valstī kopumā. Piecu gadu laikā- no 2005.gada sākuma līdz 2010.gada sākumam- novadu grupā tas ir samazinājies par 1,6%, kamēr Latvijā vidēji- par 2,1%. (Reģionu attīstība, 2010: 49). Diemžēl šī tendence pašreizējās krīzes apstākļos tikai pastiprinās, pie kam bieži aizbrauc labākie un aktīvākie:

"Jaunieši pārvietojas, aizbrauc uz lielākām pilsētām un, protams, tas augstākais slānīts, kas ir tie progresīvākie jaunieši, kas ir apņēmības pilni mācīties, strādāt, arī drusku talanti – tie pārvietojas, urbanizējas. Šeit paliek tas zemākais slānīts, caurkritušie..." (Rūjiena).

"Mazsalacā ir ļoti liels veco iedzīvotāju īpatsvars. Baidos, ka vairāk par pusi būs virs 60 gadiem... Visvairāk uztraucas par to pašu pensiju jautājumu, jo nav tādas drošības sajūtas, tādas stabilitātes, ka tās pensijas mums paliks. Ka tās cenas varētu iet zemē, tam neviens netic..." (Mazsalaca).

Slimnīcu un ambulanču slēgšana, ātrās palīdzības pakalpojumu centralizācija lielajās pilsētās ne tikai atņem darba iespējas daudziem mediķiem, bet arī sadārdzina medicīnas pakalpojumus un padara tos nepieejamākus novadu iedzīvotājiem.

"Medicīna diemžēl palikusi stipri dārgāka, lielā mērā nepieejamāka" (Mazsalaca).

Par transporta tīkla optimizācijas nepieciešamību runāja Rūjienā.

"*Kad paskatāmies autobusa piepildījumu, un tev tas viens cilvēks ir 40 vai 30 kilometrus jāatved. Tas lielais autobuss pa zemes ceļu drebinās..."* (Rūjiena).

Šeit pašvaldības amatpersonas apsver iespēju ieviest Islandē realizētu praksi, kad cilvēki, kas dzīvo tālāk no centriem, savstarpēji kooperējas un nokļūšanai centrā izmanto personīgos transporta līdzekļus.

Viens no būtiskiem attīstību ietekmējošiem faktoriem ir izglītība. Tāpēc visiem sabiedrības locekļiem jānodrošina kvalitatīva, visiem pieejama un darba tirgus prasībām atbilstoša izglītība visa

mūža garumā. Daudzviet novados skola ir ne tikai izglītības, bet arī kultūras un attīstības centrs. Diemžēl krīze valstī ir krietni samazinājusi valsts budžeta resursus izglītībai un radījusi lielas izmaiņas skolu tīklojumā. Lai gan skolas esamība nodrošina mazpilsētām zināmu pievilcību, ir slēgtas vai reorganizētas vairākas skolas pārveidojot tās par pirmsskolas izglītības iestādēm, saglabājot sākumskolas izglītību, vai pievienojot citai novada teritorijā esošai skolai. Tā rezultātā darbu ir zaudējuši vairāki tūkstoši pedagogu, krasi ir samazināts atalgojums, ir apdraudēts mūzikas, mākslas, sporta skolu un izglītības pulciņu finansējums.

„Vecās vidusskolas ēkai nav pietiekama noslodze. Blakus tika pārvietota Mākslas skola. Nākotnē varētu arī muzeju pārvietot, jo tas tomēr ir drusku tūrisma objekts” (Mazsalaca).

Limbažos ir pieņemts politisks lēmums par divu vidusskolu apvienošanu un Valsts ģimnāzijas izveidošanu uz to bāzes. Taču novada domei nav izdevies pietiekami labi izskaidrot šo lēmumu šo skolu pedagogiem, audzēkņiem, viņu vecākiem, kā arī sabiedrībai kopumā. Rezultātā ap šo jautājumu pilsētā virmo nevienam nevajadzīgas kaislības. Savukārt Salacgrīvas pašvaldība bija viena no pirmajām, kura jau 2002.gadā ieviesa skolu finansēšanu pēc bērnu skaita, tādējādi veicinot zināmu konkurenci starp izglītības iestādēm:

„Mēs vieni no pirmajiem iesākām tādu lietu, noteicām finansējumu, kas ir no pašvaldības uz bērnu skaitu savām skolām Salacgrīvas pilsētā ar lauku teritoriju, lai mazliet tomēr stimulētu šo te konkurenci... Doma, ka katra skola būtu ieinteresēta parādīt, ko viņa spēj, pārdomātu, ko viņa spēj. Skolas pat sāka izdot bukletiņus, kur parādīt, ka mēs ne tikai mācāmies, ka mums ir arī pulciņi, mums ir mākslas skola, lai ieinteresētu vecākus un bērnus tieši mācīties tur” (Salacgrīva).

Lai piesaistītu iedzīvotājus novadu teritorijai, liela nozīme ir kvalitatīvai kultūrvidei, kas kalpo par pamatu arī ekonomiskajai un sociālajai aktivitātei novadu pilsētās. Šajā ziņā Ziemeļvidzemes novadu pilsētām ir paveicies- brīnišķīgā ainava ar Salacu, Sarkanajām klintīm, Skaņo kalnu, svētajiem akmeņiem un Zvejnieku parku Salacgrīvā u.t.t. Šeit ir radīti visi apstākļi, lai attīstītu tūrismu, un vietējās pašvaldības to izmanto. Tiesa, ne vienmēr mūsu kultūras vērtības būs pievilcīgas un interesēs ārzemniekus. Piemēram, *„Mums bija globālā tūrisma pārstāvji no Skotijas, mēs viņiem rādījām svētos akmeņus, bet viņi pagrozīja galvas un teica, ka vienīgā vērtība, kas jums ir, tas ir Zvejnieku parks, tā ir tā teritorija, kur notiek Positivus, notiek Zvejnieku svētki, sporta svētki, ir estrāde, infrastruktūra; tā ir tā teritorija pašā jūras krastā. Tā ir tā vērtība, kas daudz kur nav redzēta”* (Salacgrīva).

Par tūristu trūkumu nesūdzas arī Mazsalacā un citās Ziemeļvidzemes novadu pilsētās. Interesanta pieeja kultūrvides attīstīšanā bija vērojama Rūjienā, kur līdzās tradicionālajai latviskajai ainavai tiek veidots japāņu ķiršu dārzs:

„Mazpilsētas mierīgā dzīve ar sakoptu infrastruktūru un japāņu ķiršu dārzu. Mums ir savs sakuras dārzs" (Rūjiena).

Kā galvenie traucējošie faktori novadu pilsētu attīstībai intervijās tika atzīmēti: valsts iestāžu radītie birokrātiskie šķēršļi, līdz galam nepārdomāta administratīvi teritoriālā reforma, vietējo līderu politiskās ambīcijas, kā arī vispārēja neuzticēšanās politiskajiem institūtiem.

Jau 2010.gadā daudzās intervijās izskanēja doma par to, ka cilvēkos ir ļoti liela neticība valdībai un valstij, kas negatīvi atsaucas arī uz pašvaldību darbu, jo pat *„vislabākās idejas būs ārkārtīgi grūti realizēt, mērķi sasniegt"* (Limbaži).

„...pilsētas iedzīvotāji ir arī dubultā zaudētāji... Valsts ir piespiedusi ar likumu Limbažu pilsētas iedzīvotājus dzīvot sliktāk. Ja pirms šīs reformas Limbažu pašvaldība bija maksātāja pašvaldību finansu izlīdzināšanas fondā, tad tagad Limbažu novads saņem. Līdz ar to skaidrs, ka mēs dzīvojam sliktāk." (Limbaži)

"Valsts neļauj zemniekiem strādāt. Mēs dotu savējiem iespēju nopelnīt, bet mēs to nevaram" (Staicele).

Salacgrīvā izskanēja neapmierinātība ar līdz galam nepārdomātu valsts iestāžu izvietojumu un funkciju sadalījumu:

„Mēs labāk redzētu, lai valsts pārvaldības institūcijas kaut kādā veidā nesašķeltu novadu, novada konkrēto teritoriju... Par policiju runājot, ir Salacgrīvas iecirknis, kas apkalpo Staiceli, kas nav mūsu, Ainažus, Salacgrīvu, bet Liepupe, kas ir mūsu pašvaldība, tiek apkalpota no Limbažiem... Ja mēs gribam zināt, kas notiek Liepupē, tad jāzvana uz Limbažiem" (Salacgrīva).

Tādējādi redzam, ka savu iespēju robežās Ziemeļvidzemes novadu pilsētu pašvaldības cenšas uzturēt pievilcīgu kultūrvidi, saglabāt esošās skolas, uzlabot transporta pakalpojumus, uzturēt infrastruktūru, kā arī veic citus pasākumus, lai nodrošinātu pilsētu sociāli ekonomisko attīstību.

Secinājumi

1. Pēc administratīvi teritoriālās reformas lielākā Latvijas mazpilsētu daļa ir kļuvusi ne tikai par jaunizveidoto novadu administratīvajiem, bet arī ekonomiskās un sociālās attīstības centriem.
2. 20.gs.beigās izveidojās t.s. kompleksā pieeja attīstības pētīšanai, kuru var izmantot kā metodoloģisku pamatu teritoriju sociāli ekonomiskās attīstības pētīšanai arī Latvijā.

3. Ziemeļvidzemes novadu pilsētās attīstās galvenokārt tradicionālās ražošanas nozares: kokapstrāde, lauksaimniecības produktu pārstrādā, piensaimniecība, zivju pārstrāde u.c. Atsevišķās pilsētās attīstās mājražošana, pēc kuras produkcijas ir pieprasījums arī ārzemēs.
4. Pašvaldības atbilstoši savām budžetu iespējām un attīstības perspektīvām atbalsta uzņēmējdarbības attīstību. Lai uzlabotu vietējo pašvaldību un uzņēmēju sadarbību, daudzviet ir izveidotas uzņēmēju padomes, kas pilda konsultatīvas funkcijas.
5. Kā attīstību veicinoši faktori tika minēti sakārtota infrastruktūra, izglītības pieejamība un kvalitatīva kultūrvide.
6. Galvenie attīstību kavējošie faktori ir iedzīvotāju novecošana un aizplūšana uz ārzemēm vai lielajām pilsētām, valsts iestāžu radītie birokrātiskie šķēršļi, līdz galam nepārdomāta administratīvi teritoriālā reforma, kā arī vispārēja neuzticēšanās politiskajiem institūtiem.

Izmantoto literatūras avotu saraksts

1. Latvijas ilgtspējīgas attīstības stratēģija līdz 2030.gadam. (2010). Rīga: Latvijas Republikas Saeima. http://www.latvija2030.lv/upload/latvija2030_saeima.pdf (Sk. internetā 02.06.2011.)
2. Lefebvre H., 2009. The Production of Space. Malden, Oxford, Victoria: Blackwell Publishing. 454p.
3. Perry B., Harding A., 2002. The Future of Urban Sociology: Report of Joint Sessions of the British and American Sociological Associations. International Journal of Urban and Regional Research, Vol. 26.4, December, 844- 853.
4. Pike A., Rodriguez-Pose A., Tomaney J., 2009. Local and Regional Development. London, New York: Routledge. 310p.
5. Пирогов С.В., 2003. Конспект лекций по курсу Социология города. Томск: Томский Государственный университет. 149с.
6. Regional Identity in the Information Society, 2004. BISER Domain Report No.4. 38 p.
7. Reģionu attīstība Latvijā. 2009, 2010. Rīga: VRAA. www.vraa.gov.lv/uploads/Regionu_attistiba_Latvija_2009.pdf (Sk. internetā 18.06. 2010.)

THE EVALUATION OF A TOWN'S ATTRACTIVENESS: A CASE STUDY OF BALVI CITY

Dr.oec. Lienite Litavniece
Associate professor of Faculty of Economics of Rezekne Higher Education Institution
N. Rancana street 6-19, Rezekne, LV-4601, phone: +371-29298800, e-mail: litavniece@inbox.lv

Abstract. When encouraging polycentric development and thinking about the sustainable development of cities, there is an increased necessity to carry out a much broader evaluation of territories within one research. Such an opportunity is offered by evaluation of the attractiveness of cities. It is a comparatively new category of economic research. Within the framework of the ESF-financed project "Lingual-Cultural and Socio-Economic Aspects of Territorial Identity in the Development of the Region of Latgale", research was done with a view to determine the criteria that would enable researchers to evaluate the attractiveness of cities (on the basis of impartial and subjective data).

The arrangement and evaluation of territories in the aspects of life quality or competitiveness is as essential for the inhabitants (evaluating the level life quality) as for tourists (evaluating safety level) and entrepreneurs (evaluating investment environment). Therefore, the users of results of this research are interested in a certain aspect, but each of them individually does not give a comprehensive concept of the particular territory. In researching city attractiveness, focus is not only on inter-comparison or cities, but an opportunity is also given to find uniqueness or competitive advantage that can help to facilitate its economic growth or to eliminate substantial factors that hinder development. Relevant in research of city attractiveness are the subjective data that show the level of contentment, and such data can be obtained as a result of polling the inhabitants.

Employment and contentment are mutually correlating features, but the latter correlates also with city attractiveness. In the research, attention will be devoted to the significance of research of city attractiveness and analysis based on the aspect of employment.

Key words: attractiveness of the town, Balvi, satisfaction with life in the town, the Latgale region, employment

Introduction

Attraction of inhabitants, tourists and investors is one of the significant territory's development potentialities. Each of these groups can facilitate inflow of financial resources and the economic activity. These are preconditions for the sustainable territory's development.

Polycentric development of late years has become the topic of the day in Latvia and in the European Union (*further – the EU*) because it is interlinked with successful implementation of regional policy. In the center of this way of development is the town as a territorial unit which by using its resources (human, nature, financial) provides its economic growth and supply of services of full value.

Significance of the evaluation of territory's competitiveness is rising. For the evaluation of the town's, region's or country's competitiveness new practical researches and scientifically grounded methodologies appear. As a result of it the towns researched are ranked or the corresponding indexes are allocated which users are the potential investors, inhabitants or tourists. The most popular researches about the territories are related to the quality of life (shown as a

complex or definite sphere evaluation), investments, touring products etc. The aim of the research or the target audience defines its comparatively narrow sphere of the researches.

Each investor after coming to the particular town becomes a part of this territory and not only the investment's environment he thinks to be exciting but also the quality of life. Substantially, the above mentioned researches are planned for the user of this information – the investor, inhabitant or tourist. As a result of this not enough attention is paid to the town, region or country, the territory is not researched all-in-all.

Updating the question about the polycentric development of towns also increases the role of a town, as a territorial unit, development in a region, country and the EU. Accordingly in the practical literature (the normative documentation, planning documents and the like) and scientific literature proposals for new terminology and its interpretation start to appear, for example, city marketing, city image, perfect city, city attractiveness, 'ghost' city etc. The attention is focused on a particular city, its necessities, development potentialities that are offered to the town's existent and potential 'users'.

The aim of the article is to find out the possible aspects of town's attractiveness valuation on the basis of theoretical literature and the Balvi inhabitant's questionnaire.

The tasks of the research: to search theoretical literature about the town's attractiveness; by using the data of the Balvi inhabitant's questionnaire, with the help of statistical calculation, to investigate the town's attractiveness evaluation possibilities.

Research methods

In this research the synthetic and analytic methods are used. The data of the Balvi town inhabitants' questionnaire is the basis of this article. The questionnaire was performed from October 2010 up to January 2011within the project 'Lingual-Cultural and Socio-Economic Aspects of Territorial Identity in the Development of the Region of Latgale' financed by the ESF. In Balvi 139 inhabitants took part in this questionnaire but 131 questionnaires were valid. Not all of the respondents came up with all the questions of the questionnaire therefore in the article the number of the respondents is shown that is marked as 'n'.

Characterization of the questionnaire's respondents:

- By gender: 26% men and 74% women;
- By educational level: higher education 40.5%; secondary education 25.2%; vocational education 23.7%; elementary education 9.9% and 0.8% did not answer to this question.

- By occupation: 48.1% paid employment; works, self-employed person 4.6%; do not work, unemployed 35.9%; leave for child care 0.8% and 10.7% other answer (pupils, students, pensioners).

SPSS program was used for the data processing, with help of which the Spearman correlation rate's calculations were done, charts and pictures formed (graphical method was used).

Results and Discussion

A question then derives what a town's attractiveness is. In the scientific literature there is no unified term definition and also there is no explanation for the town's attractiveness. For example, in the Charter of European cities a concept 'perfect city' is used. In other words, it is important to show and understand how the town has to 'look' in the economic, visual, social etc. spheres in order to take this town as the ideal or attractive. In the research the author uses the concept 'town's attractiveness'.

The town's attractiveness is a comparatively new category of the economic researches which practical part can be seen as methodology for valuation of corresponding territories. Within the previously mentioned project 14 towns of Latgale were researched (they match the categories – national, regional, district consequence) using the objective and subjective data and finally giving a methodology with help of which could the town's attractiveness be evaluated.

The most interesting is the fact that characterizing the town's attractiveness the factors are used. Also within this question there is no consequence. So what are these factors with help of which it is possible to characterize the corresponding town's attractiveness? In the previously mentioned Charter of European cities it is marked that it has to be a perfect place for '*traffic, living working and leisure requirements'*. (European Urban Charter, 1992). The European Commission in their announcement in 2006 to the Parliament and Council emphasizes the city as a center of working place formation to which skillful employees are recruited but it is possible only if there is city's *attractiveness in the spheres of transport, services, environment and culture* (The announcement of the Policy of cohesion and cities, 2006).

Irma Neminei proposes to research the city's attractiveness from six sight points: *business policy, basic services, pleasant environment and the housing policy, traffic, something special and economy of the city.* (Neminei, 2004)

L. van den Berg (alone or with co-authors) has performed many comprehensive researches about the city attractiveness, long-term development, city marketing. In his researches he

emphasizes significance of the city attractiveness in long-term development and defines various factors for target users of each city. The city attractiveness in view of inhabitants is characterized as *good, affordable dwellings in a clean and safe environment, availability and diversity of employment and a generous supply of high-grade services related to education, culture, health care, relaxation, shopping, religion and social security*. (Berg, Meer, Oligaar, 2006) For investors the place is emphasized as an attractiveness factor that can be characterized as availability *of space, land prices, tax rates and other legal regulations, the quality and quantity of the labor supply, the presence of other establishments (suppliers and customers), the market demand, the status of a location, the quality of the living environment and the presence and quality of services in the close vicinity*. (Berg, Meer, Oligaar, 2006) The city attractiveness in view of tourists is *presence of and access to primary as well as complementary tourist products.* (Berg, Meer, Oligaar, 2006)

It has to be concluded that the research of the city attractiveness includes a wide range of questions that are confirmed by the previously mentioned examples. In the author's opinion, some factors and their role can vary depending on the immutable factor – the size of the city and the mutable factor influence – economic, political, and social. Also important is the information that is used to clarify the level of particular city's attractiveness. Using the objective (statistic information) and subjective data (questionnaires, interviews) it is possible to maximum precisely define the level of city's attractiveness. The statistic information is based on definite calculation methodologies, also mathematic calculations and it does not show the human factor – thoughts, opinion, and satisfaction etc. that are significant for the evaluation of attractiveness.

On the basis of the questionnaire's data of the Balvi town inhabitants, the author researched whether there are any statistically significant correlations with probability of 95% or 99% between the indications:

- satisfaction with life in town and attractiveness of town characteristics;
- satisfaction with life in town and considering to work abroad;
- attractiveness of town characteristics and satisfaction with life in town;
- attractiveness of town characteristics and considering to work abroad;
- considering to work abroad and satisfaction with life in town;
- considering to work abroad and attractiveness of town characteristics.

Using the SPSS program the correlation coefficient's calculations between the variables were done.

From the findings (Table 1) it can be seen that between the variables satisfaction with life in town and considering to work abroad exists a weak negative correlation r = -0,217 with a

probability of 95%. These results testify that by diminishing of desire of Balvi inhabitants to go abroad to find a job, satisfaction with town increases. Wherewith in the aspect of the town's attractiveness research it can be considered that migration of inhabitants is one of the indicators that gives a percept with tendencies of the satisfaction's level in the town with the variable of 95%. Between the variables satisfaction with life in town and attractiveness of town characteristics there is a weak positive correlation r=0,341 with the variable of 99%. Causation between these indications enables to draw a conclusion that with the variable of 99% it can be asserted that increase of level of satisfaction with life in Balvi town enables to conclude that the town's attractiveness is increasing. The research of the town's attractiveness cannot be performed only on the basis of the causations mentioned above. Still as a result of regular researches it is possible to define the tendencies of the town's attractiveness.

Table 1

Correlations

(calculations done by the author with the program SPSS according to the data of Balvi town inhabitant's questionnaire)

			Satisfaction with life in town	Attractiveness of town characteristics	Considering to work abroad
Spearman's rho	Satisfaction with life in town	Correlation Coefficient	1,000	,341**	-,217*
		Sig. (2-tailed)	.	,000	,021
		N	12	129	113
	Attractiveness of town characteristics	Correlation Coefficient	,341**	1,000	-,093
		Sig. (2-tailed)	,000	.	,321
		N	129	131	115
	Considering to work abroad	Correlation Coefficient	-,217*	-,093	1,000
		Sig. (2-tailed)	,021	,321	.
		N	113	115	115

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

From the empiric calculations it can be concluded that one of the aspects that affect the satisfaction with life in town is the employment. The author thinks that the employment can be considered as one of the significant aspects that describes the town's attractiveness. In the Regulation of the European Parliament and of the Council on the European system of national and regional accounts in the European Union the concept 'employment' includes all persons that

participate in productive activity that is a part of the manufacturing within the national accounts. The employed persons are hired workers or self-employed persons. (Regulation of the European system of national and regional accounts in the European Union, 2010)

It follows that the employment can be characterized with statistic data which show the number of employed persons in the labor market. Usually such information is batched by the Central Statistic board and it is publicly available (for example, according to the CSB data of 2010, the average employment level in towns of Latvia was 53.1%). Though, the employment characterizing quantitative showing is not enough in order to evaluate the town's attractiveness in this aspect. Therefore the author uses the data from the questionnaire of Balvi town's inhabitants in order to clarify correlation between the employment and town's attractiveness. As the null hypothesis it is advanced that there exists a direct connection between the satisfaction and the town's attractiveness.

Table 2

Correlations

(calculations done by the author with the program SPSS according to the data of Balvi town inhabitant's questionnaire)

			Satisfaction with life in town	Attractiveness of town characteristics	Occupation
Spearman's rho	Satisfaction with life in town	Correlation Coefficient	1,000	,341**	,225*
		Sig. (2-tailed)	.	,000	,010
		N	129	129	129
	Attractiveness of town characteristics	Correlation Coefficient	,341**	1,000	,141
		Sig. (2-tailed)	,000	.	,109
		N	129	131	131
	Occupation	Correlation Coefficient	,225*	,141	1,000
		Sig. (2-tailed)	,010	,109	.
		N	129	131	131

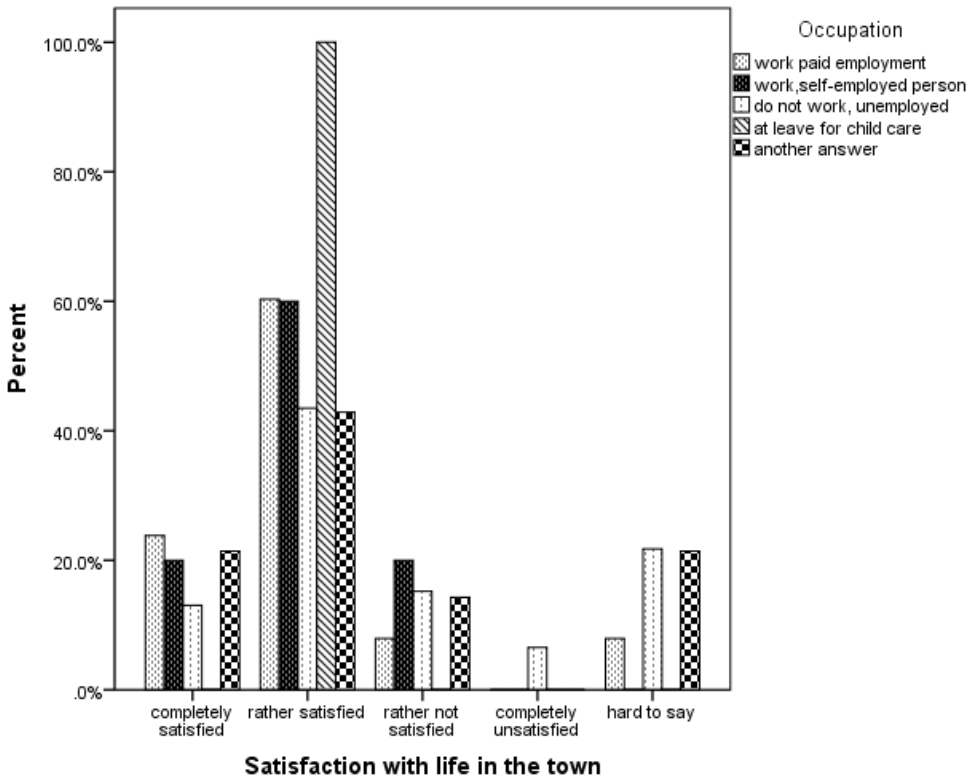
**. Correlation is significant at the 0.01 level (2-tailed).

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

The empiric calculations show that a direct statistically significant probability between occupation and attractiveness of town characteristics does not exist. Wherewith, the null hypothesis is rejected. Though a weak positive correlation r=0.225 with probability of 95% exists between occupation and satisfaction with life in town. That means that by increase of employment, the satisfaction with life in town also increases. Wherewith, by analyzing the data of the questionnaire the level of satisfaction can be used in the corresponding sphere and accordingly interpreted the results obtained can be related to the town's attractiveness.

Analyzing the satisfaction with life in Balvi town according to occupation of the respondents (image 1) it can be concluded that in general 72.09% of the respondents' answers can be categorized as 'completely satisfied' and 'rather satisfied' that indicates that the majority of the respondents are satisfied that is ensured by the well organized infrastructure, sport and recreation facilities.

Analyzing according to the occupation (image 1) it can be concluded that 84.13% of people working paid employment feel satisfied with life in the town. That confirms the previously obtained empiric results. 56.52% respondents that are unemployed or do not work are 'completely satisfied' and 'rather satisfied' with life in the town. However, exactly 21.74% respondents of this category cannot evaluate the level of satisfaction (it is hard to say). The author considers that it could be explained with the situation when a person who is unemployed or does not work is in the dark about his future. Therefore evaluation of the satisfaction with life in the town is very hard. Though, exactly this situation confirms that the satisfaction with life in the town may not and cannot be evaluated using only one aspect.

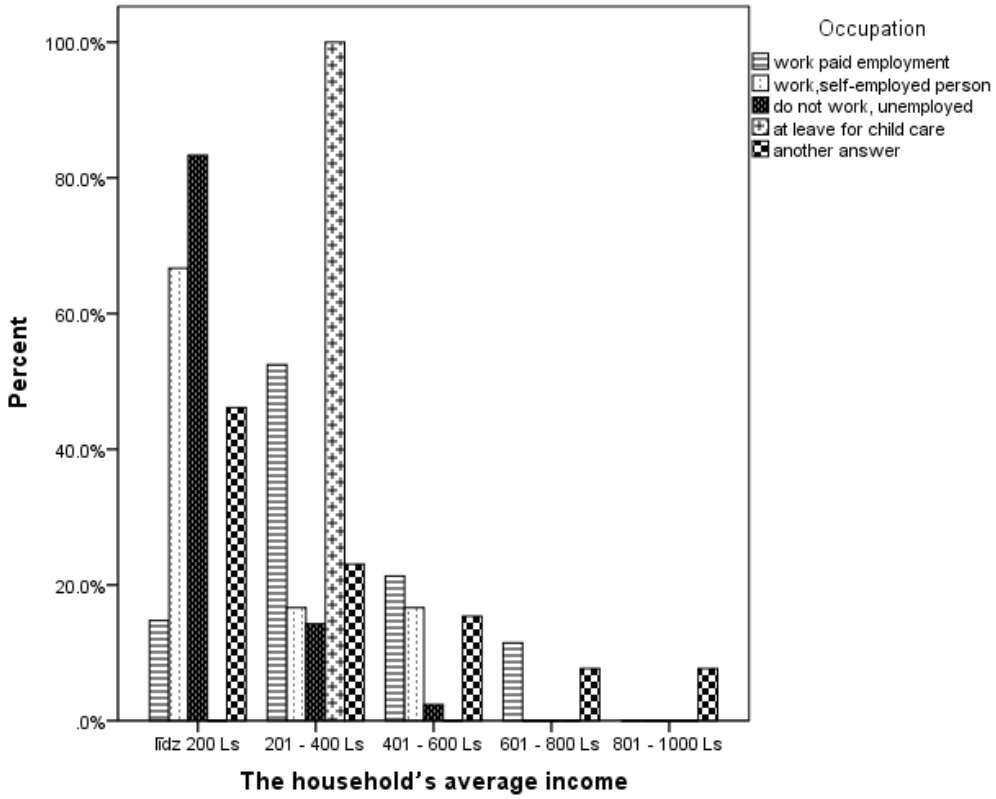


Source: calculations done by the author with the program SPSS according to the data of Balvi town inhabitant's questionnaire

Image 1 Satisfaction with the life in Balvi town and occupation of the respondents, n=129

Characterizing employment, the income level is also a very significant factor (see image 2). 43.90% respondents the average income for a household is up to Ls 200, the major dominance in this category are unemployed or people that do not work – 64.81%. Also the empiric calculations testify that there is a weak negative correlation r=-0,455 with the probability of 99% between the occupation and the household's income level. By decrease of inhabitants' employment, the average income for a household is decreasing correspondingly. As a result of chain reaction, correspondingly decreases the level of satisfaction and town's attractiveness.

52.46% respondents (image 2) that work paid employment the average income for a household is between Ls 201 – 400. This can be explained both with the level of average salary for people working in the public sector, and also with the minimum salary level in the country.



Source: calculations done by the author with the program SPSS according to the data of Balvi town inhabitant's questionnaire

Image 2 Occupation and the average income for a household, n=123

The level of income and employment do not have a direct impact on the town's attractiveness researches though they are background factors which analysis gives a more complete and profound percept about the town's development tendencies and potentialities.

Conclusions

1. Researches of town's attractiveness are significant and with help of them it is possible to carry out a complex evaluation of the territory using different significant criteria for all target groups.
2. The town's attractiveness correlates with the level of satisfaction (r=0.341) that means that it is a way how to form a questionnaire so that the data could be used for the measurement of the town's attractiveness.

3. There is no direct correlation between the employment and town's attractiveness but using the data about the satisfaction with life in the town it is possible to define the influence of employment on the town's attractiveness.
4. Employment affects satisfaction of the Balvi town's inhabitants.

References

1. Regulation of the European Parliament and of the Council on the European system of national and regional accounts in the European Union. Appendix A /chapter11. COM (2010) 774 final formulation.
2. The announcement of the Commission to the European Council and Parliament – Policy of cohesion and cities – The significance of the cities and agglomeration in the regional development and in creation of work places {SEC(2006)928}/*COM/2006/0385 final formulation*/ (06.06.11.) http://eur-lex.europa.eu/Result.do?idReq=2&page=2
3. *European Urban Charter*. (1992) Sustainable Cities and Towns Campaign. Page 11. http://sustainable-cities.eu/upload/pdf_files/URBAN_CHARTER_EN.pdf (06.06.11.) (60 lpp)
4. Home page of the Central Statistic board. http://data.csb.gov.lv/Dialog/Saveshow.asp CSB the level of economic activity, employment, specific weight of people searching employment (%)
5. Berg, L. van den; Meer, J. van de; Oligaar, (2006) A. The attractive city: Catalyst of Sustainable Urban Development (485.-491.) http://www.euskomedia.org/PDFAnlt/congresos/16/16485491.pdf (09.06.2011)
6. Neminei, I. *The Attractive City – Urban Quality and Social Responsibility in Salo (2004)* http://www.mecibs.dk/Artikler/Conf3_presentations/Konference_presentations/Irma%20Nieminen/The%20attractive%20city.pdf (09.06.2011.)

PROJECT MANAGEMENT COMPETENCES NEEDED: AN ANALYSIS OF PRELIMINARY WISDOM OF APPLICATION OF ESTONIAN RECONSTRUCTION ACT

Airi Noppel –Specialist, Pärnu College, University of Tartu – Ringi 35 80010 Pärnu, Estonia Tel +372 44 505 31 e-mail airi.noppel@ut.ee
Arvi Kuura – Senior Lecturer of Entrepreneurship, Pärnu College, University of Tartu – Ringi 35 80010 Pärnu, Estonia Tel +372 52 87 321 e-mail arvi.kuura@ut.ee

Abstract
This paper is intended to explore the essential need for project management competences in reconstruction of companies. On 26 December 2008 the Reconstruction Act (in Estonian *Saneerimisseadus*, translated also as Reorganization Act and Rehabilitation Act) was forced in Estonia. This was quite a „revolutionary" development in the insolvency-related business regulations and thus in the whole business environment in Estonia.
In this paper we examine the Estonian Reconstruction Act and carry out a cross-case analysis of accumulated empirical experience and existing court practice in Estonia. Our methodical approach (particularly for the first task) is following the new institutional and behavioural economics, namely the economic analysis of law. Our main working hypothesis is that the process of reconstruction has the typical attributes of a project and thus, its implementation requires application of specific tools and techniques which are used in project management. The only logical deduction is that the managers of the reconstruction process must have (at least basic) competences of project management. We examine the need of specific project management competences across all the three competence areas and 46 competences of IPMA International Competence Baseline and prevail upon that not only technical, but also contextual and behavioural competences are necessary. Also we pay attention to possible policy implications, showing that successful reconstructions can make the Schumpeterian „creative destruction" less „destructive" and more „creative" and thus influence sustainability.
Keywords: Business reconstruction, Project Management, Competences

Introduction

The purpose of reorganization law is to provide an insolvent debtor with a limited but reasonable period of time within which to develop a plan and present it to its creditors, who must decide to whether to accept or reject it (Saneerimisseadus, 2008). When the act was entered into force, even The World Bank reflected it in their annual report (The International…, 2009). The objectives of rehabilitation can be summarized as rescuing financially distressed firms, maximizing the values of assets for creditors, and protecting the public interest. But the overall economic objective of rehabilitation procedures is to enable a financially distressed enterprise to become a competitive and productive participant in the economy, thereby benefiting not only the main stakeholders of an enterprise (owners, creditors, and employees) but also the economy more generally (IMF, 1999). Thus, successful reconstructions can make the Schumpeterian

„creative destruction" less „destructive" and more „creative" and thereby increase the overall sustainability in the whole economy and society.

Our main working hypothesis is that the process of reconstruction has the typical attributes of a project and thus, its implementation requires application of specific tools and techniques which are generally used in project management. The only logical deduction is that the managers of the reconstruction process must have (at least basic) competences of project management. We examine the need of specific project management competences across all the three competence areas and 46 competences of IPMA International Competence Baseline and prevail upon that not only technical, but also contextual and behavioural competences are necessary.

Research Methods

The methodical approach (particularly for the first task) is following the new institutional and behavioural economics, namely the economic analysis of law. Our empirical data are derived from an inquiry which was conducted in spring 2010 among the 80 potential reorganization advisers (Noppel, 2010). The inquiry included also a question about competences that the reconstruction adviser needs.

Project and Reorganization

The reorganization of an enterprise means the application of a set of measures in order for an enterprise to overcome economic difficulties, restore it´s liquidity, improve profitability and ensure sustainable management (Saneerimisseadus, 2008). That means an organization cannot continue its normal activity without concurrent difficulties. The role (and even existence) of projects in organizations has actually not yet found total consensus in academic literature. For instance, Turner, Grude and Thurloway (1996) pointed out that organizations undertake projects when they can achieve their business objectives more effectively than by doing routine things and when the potential benefits outweigh the risk. Cleland and Ireland (2006) stated that project management has been used to create change or deal with change in societies since ancient times. Lindgren and Packendorff (2003) proposed a project-based view of entrepreneurship, where the main characterizing keyword is seriality. The last is actually well-known in entrepreneurship literature as serial entrepreneurship, representing one kind of habitual entrepreneurship (see, for instance Ucbasaran *et al*. 2008). And recently, Kuura, Blackburn and Lundin (2011) scrutinized the relations of entrepreneurship and project management and emphasized that "… certain stages in life cycle of every business – like (re-)development, relocation, renewal, etc. – meet the substantial criteria of a project and therefore should be treated as projects." (ibid: 15). Lukason (2008) also interprets reorganization as a process which has an influence on the organizational activity and the company could act more or less effectively.

There is not (yet) a uniform definition for a project or a programme or for project management and we will not go into discussion of a „right" definition. Here we rely on definition of IPMA[11] (2006) stating that "A project is a time and cost constrained operation to realize a set of defined deliverables up to standards and requirements". More and more projects of different kinds are managed professionally. For instance, there are projects in organizational development and legislation (IPMA 2006).

IPMA (2006) has also spotlighted the main issues in projects and prorgammes and differences between them from a management perspective. In order to show that reorganization has typically to deal with the same issues, we constructed the counterparts of projects/programmes in the reorganization, as presented in Table 1 (the third column).

Table 1. Project, programme and reorganization: main issues and differences

	project	**programme**	**reorganization**
The goal (of a)	is to produce deliverables	is to achieve strategic change	is to ensure sustainable management for a company
Vision and strategy	are related through the business case of a project	are realized by a programme	are realized by reorganization plan
Business benefits	are largely excluded from a project	are largely included in a programme	are largely included in a reorganization
Organizational change	is often excluded from a project	is usually included in a programme	is usually included in a reorganization
Time, cost	are defined in the business case and are manageable in a project	are roughly defined within the strategy; are broken-down to individual projects within the programme	are defined in the reorganization plan

Sources: IPMA 2006; authors (reorganization).

Looking at the issues related to projects and programmes and their counterparts in reorganization (Table 1) we can say that (according to general understandings) reorganization has even more similarities with a programme than a project. This is explicitly apparent in terms of the goal, vision and strategy, business benefits and (most probably) also organizational change. Yet, in terms of time and cost it is more similar to a project; and treating reorganization as a programme (consisting of several projects) may not be necessary in most cases.

Reorganization act (Saneerimisseadus, 2008) also names "project", standing for rehabilitation plan. In general understandings, this is a project proposal and/or a project (management) plan, to be accepted and approved by those involved and communicated to the relevant interested parties (IPMA

[11] International Project Management Association (www.ipma.ch)

2006). According to the law, a rehabilitation plan also needs an approval of creditors (Saneerimisseadus, 2008).

It is useful to note here that the meaning of a project as a plan (scheme, design, etc.) is historical, leading back to the early roots of projects in engineering (see Cleland & Ireland 2006).

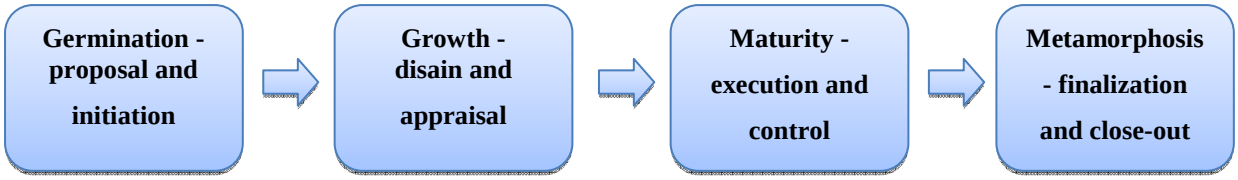


Figure 1. The four-stage life cycle of a project (Turner, 1999).

In germination phase reconstruction process begins with the problem identification or cognition of the risk. The adviser shall immediately obtain information about the economic situation and the planned reorganisation of the enterprise. In the growth stage reorganization adviser (with organization management) shall promptly notify the obligees of commencement of reorganisation proceedings and the amount of the claims that they have against the undertaking according to the list of debts. The third stage in reconstruction process includes implementation of the rehabilitation plan, monitoring and reporting to the court. Then adviser analyses the solvency of the undertaking during reorganisation proceedings and, if insolvency has become evident, notify the court and the undertaking promptly thereof. In the last phase of the reorganization process finalization and close-out are needed.

Reorganization Adviser as a Project Manager

A reorganization adviser has a very important role during the process because the course of company"s reorganization proceeding depends greatly on his/her knowledge and skills. It has been argued (Noppel, 2010) what skills should a good adviser have and concluded that there is a need for extensive knowledge of economics, legal and management issues. One must admit that there are a lot of requirements for one person but the charge is also in correspondence with the work, i.e. sufficiently motivating.

The debtor usually selects the person to act as a monitor or a trustee. Estonian Reorganization Act (Saneerimisseadus, 2008) validates that reorganization advisers can be:

1) sworn advocates, sworn advocates's senior clerks[12], auditors and trustees in bankruptcy;

2) other natural persons who are honest and of moral character, and who are proficient in oral and written Estonian, who possess good economic and the necessary legal knowledge and who have been awarded an officially recognized Master's level degree;

[12] Often called „attorney at law and „assistant attorney at law.

3) investment firms and credit institutions.

There has been considerable debate about who is the best adviser in rehabilitation procedure. In Estonian practice court usually appoints an attorney or trustee in bankruptcy as an adviser. Some of the parties had doubts about the advisability of this action. Herewith we want to point out a risk – trustees in bankruptcy as reorganization advisers may tend to turn the reorganisation into bankruptcy – because this process is more familiar to them and also may be more quicker and easier for other involved parties, especially for (some) obligees. Obviously, this will not make the Schumpeterian „creative destruction" less „destructive" and therefore, will not be the best for many involved parties, from the owners-managers to the whole society.

IPMA chose the project management competences from three ranges: the technical range, the behavioural range and the contextual range (IPMA 2006) and those ranges are divided into different elements.

Technical competences include (*ibid.*): project management success, interested parties, project requirements & objectives, risk & opportunity, quality, project organization, teamwork, problem resolution, project structures, scope & deliverables, time & project phases, resources, cost & finance, procurement & contract, changes, control & reports, information & documentation, communication, start-up and close-out. Reorganization adviser needs at least level B of effective technical competence, which means he/she has to have shown effective application of the technical competence elements in complex project situations and within the scope of the project. It is very important, that the adviser should identify all the interested parties, what their interests are, and sequence both in order of importance to the project. At least same important competence as the last mentioned, is reorganization cost and change management. It is self-evident that reorganizer need a good contract management skills. Due to the fact that the implementation period of reorganization act is too short and there is no proper judicial practice, adviser has to have very good communication abilities.

Behavioural competence elements are (*ibid.*): leadership, engagement & motivation, self-control, assertiveness, relaxation, openness, creativity, results orientation, efficiency, consultation, negotiation, conflict & crisis, reliability, values appreciation and ethics. The descriptions of effective behavioural competence of a reorganization manager have also been described in level B: he/she has to have shown effective application of the behavioural competence elements in complex project situations and within the scope of the project. Reorganization project is so important to the companies involved that there is no space to failure or need for guidance.

Contextual competence elements are (IPMA 2006): project orientation, programme orientation, portfolio orientation, project, programme & portfolio implementation, permanent organization, business, systems, products & technology, personnel management, health, security, safety & environment, finance and legal competence. The descriptions of effective contextual competence at level B state that he/she has to have shown effective application of the contextual competence elements in complex project situations and related to its scope. Undoubtedly, we can say that advisers finance and legal competences are essential for survival of the company.

The requirements to a reorganization adviser and his/her fee are high because the specialist chosen by an undertaker and later approved by the court will incur high financial costs to the company involved. The inquiry (Noppel, 2010) revealed that the most important competences are management skills and after that comes economical and legal competences (see Figure 2).

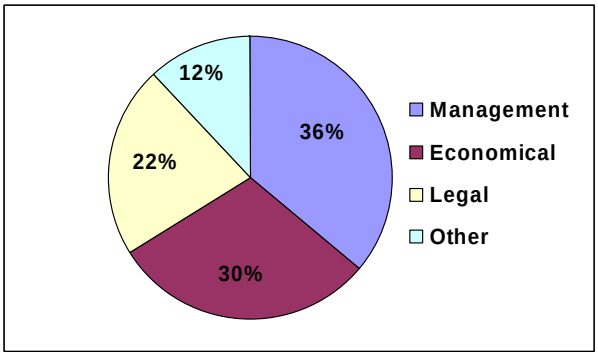


Figure 2. Reorganization advisers competences needed (Noppel, 2010).

Restructuring proceedings may involve intense negotiations between the debtor and the creditors. During the negotiation stage, the draft plan may be significantly modified. The most important role in this negotiation is reorganization manager´s communication competences, which confirms the conclusion reached earlier.

The total competence required per range should be split between the ranges in the following proportions (See table 2).

Table 2. Weighting of competence ranges of project managers by IPMA ICB and reorganization advisers

Competence range	IPMA Level A %	IPMA Level B %	IPMA Level C %	IPMA Level D %	Reorganization advisers %
Technical	40	50	60	70	20
Behavioural	30	25	20	15	30
Contextual	30	25	20	15	50

Sources: IPMA 2006; authors (Reorganization advisers).

Weightings of competence ranges of reorganization advisers above are rough and perceptual and basing on logical deductions. As seen in Table 2, the reorganization advisers are most similar to IPMA Level A („*Certified Projects Director*" – IPMA 2006) but good contextual competences are even more important. This is mainly because of two competence elements – business (or business case) and permanent organization.

Moorhead (2010) is convinced that although all professionals are specialists (lawyers "specialize" in "law"), there is now a growing sense that general professional status may not always be sufficient to render lawyers competitive or competent. That brings us to the aforementioned topic if the trustee in bankruptcy or a sworn advocate is the best reorganization adviser.

Conclusing remarks

The first part of the article explored the project and reorganization as a process. Our main working hypothesis was confirmed and we are now convinced that the process of reconstruction has the typical attributes of a project. The only logical deduction is that the managers of the reconstruction process must have the same competences as project manager. We examined the need of specific project management competences across all the three competence areas and can conclude that a reorganization adviser needs not only technical, but also contextual and behavioural competences.

References

1. Cleland, D., Ireland, L. (2006). The Evolution of Project Management. In: *Global Project Management Handbook: Planning, Organizing, and Controlling International Projects.* 2nd Edition. Ed. by D. Cleland & R. Gareis. McGraw-Hill.
2. IMF. (1999). Orderly & Effective Insolvency Procedures. Key Issues. Available at: http://www.imf.org/external/pubs/ft/orderly/#foreword.
3. IPMA. (2006). *International Competence Baseline (Version 3.0).* Available at: www.ipma.ch.
4. Kuura, A., Blackburn, R., Lundin, R. (2011). On Practices: Linking Projects and Entrepreneurship. Paper to be presented at the 21st conference of Nordic Academy of Management, Stockholm, August 2011.
5. Lindgren, M., Packendorff, J. (2003). A project-based view of entrepreneurship: Towards action-orientation, seriality and collectivity. In: *New movements in entrepreneurship*. Ed. by C. Steyaert, D. Hjorth. Cheltenham, Edward Elgar.
6. Lukason, O. (2008). Saneerimismenetluse majanduslikud mõjud ja nende hindamine Eestis. Tartu. Available at:http://www.just.ee/orb.aw/class=file/action=preview/id=36637/Saneerimise+majanduslike+m%F5jude+hinnang_25.06.08.pdf.
7. Moorhead, R. (2010). Lawyer Specialization–Managing the Professional Paradox. - *LAW & POLICY*, 32 (2), pp. 226-259.
8. Noppel, A. (2010). Ettevõtte majanduslike raskuste ületamine saneerimismenetluse kaudu. *Diploma thesis.*
9. Saneerimisseadus. (2008). *Estonian Reorganization Act.* Available at: https://www.riigiteataja.ee/akt/13264880.
10. The International Bank for Reconstruction and Development/The World Bank. (2009). *Doing business 2010: Estonia – comparing regulation in 183 economies.* Available at: http://go.worldbank.org/XHLWA43H50.
11. Turner, J.R. (1999). *The Handbook of Project-based Management.* 2nd Edition. McGraw-Hill.
12. Turner, J.R., Grude, K.V., Thurloway, L. (1996). *The Project Manager as Change Agent*. McGraw-Hill.
13. Ucbasaran, D., Alsos, G. A., Westhead P. and Wright, M. (2008) Habitual Entrepreneurs. – *Foundations and Trends in Entrepreneurship*, 4(4), pp. 309-450.

NEW BUSINESS IDEA DEVELOPMENT METHODOLOGY: CASE OF LATVIA AND ESTONIA

Liene Riekstiņa, Mg.oec., Ventspils University College, Inženieru Street 101a, Ventspils, LV-3601, liene.riekstina@venta.lv, +371 2408984
Valdis Avotiņš, Dr.chem., Ventspils University College, Inženieru Street 101a, Ventspils, LV-3601, valdis.avotins@venta.lv, +371 29240951

Abstract. Innovation is recognized as one of the main sources of economic competitiveness, job creation and wealth creation. According to the Innovation Union Scoreboard 2010, Latvia has the lowest innovation index compared with other EU countries. One of the main reasons for such a low innovation performance is the lack of new innovative business ideas. As crucial component of people's ability to innovate is creativity, our main task is to rise up the level of entrepreneurial creativity. This was implemented in the SIB Net project during four creativity seminars.
Aim of SIB Net project is to promote new innovative high growth firms by encouraging entrepreneurial creativity, providing needed support and evaluating needs for early stage risk finance. Ventspils University College is one of six partners responsible for creativity methodology design.
Series of creativity seminars included four ones aimed for encouraging entrepreneurial creativity to help idea holders to improve and develop their ideas into the real business plans. Participants of creativity seminars were new and nascent entrepreneurs, participants of cross border business idea competition organized within SIB Net project and also tenants of Business Incubators. Creativity seminar consisted of theoretical and practical part but emphasis was more put on practical part – working individually and in teams on creativity exercises and case studies. Almost 50 persons were trained to develop new ideas up to new commercial activities in these creativity seminars. Participants pointed out positive values of seminars: confidence, skills of entrepreneurial behavior, understanding of market opportunities, design of implementation plan.
Key-words: development of new business ideas, innovation, creativity, new firm

Introduction

Europe faces a momentum of transformation. The crisis has wiped out years of economic and social progress and exposed structural weaknesses in Europe's economy. In the meantime, the world is moving fast and long-term challenges – globalization, pressure on resources, aging – intensifies. In order to take charge of Europe's future Europe Commission has developed strategy "Europe 2020" that should help Europe come out stronger from the crisis and turn the Europe Union into a smart, sustainable and inclusive economy delivering high levels of employment, productivity and social cohesion (European Commission, 2010).

"Europe 2020" puts forward three mutually reinforcing priorities: smart, sustainable and inclusive growth. This paper will be connected with the first of previously mentioned priorities - smart growth: developing an economy based on knowledge and innovation, if precisely – how to create new innovative business ideas.

Results and discussion

Innovation is recognized as one of the main sources of economic competitiveness, job creation and wealth creation. If we look at the results of Innovation Union Scoreboard 2010, Latvia

has the lowest innovation index (0.20) among all EU countries (Figure 1). Our neighboring countries - Lithuania with the index value 0.23 and Estonia with the index value 0.47 have reached higher level of innovation development.

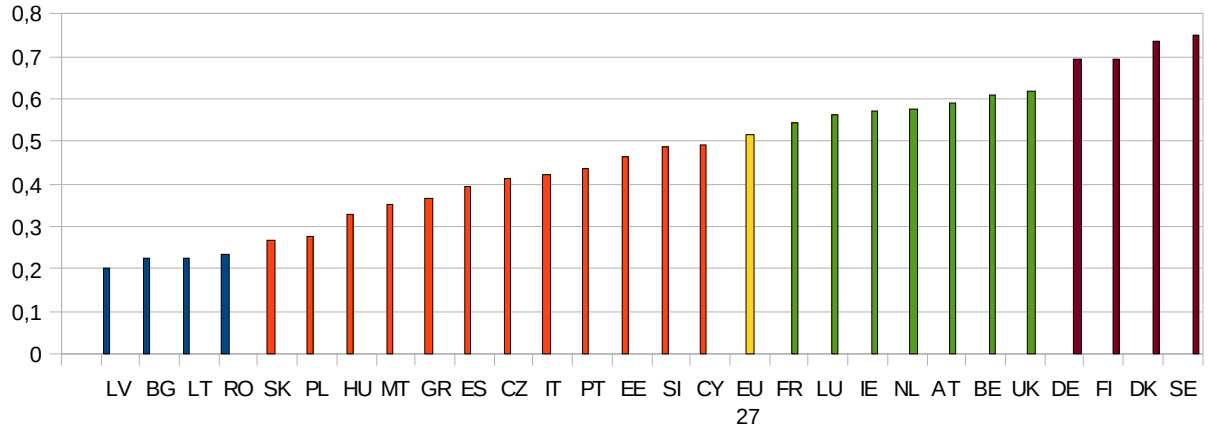


Figure 1: EU Member State's Innovation Performance
Source: Innovation Union Scoreboard 2010

According to the Research of Early Stage Financial Supply one of the main reasons for such a low innovation performance is the lack of new innovative business ideas. As crucial component of people's ability to innovate is creativity, our main task is to rise up the level of entrepreneurial creativity. This was implemented in the SIB Net project ("Small Innovative Business Promotion Network") during four creativity seminars.

SIB Net project

Aim of SIB Net project is to promote new innovative high growth firms by encouraging entrepreneurial creativity, providing needed support and evaluating needs for early stage risk finance. Project aims to solve identified common market failures in partner regions (Kurzeme, Riga and South Estonia) and release innovative spin-outs from regional research centers and Higher Education Institutions fuelled by partnership, mutual learning and mobility activities, and required external competence. There are involved six partners in the project: Riga Planning Region as a lead partner, Ventspils University College, Ventspils High Technology Park, Stockholm School of Economics in Riga, Tartu Science Park and Institute of Baltic Studies. SIB Net is co-financed by the Estonia Latvia Programme, including co-financing of European Regional Development Fund and national co-financing. Implementation period of the project: June, 2010 – May, 2012.

To reach the main aim project activities there were planed several activities connected with entrepreneurial creativity and development of new business ideas – design of the methodology of the organizing of creativity seminars, four creativity seminars, development of creativity and matching methodology and methodological guide to develop new innovative business ideas by using creativity and business acceleration methods. The first two of aforementioned activities has been performed, other two will be developed till the end of the project.

Creativity seminars

Series of creativity seminars included four creativity seminars – two in Riga, one in Ventspils and one in Tartu.

The first creativity seminar was organized on February 4th in Riga by Stockholm School of Economics in Riga (SSER). It was aimed to train the local experts – trainers of next three creativity seminars, and testing the practical part of the planned creativity seminars.

The second creativity seminar took place in Tartu on March 17th and 18th and it was organized by Institute of Baltic Studies (IBS). The third creativity seminar was organized by Ventspils University College (VUC) in Ventspils on March 24th. The fourth creativity seminar took place in Riga on March 25th and was organized by SSER.

Aim of the creativity seminars was by encouraging entrepreneurial creativity to generate new business ideas out of identified latent market opportunities. Creativity seminar was aimed to help idea holders to improve confidence and develop their ideas into the real business plans.

Participants of creativity seminars were new and nascent entrepreneurs, participants of cross border idea competition, organized in SIB Net project, and also tenants from Business Incubators. They represented very different areas of activities: from entertainment and sports to high technology with very different level of entrepreneurship skills. Their different problem-solving approaches revealed already in warm-up tasks – "Portrait of neighbor" and "12 circles".[13] Almost 50 persons were trained in creativity seminars to develop new ideas until new commercial activities.

Within creativity seminars participants learned:

- benefits of thinking "Out of the Box";
- tools for opening "The Box";

[13] Warm-up tasks had twofold objectives – to introduce participants each other and to initiate creative way of thinking

- tools for seeking and shaping opportunities;
- how to generate ideas alone or in groups;
- frameworks and criteria for evaluating new ideas;
- techniques for identifying and principles for overcoming blocks to implementation.

Creativity seminar consisted of theoretical and practical part but emphasis was more put on practical part – working individually and in groups on creativity exercises and case studies.

Creativity seminar started with the introduction with trainers, with agenda and purpose of creativity seminar. As warm up exercises were used tasks “Portrait of neighbour” and “12 circles”. In the first part of seminar participants were introduced with theory about creativity concept and creativity techniques. Six thinking hats model developed by E.de Bono (E.de Bono, 2009) also was presented. After theoretical introduction participants fulfilled creativity test “Testing left-brain/right-brain dominance” (Bragg A., 2002).

Second part of creativity seminar started with theory about new business idea development process, about first (seeking and shaping opportunities) and second (generating new ideas) steps in this process. Afterward participants were divided into groups of four people and started their work on first major task – case studies. Case studies prepared by project partners included aerial photography service provider, wooden toy manufacturer and furniture manufacturer. Participants provided different ideas and solutions for possible future actions to develop the businesses, expand operations and increase sales. After presentations it appeared that one of the seminar participants was founder of aerial photography company and an interesting discussion about provided ideas and actual developments of the company aroused.

The third step started with more theory on evaluating and selecting ideas and was followed byplanning for implementation (fourth step), where participants once more were gathered in teams to develop their own business ideas. Each group member presented his/her idea to other group members and group members worked together to synergize the ideas into one brilliant idea for further development. Initial ideas included provision of web services, IT solutions, organizing trips, straw briquettes, production of special shoes, fishing equipment, museum etc. Some of the winning ideas represented merged and improved ideas.

The last task in this seminar for participants was work in teams with development of one new business idea by going through all four steps and by using methods (recommendable) described previously. Groups picked one idea (submitted in the SIB Net cross-border idea competition or developed initially in these seminars) and organized then their work to go through

four idea development process stages with these business proposals. Finally each team provided the results of all their work stages in short presentations.

The evaluation from participants was positive on average. They evaluated the novelty of the seminar. Participants considered the seminar useful for them, they received usable knowledge. They were found of practical examples and road map given to develop their own ideas. They all were active and participated with passion in all activities. Especially they liked creativity exercises and team work. In the evaluations participants have mentioned some aspects that could be developed further on but in general the conclusion is that the methodology that was prepared in this project by VUC and SSER works fine and only some minor adjustments are needed.

Methodology of developing new business ideas

The idea development technique include four steps: seeking and shaping opportunities, generating new ideas, evaluating and selecting ideas and planning for implementation.

- *First step: seeking and shaping opportunities.*

The result of this first step is a much greater insight into the market which nascent entrepreneur is investigating, together with a sharper definition, or quite possibly redefinition, of the opportunity which he wish to size. Key to this step is awareness that those, who currently serve the market, have left gaps which could represent potential opportunities.

Methods for seeking and shaping opportunities: the “5 Ws plus H”, the lead-users technique, boundary-examination technique, boundary-hopping technique. (Bragg A., 2002)

- *Second step: generating new ideas.*

The techniques – use of stimulus materials, combinations, free association, upside-down thinking, analogical thinking and checklists – will help to generate a significant quantity of ideas which can be clustered into groups and carried forward to the next step. In this step quantity creates quality.

- Third step: evaluating and selecting ideas.

Frameworks to undertake this process include criteria grids, flowcharts, weighted criteria grids and the idea comparability matrix. The outcome of this step is the identification of the leading contender to be taken forward to the final step in the idea development process. As was the case with step two. Insights arising from ideas “rejected” at step three may yet provide the stimulus for further ideas and are fed back into earlier steps.

The best idea resulting from Step Three will be the one which not only offers the greatest chance of success in the market but also most closely matches ones own personal goals, skills, resources and appetite for risk.

- Fourth step: planning for implementation.

The fourth step explains how one can increase the likelihood of idea's success by identifying, and than resolving, potential blocks to implementation. Blocks will adopt many forms, from competitive reaction to lack of technical know-how, from lack of finance to inability to protect idea. A range of techniques exists to help identify the blocks specific to one's particular idea, including reverse brainstorming, force-field analysis and commitment charting. The very process of planning for implementation may lead to modification or refinement of the original business idea. At the conclusion of this fourth step, one will be ready to codify all the elements of one's business idea into a formal and fully fledged business plan.

Methodology used for generating new business ideas has presented its effectiveness. Created business ideas were involved in support processes for pre-incubator. Although it is too early to judge about vitality of created new business ideas, however achieved among scientists allows hopefully look at further application of developed methodology.

Conclusions

1. The lack of new business ideas is one of the main obstacles to promote new high growth innovative firms.
2. Entrepreneurial creativity is the keystone of people's entrepreneurial behavior, spirit and capacity to innovate.
3. Seminars (creativity seminars) with thought-out agenda, competent trainers and qualitative materials can substantially raise creativity of its participants and promote birth of new innovative business ideas.

References

1. Bragg A., Bragg M. Developing New Business Ideas. - USA: Prentice Hall, 2002, 266 pp.
2. E.de Bono. Six Thinking Hats. - Riga: Zvaigzne ABC, 2009. - 199 pp.
3. European Commission. Europe 2020. - Brussels, 2010, 37 pp.
4. Innovation Union Scoreboard 2010. http://www.proinno-europe.eu/metrics; accessed on August 29, 2011.
5. Methodology of the organizing of creativity seminars. SibNet project reports. Ventspils University College. - Ventspils, 2010, - 5 pp.

INFORMATION SOURCES ABOUT MEDICINES USED IN CASE OF CHILDREN'S RHINITIS

INFORMĀCIJAS AVOTI PAR MEDIKAMENTIEM BĒRNU IESNU GADĪJUMOS

Ieva Salmane- Kulikovska[1], Signe Dobelniece[2]
[1]Riga Stradins university, department of doctoral studies, program "Sociology",
Dzirciema iela 16, Riga, LV 1007,
e-mail: ieva.salmanekulikovska@gmail.com, tel.: 29277800
[2]PhD, Latvia University of Agriculture,
Lielā iela 2, Jelgava, LV 3001
e-mail: Signe.Dobelniece@ llu.lv

Abstract. Safety and efficiency of common cold medicines, including nasal decongestants, are doubted in respect to small children by a number of countries. In Latvia decongestants can mostlybe obtained without prescription, and patient information leaflets (PILs)generally permit using them for small children. The previous study (2010) in Latvia showed extensive use of decongestants for children and determined the necessity of deeper research. A qualitative study, enclosing 27 semi-structured interviews with caregivers having used nasal decongestants for children under six years of age, was performed in 2011.The decision to use decongestants is mostly made upon the suggestion of a doctor. Perceived informationfrom the doctors is diverse, and does not contain detailed description of possible side-effects. Other information sources are pharmacists, information in media, PILs, lay people, internet and medical nurses. Evaluation of the information sources is distinctive, ranking from trust to the opinion that most information sources about common cold medicines, including nasal decongestants, are commercially-oriented. It is essential to raise a discussion about appropriateness of decongestants for small children in Latvia. Doctors and pharmacists, being extensively used information sources, must educate patients by explaining possible side-effects of decongestants, offering treatment alternatives, as well as other trustworthy information sources for dealing with rhinitis in cases of small children. Involvement of nurses in consultation about common cold diseases can facilitate work of the doctors.

Key words: **nasaldecongestants, rhinitis, OTC medicines, common cold, children, information sources**

Introduction

Symptoms of rhinitis, a common cold disease, caused by viruses, are frequently handled with over-the-counter (OTC) medicines, including nasal decongestants. Safety and efficiency of a number of common cold medicines, including nasal decongestants, are doubted in respect to small children(Rimsza and Newberry 2008, KinyonMunch 2011, Shefrin and Goldman 2009), andit is suggested toabstain from these medicinesin cases of children's rhinitis(the suggested age limit up to which these medicines should not be used differs depending on the country, though most commonly implied is age limit of six years)(American Academy of Pediatrics 2008, Health Canada 2008, The Medicines and Healthcare products Regulatory Agency 2009).

In Latvia nasal decongestants can mostly be obtained in pharmacies without prescription, and most of the PILs (patient information leaflets) permit use of them for children. The quantitative

study in 2010 “Use of medicines in cases of common cold in Latvia”(Salmane- Kulikovska, Mezinska and Rungule 2010) demonstrated excessive use of nasal decongestants for small children - 52.2% of the respondents, who used medicines to treat or relieve common cold symptoms for children (age 0-6), had used decongestants. These results marked out the necessity of more profound qualitative researchin order to clarify information sources and perceived information, as well as the evaluation of the information sources suggesting use of nasal decongestants for children under six.

Research methods and sample

A study enclosing 27 semi-structured interviews with caregivers was performed. The significance of individual experience of respondents and the need to select explanatory-informative cases provided for the qualitative type of study, based on purposive sampling, using snow-ball sampling method. The main sampling parameter was “having used nasal decongestants for a child (children), age 0-6, for relieving symptoms of rhinitis”. This type of study is usually applied, when it is important to acquire cases for in-depth investigation, but not a representative sample (Neuman 2003, 213).

Interviews were semi-structured and problem-centered (Flick 1998, 88), with the average length of 20-30 minutes. Interviews were recorded, and each respondent completed and signed an informed consent form prior to the interview.

All of the respondents were females, and almost all- mothers (one respondent was a caregiver of a grandchild). Such sample characteristics is determined by the fact that sick children are mostly taken care of by females in Latvia.

The sample was composed of 22 Latvians, four Russians and one respondent of another nationality, 17 respondents were from Riga and 10 respondents from the surroundings (Riga district, Jurmala). The age of respondents was 25-57 years. Twenty-one respondents had higher education, the rest of the respondents- secondary education. The total number of children (0-6 years) being referred to within the limits of this study was 30.

Analysis, entailing manual coding of transcripts, was performed with the program Nvivo 9.0, and was based on thematic coding procedure, providing for grouping data into categories, corresponding to the “coding paradigm”, emerging from the aim, tasks and the content of the study (Flick 1998, 189-190).Transcripts were checked for the presence or absence of categories.

Results

The interviewed caregivers explained how they had obtained information about nasal decongestants for dealing with children's rhinitis, the content of the information they had perceived from these sources, as well as presented evaluation of these sources.

Although rhinitis was perceived as a mild, self-limiting common cold disease, the decision to use decongestants for childrenis very oftenbased upon a suggestion of a doctor - General practitioner (GP), pediatrician, otorhinolaryngologist. It was in several cases stated that decongestants were suggested by a doctor previously, and because of the perceived efficiency, were continued to be used repeatedly. The suggestions perceived from the doctor did not include information about potential side-effects of decongestants. It wasin some cases stated that the doctor had suggested avoiding use of decongestants for more than four to seven days.Respondents perceived the tendency of doctors to favor a particular brand of decongestants, andthat was basedon arguments, like "*the doctor said thisis the best*", "*the most harmless*","*very mild"*. The information, perceived from doctors, contained also delusionabout homeopathic potencies of the decongestants.The opinion regarding cooperation with the doctor was distinctive. It was by a part of respondents evaluated as positive, stating that doctors usually carefully examine problems, are accessible and havea non-commercially oriented opinion: "*I can also telephone her and ask for an advice*.",or "(..) *I have to assume that she is objective. I trust that she is not like…, she has no commercial interests."*Opposite accounts included doctors' lack of time and failure to explain issues related to medicines. A doubt about possible commercial interests of a doctor was expressed: *"She has no time, she only sits there…","Oh, no, (..) I cannot say that doctors explain, why these medicines, - no*!",or "*Of course, it is not a secret that doctors have to suggest certain medicines, and they are being reimbursed for that- for the promotion of these medicines*".

Just one respondenthad consulted a medical nurse regarding medicines provided for dealing with rhinitis of a child.

The decision to use nasal decongestants was also based upon the suggestion of a pharmacist. There were different opinions –advice of a pharmacistwas evaluated positively by a part of the respondents, mentioning that pharmacists listen in theproblem and offer, for instance, cheaper alternatives (generic medicines) instead of original medicines. Respondents pointed to the importance of personal relationship and attitude from the pharmacist:"*I rely on her. If she is not in the pharmacy, I try not to purchase medicines (..) She is like a member of our family."*There was however a certain suspect about possible commercial interests of pharmacists:"*I hear only this*

brand (..) *also in pharmacies. I think there are good sales representatives, who have convinced everybody that this decongestant is the best, and so*."

Lay people (friends, relatives, other caregivers) turned out to be an important information source, not only suggesting medicines, but also the doctor, who had been admitted to be professional, and whose advice had helped. Opinions are exchanged by communicating directly and through internet forums. Discussions with other caregivers, having children with similar health problems, are of high importance. They are characterized by respondents as*"trustful"*, *"not commercially oriented"* and *"unbiased"*.

The data also show that respondents pay more attention to ailment of children than to their own health problems examining medicines information more carefully in cases of children's illnesses:"(..) *I do not make experiments* [with my child] (..) *I sometimes take the liberty of experimenting with myself, but with a child- no!*"

Patient information leaflets (PILs) are usually considered important and worth to be paid attention to, especially dealing with ailment of a child:*"Concerning medicines for a child- I read everything from A to Z.*" However there is a tendency to read PILs when using the medicine for the first time and do not re-read themin cases of repeated use. Generally respondents trust the information provided by PILs, considering it to be objective, understandable and helping: *"Every source has its own opinion, and the information differs, I do not know what or whom I should trust. I trust only the medicines' instruction, or whatever it is called.*" There were however claims that the information provided by PILs is too broad and should be more concise.

The respondents recognizedthe plenitude of information on the internet, but it turned out that this source is not always used when dealing with children's rhinitis. The reasons for notusing this information source were very often based on the opinion that this information source is not trustworthy enough, particularly dealing with ailment of children. There was an opinion that within the huge amount of information it is difficult to find answers on particular questions:*"It is not enough to read one source. Instead of reading one, it is necessary to read twenty more.*" The most frequently mentioned were portals www.calis.lv, which is frequently double-checked against other opinions. Other mentioned sources include www.saaukstesanas.lv, www.maminuklubs.lv, www.zales.lv, www.arsts.lv, the State Agency of Medicines home page. Respondents also look for information by typing particular key-words in www.google.com.

The consulted periodicals include „Mans Mazais", „Ieva", „Veseliba", „Doctus", being evaluated quite inconsistently- there were opinions that these sources are trustful, if compared to the internet, as well as those characterizing this information as *"superficial", "non-professional"*,

"outdated", ""with no deeper analysis" and also revealing certain commercial interests.TV and radiowere mostly associated with medicines advertising information.Respondents generally suggested that their decision to buy medicines cannot be influenced by medicines advertisements.

Skeptic opinion about availability of unbiased (non-commercial) information about medicines was dominant :"(..) *I think availability of independent information is limited. Let's say, available is what producers want to be available* (..)".The overall quality of the available information was evaluated distinctively- there were opinions that the available information is too complicated, as well as those stating that it is too primitive.

Discussion

Despite of the perception of rhinitis to be a minor ailment- a non-heavy, self-limiting disease, parents needdoctor's advice in cases of children. The perceived need to consult a doctor about minor ailments is found to be influenced by different factors, including doubt regarding patient's own knowledge, need for reassurance, and does not always depend on the severity of symptoms (Cantrill, Morris and Weiss 2006, 160-162).

It has frequently beenexamined, whether use of OTC medicines has to be discussed with a doctor. There is an opinion that doctors should not ask their patients about OTC medicines use, as it may be perceived as "physician trying to "take over" and medicalize an area that has typically been in the patient's control" (Sleath, et al. 2001, 358). Others argue that advice of doctor is essential in order to avoid possible adverse-effects of different medicines, especially when ailments of children are concerned (Ryan, Brewer and Small 2008, 180). Additional reasons for asking patients about OTC medicines use are "they [physicians] can gain a better understanding of everything their patients are doing to improve or maintain their health" (Sleath, et al. 2001, 358).

How should the optimal scenario look like? Keywords, suggested by the researchers are "collaborative care" (Bradley and Blenkinsopp 1996, 835). Doctors should acknowledge and support a worldwide self-medication tendency (Coulter 2005, 1200-1201, Bradley and Blenkinsopp 1996, 837) by maintaining the role of a good information source. Another keyword is "patient-centered approach"- rising information level of a patient on the basis of the existing knowledge of the patient (Weel-Baumgarten 2008, i68). To be good collaboration partners, doctors should be more proactive in providing information about healthcare issues to patients, "especially for those who are less motivated to seek written medicines information" (Koo, Krass and Aslani 2006, 184), to suggest trustworthy information sources, being "the main gate-keepers" (Busfield 2010, 934).The patient-centered approach has long term benefits. In short term it seems to be additional

workload for the doctors, but the improved knowledge level will result in better health level of the population (Stewart, et al. 2000, 796).

Nurses in Latvia have not gained a status of a widely used information source about medicines, also in cases of common cold. The studies (Keleher, et al. 2009, Lenz 2004), examining the role of primary nursing, testify that involvement of nurses in patient-centered health care can grant positive outcomes for patients' health similar to the outcomes provided by doctors. Best results in patient health care however can be achieved by a successful cooperation and exchange of information among doctors, pharmacists and nurses (Bradley and Blenkinsopp 1996, 837).

Pharmacist is a recognized information source (Hughes, Whittlesea and Luscombe 2002, 245). Other previous studies in Latvia point out that every fourth or third peron, who purchases medicines, asks for pharmacist's advice (Ozolina 2006, 23). There are implications that pharmacists should be more proactive in asking questions about medicines the purchaser already uses and expaining medicines-related information to ensure medicines are used rationally (Ramstrom, et al. 2006, 248).

Importance of lay people as an information source is testified both by empirical studies (Hughes, Whittlesea and Luscombe 2002, 247, Salmane-Kulikovska, Mezinska and Rungule 2010), as well as by the theory of illness behavior (Gabe, Bury and Elston 2004, 67).

Medicines users generally trust PILs, however the evidence suggests that PILs are generally not re-read before the repeated ailments (Hughes, Whittlesea and Luscombe 2002, 245). The quantitative study in Latvia in 2010 suggested that respondents consider themselves to be complied with written medicines information provided by PILs (Salmane-Kulikovska, Mezinska and Rungule 2010). Another study in Latvia suggested that 61.0% of the medicines users read PILs at least once, meanwhile considering the enclosed information to be too complicated and hard to be understood (Ozolina 2010).

Internet can be a useful information source, particularly in case of minor ailments, like rhinitis, though due to plenitude of information, not all the advices found on the internet are trustworthy (Risk and Petersen 2002), therefore it is the task of medical professionals to peer-review the content of information sources and to suggest the trustful ones for medicines users (Pandolfini, Impicciatore and Bonati 2000, 1).

Conclusions

1. Doctors, being an important sourceof information in cases of children's rhinitis, should use the opportunity to raise the level of knowledge of medicines' users byexplaining

issuesrelated to common cold medicines, including nasal decongestants for children (inefficiency and inappropriateness of these medicines for children, possible side-effects, compatibility of nasal decongestants with other medicines, etc.). Doctors should also dispel erroneous perceptions regarding decongestants (perceived homeopathic properties of some decongestants, etc.) and also offer alternative means of relieving common cold symptoms, including those of rhinitis for children.

2. Doctors should support self-medication tendency with OTC medicines by counseling trustworthy and good-quality sources of information that can be used in self-medicating minor ailments like common cold.As there is a suspicion about certain commercial interests having impact on the available information, it is essential to ensure a source of non-commercial and unbiased information for medicines' users.
3. Involvement of nurses in patientconsultations regarding common cold diseases and medicines would facilitate the workload of doctors and help raise the knowledge level of medicines' users.
4. PILs of most frequently used nasal decongestants provide for use of these medicines for small children. Information in PILs has to be revised and amended according to the practice and experience obtained by other countries, like UK, USA, Canada, etc., indicating that use of nasal decongestants is not suggested for small children. "Safety is not simply an intrinsic feature of the drug - it can arguably be achieved by providing better information to the patient" (Bradley and Blenkinsopp 1996, 835).
5. Pharmacists should be more proactiveand ask purchasers of common cold medicines about symptoms of illness, age of a person, experiencing common cold symptoms, about other medicines used, etc., in order to ensure rational use of common cold medicines and to diminish the tendency to use common cold medicines, like nasal decongestants, in dealing with rhinitis of children.

References

1. American Academy of Pediatrics, USA. "American Academy of Pediatrics Urges Caution in Use of Over-the-counter Cough and Cold Medicines." *American Academy of Pediatrics Web site*. January 17, 2008. http://www.aap.org/advocacy/releases/jan08coughandcold.htm (accessed March 15, 2011).
2. Bradley, Colin, and Alison Blenkinsopp. "The Future for Self Medication." *BMJ (Clinical Research Ed.)* 312, no. 7034 (1996): 835-837.
3. Busfield, Joan. "'A Pill for Every Ill': Explaining the Expansion in Medicine Use." *Social Science & Medicine* 70 (2010): 934-941.
4. Cantrill, Judy, Caroline Morris, and Marjorie Weiss. "How Patients Perceive Minor Illness and Factors Influencing Seeing a Doctor." *Primary Health Care Research & Development* (Sage Publications) 7, no. 2 (2006): 157-164.

5. Coulter, Angela. "What do Patients and the Public Want from Primary Care?" *British Medical Journal* 331, no. 7526 (2005): 1199-1207.
6. Flick, Uwe. *An Introduction to Qualitative Research.* London, Thousand Oaks, New Delhi: SAGE Publications, 1998.
7. Gabe, Jonathan, Mike Bury, and Mary Ann Elston. *Key Concepts in Medical Sociology.* London: SAGE publications, 2004.
8. Health Canada, Canada. *Health Canada*. 2008. http://www.hc-sc.gc.ca/ahc-asc/media/advisories-avis/_2008/2008_184-eng.php (accessed February 15, 2011).
9. Hughes, L., C. Whittlesea, and D. Luscombe. "Patients' Knowledge and Perceptions of the Side-effects of OTC Medication." *Journal of Clinical Pharmacy & Therapeutics* 27, no. 4 (2002): 243-248.
10. Keleher, H., R. Parker, O. Abdulwadud, and K. Francis. "Systematic Review of the Effectiveness of Primary Care Nursing." *International Journal of Nursing Practice* 15, no. 1 (2009): 16-24.
11. KinyonMunch, Kathryn. "What do You Tell Parents when their Child is Sick with the Common Cold?" *Journal for Specialists in Pediatric Nursing* (Wiley Periodicals) 16 (2011): 8-15.
12. Koo, Michelle, Ines Krass, and Parisa Aslani. "Enhancing Patient Education about Medicines: Factors Influencing Reading and Seeking of Written Medicine Information." *Health Expectations* 9, no. 2 (2006): 174-187.
13. Lenz, E.R., M. O. Mundinger, R.L. Kane, et al. "Primary Care Outcomes in Patients Treated by Nurse Practitioners or Physicians: Two-Year Follow-Up." *Medical Care Research and Review* 61, no. 3 (2004): 332-351.
14. Neuman, Lawrence W. *Social research Methods: Qualitative and Quantitative Approaches.* 5th edition. Boston, USA: Allyn and Bacon, 2003.
15. Ozolina, Vita. *Analysis of Self-medication and Pharmacological Care. Tendencies, Gains and Risks.* A summary of DrPharm Thesis, Riga: Riga Stradins University, 2006.
16. —. "Study of Accessibility and Quality of Patient Information about Medicines in Latvia." *3rd International interdisciplinary scientific conference "Society, health, welfare", collection of abstracts.* Riga: Riga Stradins University, 2010. 103.
17. Pandolfini, C., P. Impicciatore, and M. Bonati. "Parents on the Web: Risks for Quality Management of Cough in Children." *Pediatrics.* 2000. http://www.pediatrics.org/cgi/content/full/105/1/e1 (accessed July 22, 2010).
18. Ramstrom, Helena, Shanaz Afandi, Katarina Elofsson, and Sune Petersson. "Differences in Beliefs between Patients and Pharmaceutical Specialists Regarding Medications." *Patient Education and Counseling* 62, no. 2 (2006): 244–249.
19. Rimsza, Mary E, and Susan Newberry. "Unexpected Infant Deaths Associated With Use of Cough and Cold Medications." *Pediatrics e318-e322* 122, no. 2 (2008): e318-e322.
20. Risk, Ahmad, and Carolyn Petersen. "Health Information on the Internet: Quality Issues and International Initiatives." *JAMA* 287, no. 20 (2002): 2713-2715.
21. Ryan, Teresa, Melanie Brewer, and Leigh Small. "Over-the-counter Cough and Cold Medication use in Young Children." *Pediatric Nursing* 34, no. 2 (2008): 174.
22. Salmane-Kulikovska, Ieva, Signe Mezinska, and Ritma Rungule. Latvijas iedzīvotāju medikamentu lietošanas paradumi saaukstēšanās saslimšanu gadījumos (Use of medicines in cases of common cold). research report, Riga: Health projects for Latvia, 2010, 1-16.
23. Shefrin, Allan E, and Ran D Goldman. "Use of Over-the-counter Cough and Cold Medications in Children." *Canadian Family Physician* 55 (2009): 1081-1083.
24. Sleath, Betsy, Richard H Rubin, William Campbell, and Lisa Gwyther. "Physician–Patient Communication about Over-the-counter Medications." *Social Science & Medicine*, no. 53 (2001): 357-369.
25. Stewart, Moira, et al. "The Impact of Patient-Centered Care on Outcomes." *The Journal of Family Practice* 49, no. 9 (2000): 796-804.
26. The Medicines and Healthcare products Regulatory Agency, MHRA. "The Medicines and Healthcare products Regulatory Agency." *Over-the-counter cough and cold medicines for children.* February 28, 2009. http://www.mhra.gov.uk/Safetyinformation/Safetywarningsalertsandrecalls/Safetywarningsandmessagesformedicines/CON038908 (accessed May 18, 2011).
27. Weel-Baumgarten, van, E. "Patient-centred Information and Interventions: Tools for Lifestyle change? Consequences for Medical Education." *Family Practice* 25 (2008): i67-i70

SOCIAL INTELLIGENCE INDICATORS FOR ADDICTION DISORDER PATIENTS

SOCIĀLĀ INTELEKTA RĀDĪTĀJI NARKOLOĢISKIEM PACIENTIEM

Velga Sudraba, MD
Riga Stradiņš University, Doctoral study program „Medicine", Riga Centre of Psychiatry and Addiction Disorders, Tvaika 2, Riga, LV-1005, Latvia
e-mail: velgasudraba@gmail.com; phone: +37129115522
Kristīne Mārtinsone, Dr.psych. Mg.sc.sal.
Riga Stradiņš University, Faculty of Rehabilitation, Assist. Professor, Professional Master's study programme in health care „Arts therapies", head
Dzirciema 16, Riga, LV-1007, Latvia
e-mail: kristine.martinsone@rsu.lv; phone: +37129256229

Abstract. Alcohol and drug addiction is a bio-psycho-social illness that affects a person not only physically but also influences his psyche, thinking and behavior as well as his attitude towards himself and his closest friends and others. In this paper, particular attention is paid to the three components of addiction disorder patients' social intelligence (SI): social information processing (SIP), social skills (SS) and social awareness (SA). Using the Social Intelligence Test, 241 respondents were questioned; all Riga Center of Psychiatry and Addiction Disorder department patients. The mean arithmetical indicators were statistically relevant and significantly higher for males than females (in SIP factor); drug addict indicators were higher than those of alcoholics in all three SI factors. Male drug addict indicators were statistically relevant and significantly higher in the SIP and SA factors when compared to those of male alcoholics. For female drug addicts and alcoholics the SI factors had no significant statistical difference. In this paper, the research results were analyzed. The results allude to the respondents' difficulties in adequately and critically assessing their own aptitudes of social intelligence as well as their various ways of responding that are deemed socially acceptable.
Key-words: social intelligence, social skills, social information processing, social awareness, alcoholics, drug addicts, substance use disorders, gender.

Introduction

The leading health indicators of Latvian inhabitants are somewhat lower in general, when compared to the rest of the EU countries' health indicators. For example, the expected life span of Latvian inhabitants is one of the lowest in the EU: the average life expectancy of a female in the EU is 82.2 years while in Latvia it stands at 77.8 years; an EU male has an average life expectancy of 76.1 years while in Latvia it stands at only 67.0 years (Eurostat, 2010). This difference can be accounted for by an unhealthy and risky lifestyle involved with the prevalence of the various types and causes of death in Latvia. For instance, the death rates associated with heart ischemic illnesses, lung cancer, alcohol use as well as suicides and traffic accidents. (Cayotte, Buchow, 2009).

Substance addiction is still a very serious problem in Latvia. The spread of unhealthy habits among Latvian residents no only puts greater strain on the healthcare system (whose specialists

must try to avert the consequences of harmful lifestyle on health) but also creates inestimable losses in society through lost productivity and human-capital (resources). (Koroļeva, 2008).

According to the Health & Economy Center (HEC) Register data,[14] at the end of 2009, on the alcohol addiction (F10.2-9) diagnosis register there were 30,103 people (1,335/ 100,000), including 6,289 women or 21% of the total and twelve children and adolescents. In 2009, The HEC in-patient bed fund database attested that in-patient clinics with addiction disorder profile beds treated 7,384 patients in total with an alcohol addiction diagnosis; of this group 1,399 were women or 19% (VEC, 2010). During 2009, according to the HEC data analyzed by its specialists, 67 (60 men and 7 women) from the current HEC register committed suicide, which was 13% of all suicides committed in Latvia that year. In this group, those registered with alcohol-related problems, their suicide prevalence was 8.8 times greater than those in the general population in Latvia. (Pulmanis, 2011). In fact, women with alcohol addiction are becoming ill with alcoholism at an even greater rate. Thirty years ago the ratio of alcoholic men to alcoholic women was 12 to 1. In the past few years however, there has been a tendency for this ratio to increase for women and now stands at 5 to 1. (Osis, 2006). In 2009, first-time registered patients stood at 1,769 patients in total; in this group, 420 were women and three were girls, which represents 23.9% of all first-time registered alcoholic patients; moreover, more than half of this female group (242 women) were women aged between 30 and 49. (VEC, 2010).

At the end of 2009, there were 3,468 people (154.2/100 000) (F11-19. 2-9) on the patient register with a drug abuse diagnosis. (VEC, 2010). By doing research analysis and calculations, which were based on many years of cohort research, HEC researcher Trapencieris has concluded that there could be between 19,706 to 24,130 problematic drug abusers[15] in Latvia; of this group between 9,853 and 12,065 live in Riga. (EMCDDA, VEC, 2010).

According to HEC research, every fifth respondent personally knows someone who has tried drugs. In the youngest respondent group (aged 15-24) 50% of males and 39.7% of females know someone who has tried drugs. (Pudule et al., 2010)

These are only a few statistics, which describe the seriousness of the situation; not mentioning poisonings, accidents, criminal activity, vehicle crashes that were done under the

[14] „With diagnosed diseases the Ill Patient Register of addiction disorder patients and individuals who use addiction-inducing substances"

[15] Those individuals, who used various therepeutic, legal, emergency care and social services, which were necessary to reduce the consequences of drug abuse.

influence of drugs or alcohol. In addition, the statistics of health problems and diseases (such as: heart disease, stomach and intestinal disease, psychiatric disease) caused by malignant and harmful use of psychotropic substances and drugs. Alcohol and drug addiction is a bio-psycho-social illness, which influences a person not only physically but also influences person's psyche, cognitive processes, behavior, his or her attitude to one-self, their closest family and friends and others. (Schuckit, 2007; Doweiko, 2009; Lesch, 2011). Therefore, psycho-active substances (PAS) for addict-patient care and therapy must be complex and focused on mitigating the possibility of disease relapse in order to improve the addict-patient quality of life; increase his or her self-esteem; and promote their re-integration into society. (Sudraba, 2009). Today, health problems need to be solved not only with limited traditional bio-medical methods but also using humanitarian and social science and their conclusions. Most of all, increasingly the patient himself must become more involved in their own treatment process. (Martinsone et al., 2008).

Due to the recent financial crisis several unfavorable tendencies have been observed in addiction disorder treatment and therapy: malignant psycho-active substance use has been increasing; at the same time, treatment, rehabilitation, and psycho-therapeutic programs have been reduced; planned patient counts have been decreasing; and patients have been coming for help too late. (HEC, 2010) The required bed count, short-term psycho-therapeutic program coverage, and overall access in Latvia are woefully inadequate; moreover, the addict disorder patient care provided does not conform to the bio-psycho-social development and resulting consequence model of addiction disease. At present, the main tendency in Latvia is to reduce the physical symptoms and problems instead of treating the equally as important part of the disease – to reduce the psychological and social symptoms; as well as improve the patient's psycho-social level of functionality.

Taking into account the aforementioned facts – the increased spread of substance addiction in Latvia, the disease bio-psychosocial etiology and its consequences, treatment methods focused exclusively on the biological part of the disease, and lastly, clinical experience - all provided impetus to commence a pilot-project to take an in-depth look at the addict disorder patient's Social Intelligence (SI), its components and how the results could be used to improve addiction disorder patient treatment and recuperation. This improvement in treatment and recuperation is achieved by not only reducing the physical suffering in a detoxification course but also teaching the patient to understand their illness as well as to control its manifestations and behavioral reactions. In this way, it is possible to improve the quality of life for the patients by returning to society work-able individuals and help families take responsibility and care for productive family members.

Social Intelligence is defined as a personality's capacity, which is based on cognitive processes, emotional and social experience, understanding one-self and others and predicting his or her behavior. Social Intelligence describes and establishes a personality's skill: to successfully navigate through different social situations; to correctly define personal and external experiences; and allows taking adequate action in these situations. It should be emphasized that an individual's social intelligence cannot be assessed abstractly, rather it should be assessed taken together with different areas of interest and contexts in which it is expressed and the tasks in life that it serves. (Kihlstrom, Cantor**,** 2000). These tasks depend on the requirements, structures and limitations of the individual`s social environment (Silvera et al., 2001). In order to research social intelligence the Norwegian scholars David H. Silvera, Monika Martinussen un Tove Dahl (Silvera, Martinussen, Dahl, 2001) have created the Tromso Social Intelligence Scale (*Tromso Social Intelligence Scale, TSIS*), which contains three components (Social awareness, Social information processing, Social skills).

Social Awareness describes the ability to listen to others, understand fully what was not said or partially expressed thoughts and feelings; the ability of the individual to be part of a group or a team; the ability to take decisions; to recognize culture and value aspects and how these aspects influence an individual`s actions and behavior; a desire to help others in order to satisfy his or her needs as well as to comprehend other people's needs before they are defined. (Silvera et al., 2001; Friborg et al., 2005; Gini, 2006).

Social Information Processing describes social interaction within current cognitive processes: the awareness and acceptance of social situations, the defining and setting of targets, the searching of feedback or social solutions, the taking of optimal decisions, the implementation of chosen action, while at the same time observing its effectiveness. (Silvera et al., 2001; Friborg et al., 2005; Gini, 2006).

Social Skills encompass responsibility, self-control, persistence, and cooperation. A high social intelligence has to do with interest of social issues with a necessity to work with others and often is involved with developed organizational skills. People with a developed social intelligence usually have a desire to explore one-self and to develop reflexive abilities. These people are able to find suitable means of communication with various people from all walks of life in various situations. These individuals possess a repertoire of many character roles and have a tendency to neuroplasticity in character role playing (Silvera et al., 2001; Friborg et al., 2005; Gini, 2006).

Social skills are first obtained from the family. From a psycho-dynamic viewpoint, Ego organization dysfunction, which is promoted by low levels of education, inconsistent upbringing in

the family, violence experienced in family and elsewhere, and a general lack of social knowledge (Meade, Slesnick, 2002, Latvala et al., 2011; Lesch et al.,2011), creates dysfunction of perception, which in turn leads to emotional loss and the loss of differentiating emotional meaning, and dysfunction in object relationships. This dysfunction is often involved in primitive psyche defense mechanisms, difficulties with frustration and toleration, affect and impulse control dysfunction, and in difficulties in taking decisions. Alcohol and drug abuse becomes a way to strengthen a weakened Ego (Lesch et al., 2011).

Moreover, the level of education reduces the meaning of genetic and environmental influence in relation to alcohol problems and possibly, reflects the differences in the social control mechanisms, which are related to the level of education. A drug addict individual's priority is a primitive, simplified need to achieve a level of satisfaction, which is further enhanced by a low level of education. The research attests to the fact that heroine users had a low level of education in 80% of their cases, which is far lower than the in the general population (2005-25, 5%) (Lee, Pang, 2008).

As pointed out by Ham and Garcia (2010) social intelligence skills are directly related to alcohol and drug usage. In fact, the lower the skills, the higher the risk the addict will use drugs and vice versa; substance abuse creates disorders for social intelligence skills. Similar observations were made by American researchers Scheier, Botvin, Diaz, and Griffin. Males were at greater risk for poor refusal skills and reported higher alcohol involvement. Youth characterized by poor social skill development reported lower refusal efficacy, lower grades, poor competence, and more alcohol use. Poor refusal efficacy was associated with more risk-taking, lower grades, less competence, and more alcohol use. High personal competence was associated with lower alcohol use in both the eighth and tenth grades, but had no long-term effects on alcohol use (Scheier, Botvin, Diaz, Griffin, 1999).

Alcoholism occurs differently in men than in women. For men between the ages of 17-20 alcoholism can go hidden for years and surface only at the age of 30. For women on the other hand, the beginning of alcoholism is typically later. Spontaneous remission for men is possible between the ages of around 50-60 while for women these kind of remissions are extremely rare. (Каплан, Сэдок, 1998*;* Osis, 2006). Somatic disorders appear for women only after five years of harmful usage while for men somatic disorders tend not to be appear for twelve years or even longer (Lesch et al., 2011). Alcohol abstinence syndrome for women is full of emotions, mainly, bouts of depression and depression-dysphoric disorders. (Osis, 2006). Addict women are usually left by

their husbands while the wives of addict men tend to stay even if there is verbal and physical aggression. (Lesch et al., 2011).

Research on alcohol use and problems has demonstrated a much higher rate of alcohol use disorders among men compared with women. The research reviews the most frequently researched biological and psychosocial factors that may play a role in the gender differences in alcohol use and problems. Among the biological factors, women might carry a lower genetic risk for alcohol use disorders and tend to suffer more negative biological consequences from drinking as compared with men. Regarding psychosocial factors, men appear to be more likely than women to manifest certain risk factors for alcohol use and problems (e.g., fewer perceived social sanctions for drinking, positive expectancies for alcohol use, personality traits such as impulsiveness) and have fewer protective factors. (Nolen-Hoeksema, Hilt, 2006).

When analyzing the gender differences between addicts, differences can be observed in social intelligence skills and competency. It was observed in research of schoolchildren and their addiction substance abuse that higher levels of social skills were associated with boys' smoking and girls' alcohol consumption; a lower level of social information processing was associated with boys' smoking; a lower level of social awareness was associated with boys' alcohol consumption (Orosova, Gajdošova, 2009).

Gender moderates (Walitzer, Dearing, 2006; Schneider et al., 1995) the association between marriage and alcoholism relapse. For women, marriage and marital stress were risk factors for alcohol relapse; among men, marriage lowered relapse risk. Alcoholic women are more likely to be married to heavy drinking partners than are alcoholic men; thus, alcoholic women may be put at risk of relapse by marriage and alcoholic men may be protected by marriage. Women relapsing to substance use appear to be more sensitive to negative affect and interpersonal problems. Men, in contrast, may be more likely to have positive experiences prior to relapse. Several studies have confirmed (Foran, O'Leary, 2008) that men become violent more often than women do. Chronic substance use was associated with higher levels of different factors of trait aggression in females than in males. Data suggest that aggression of substance dependent females is more easily provoked by chronic use of alcohol and drugs than males. (Bácskai et al., 2011).

In studies of alcoholism and drug addiction it can be found that the significant main effect of alcoholism was associated primarily with negative emotionality, whereas the significant drug use disorder main effect was associated primarily with constraint. (McGue et al., 1999)

Therefore, it can be concluded that there were differences in social intelligence competency involved with both the type of addiction and gender. In following, this research target is to clarify

which are the social intelligence indicators (social information processing, social skills, social awareness) for addict disorder patients; are there differences in gender and addiction differences in the SI indicators; and how the results could be made to improve the recuperation of addict disorder patients. This is why four research questions were put forth:

1) Are there differences in the SI indicators between addict women and addict men?
2) Are there differences in the SI indicators between alcoholics and drug addicts?
3) Are there differences in the SI indicators between alcoholic men and drug addict men?
4) Are there differences in the SI indicators between alcoholic women and drug addict women?

Research methods

***Research Instruments*:** The Tromso Social Intelligence Scale, TSIS (*Tromso Social Intelligence Scale, TSIS*), and its authors: David H. Silvera, Monika Martinussen and Tove Dahl (Silvera, Martinussen, Dahl, 2001) was adapted in Latvia, by Ilona Krone (Kuzņecova) and Ieva Šlosberga in 2006. (Kuzņecova, Šlosberga, 2006).

The Social Intelligence Scale contains 21 assertions. There are seven assertions in each Social Intelligence component (social information processing, social skills and social awareness). The research subjects must assess themselves by giving an assessment from one to seven; one meaning''completely unsuitable'' and seven meaning ''completely suitable.'' The points are then tallied making sure to re-code the questions with a negative meaning beforehand. In Latvia, for the scale of the adapted version's acquired Cronbach's alpha indicators were as follows: Social Information processing 0.60; Social Skills scale 0.67; Social Awareness Scale 0.60 (Kuzņecova, Šlosberga, 2006).

Research Members: „Riga Centre of Psychiatry and Addiction Disorders" patients came from two departments: Detoxification and the Minnesota Program (n=241). 154 (63.9%) men and 87 (36.1%) women aged from 18 to 66, average age was 36.4. Of these patients 185 were alcoholics (76.8%) and 56 were drug addicts (23.2%).

Inclusion criteria: the patient was given an addiction diagnosis (F10.2-F19.2) according to ICD-10; the patients are at least 18 years of age; were found in the in-patient clinic departments: Detoxification department for alcoholics following a five day course therapy to reduce acute symptoms and for drug addicts following a 10 day course therapy to reduce acute symptoms; and for patients in the Minnesota program, which ensured these patients had a similar condition using PAS (MP requirement was at least five days without PAS usage); were not in an acute condition; understood Latvian; and agreed to provide informed consent and filled out the forms completely.

Exclusion criteria: Patients that have come only to the Motivational course (7-12 days long); patients who either refused to fill out or filled-out the forms incompletely.

In the Minnesota Program department from 1.01.2010 to 31.12.2010 of the 167 patients who matched the inclusion criteria 105 patients (62,9%) filled out the forms. In the Detoxification department from 1.06.2010 to 1.10.2010 of the 618 patients who were receiving treatment and matched the inclusion criteria 136 patients (22%) filled out the forms. Most of the other patients or 78% consisted of patients who refused to fill out the forms basing their refusal on disinclination to do so or doing so would give no benefit to themselves or filled out the forms incompletely.

This research was approved of by the RSU Ethical Committee.

The data processing was done using SPSS 16th version and Excel programs. Descriptive statistical methods and conclusive statics were used in the data analysis (Student's t-test).

Results and discussion

In order to address the first question of this research to see if statistical relevant differences exist between genders in the SI indicators, descriptive statistical indicators were calculated for each group and the differences were verified in the three SI components by using the t-test.

Table 1. SI statistical indicator (mean arithmetical, standard deviation and p-value) comparison for addicted men and women.

	Male (n=154)		Female (n=87)		p-value
	Mean	SD	Mean	SD	
Social information processing (SIP)	**4,38**	**0,901**	**4,14**	**0,940**	**0,044**
Social skills (SS)	4,27	0,866	4,15	0,957	0,296
Social awareness (SA)	4,25	0,866	4,04	1,023	0,085

When comparing SI component mean indicators (see Table 1) it can be seen that *social information processing* component (SIP) indicators were statistically significant and higher in men (M=4,38; SD=0,901; p=0,044). The other two components did not have statistically significant differences (p>0,05), even though there was a tendency for men to show higher values in mean indicators on the whole.

In order to address the next question in this research whether statistically significant differences exist in the SI indicators or not, alcoholic and drug addict respondents were compared. Mean indicator comparisons were done by calculating the t-criteria.

Table 2. SI statistical indicators (mean arithmetical, standard deviation and p-value) comparing alcoholics to drug addicts.

	Alcoholics (n=189)		Drug addicts (n=52)		p-value
	Mean	SD	Mean	SD	
Social information processing (SIP)	**4,21**	**0,883**	**4,68**	**1,022**	**0,002**
Social skills (SS)	**4,16**	**0,873**	**4,48**	**0,953**	**0,027**
Social awareness (SA)	**4,10**	**0,904**	**4,50**	**1,004**	**0,007**

As shown in the research result summary, when alcoholics and drug addicts were compared the SI mean indicators (see Table 2), had statistically significant differences. In all three SI components the drug addicts had higher scores than the alcoholics: in the *SIP component* (M=4,68; SD=1,022; p=0,002), in the *social skills component (SS)* (M=4,48; SD=0,953; p=0,027) and in the *social awareness component (SA)* (M=4,50; SD=1,004; p=0,007).

In order to properly address the third research question as to whether or not statistically significant differences exist in the SI indicators for male alcoholics and male drug addicts, the mean indicators were compared.

Table 3. SI statistical indicator (mean arithmetic, standard deviation and p-value) comparison of male alcoholics to male drug addicts.

	Male alcoholics (n=124)		Male drug addicts (n=30)		p-value
	Mean	SD	Mean	SD	
Social information processing (SIP)	**4,31**	**0,871**	**4,78**	**0,904**	**0,009**
Social skills (SS)	4,22	0,834	4,51	0,899	0,094
Social awareness (SA)	**4,19**	**0,839**	**4,60**	**0,929**	**0,019**

When comparing male alcoholic to male drug addict SI mean indicators, it can be observed (see Table 3) statistically significant and higher indicators for men with drug addiction in both the *SIP component* (M=4,78; SD=0,904; p=0,009) and in the *SA component* (M=4,60; SD=0,929; p=0,019).

In order to answer the final research question whether or not statistically significant differences exist in the SI indicators for female alcoholics and female drug addicts, the mean indicators were compared.

Table 4. SI statistical indicator (mean arithmetic, standard deviation and p-value) comparing female alcoholics to female drug addicts.

	Female alcoholics (n=65)		Female drug addicts (n=22)		p-value
	Mean	SD	Mean	SD	
Social information processing (SIP)	4,03	0,886	4,52	1,201	0.059
Social skills (SS)	4,06	0,944	4,42	1,076	0.176
Social awareness (SA)	3,92	1,012	4,34	1,127	0.132

When comparing SI indicators for female alcoholics and drug addicts, it can be seen (see Table 4) that female drug addict and female alcoholic mean indicators have no significant statistical differences ($p>0.05$). Even so, the SIP component had a tendency to be higher for female drug addicts than for female alcoholics.

The research results acquired show that the respondents had high test score indicators. Therefore, they should have been individuals with a highly developed social intelligence. Nonetheless, the reality of the situation and other studies (Scheier, Botvin, Diaz, Griffin, 1999; Nolen-Hoeksema, Hilt, 2006; Orosova, Gajdošova, 2009; Ham, Garcia, 2010; Lesch et al.,2011) have shown the contrary; in fact, they revealed that their social intelligence was weakened. When interpreting the acquired results it must be taken into account that the respondents showed comparatively high results, which could point to a tendency of insufficient ability to critically assess their own social intelligence skills and competency. In fact, they demonstrate themselves in a socially acceptable light of not being able to differentiate reality from the desirable or imaginary.

The research data show that the SI component mean indicators for men are higher than for women. Moreover, in the SIP component the values showed a statistically significant difference. These results differ from results in other studies (Vasilova, Baumgartner, 2005; Baumgartner, Vasilova, 2005; Silvera, Martinussen, Dahl, 2001), where female SI indicators were higher than male SI indicators. In addition, in research done by the Slovak researchers Baumgartner and Vasilova both the SA and SS components had a statistically significant difference. This possibly means that individuals without substance use disorders diagnosis are able to assess their social intelligence skills more objectively and in a way that reflects reality.

As shown in the research results, when comparing alcoholic and drug addict mean indicators it can be observed that drug addicts have higher values than alcoholics do. Moreover, there were statistically significant differences in all three SI components. In addition, these indicators were higher when also compared to male alcoholic and drug addict SI indicators and female alcoholic and drug addict SI indicators.

These results were surprising. J. Mayer (Mayer, 2001) pointed out that those individuals who were better able to recognize and understand their own emotions as well as those of others in complicated social situations were also able to use this information in planning their activities and relied less on negative peer influence and kept open the possibility to adequately plan their actions in the social activity context at hand. Addict disorder patients especially drug addicts, demonstrated that they poorly understand the connection between actions and their consequences. Often, they engaged in aberrant activities including criminal activity resulting in dangerous situations because they lacked sufficient orientation in the generally accepted norms and rules of acceptable behavior. (Foran, O'Leary, 2008; McCutcheon et al., 2011) Drug addicts in the SIA component had the highest indicators, which was surprising because in Latvia it is illegal to use drugs, which carries with it criminal liability. Even so, the drug user acquiring illegal drugs and using them does not link this action to breaking social norms or violating the law. This in turn, can be interpreted that there exist structural and functional brain changes, the complex interplay between cognition, brain maturation, psychopathology and drug exposure, with drug neuro-toxic impact on the brain that lead to cognitive impairments in which memory dysfunction is prominent (Yücel et al., 2007; Robbins et al., 2008; Schoenbaum, Shaham, 2008), which manifests itself in cognitive and perception disorders that markedly disturb the drug addict from assessing a situation in a realistic way.

These deficits could be one of the causes why drug addicts and alcoholics perceive their reality around them as exaggeratedly idealized denying any possibility of deficiencies or as potentially malignant and threatening, which further exhibits their inability to properly assess the reality around them by swinging rapidly from one extreme to the other. If it is viewed from a psychodynamic perspective, it can be seen that for addiction disorder patients certain defense mechanisms of the psyche such as projection, projective identification, denial, ending relationships, which are characteristic of addict disorder patients. Often they misinterpret non-verbal signals relying instead on their inner conviction that they are the bad ones or conversely, that the world is a bad place. (McWilliams,1994; Kaplan et al., 2007; Francis et al., 1999; Ferrari et al., 2008; Lesch, 2011).

Taking into account the situation in Latvia, having to do with the spread of addiction disorder the influence of treatment methods mainly on the reduction of acute symptoms (excluding the disease's psychosocial part and the research established high social intelligence indicators especially for drug addicts) one must develop a critical attitude to one-self and their environment so essential in working with alcoholics and drug addicts. Special consideration should be given to

detoxification department patients who receive only a short treatment course to reduce only acute symptoms. It would be prudent to develop guidelines to motivate patients to continue treatment, teach the patients to understand their illness and its manifestations. In working with alcoholics and drug addicts it is important to focus on mitigating the positive effects (or highs) and to develop an adequate self assessment to reduce immature psyche defense mechanism influence thus, improving the patient's ability to admit their difficulties. A program must be drawn up that addresses not only in-patient care but also out-patient care in order to ultimately reduce relapse risk and improve the patient's quality of life.

In assessing the research results one would have to take into account the limitations and risks, which reduced the validity of the research; the research used only an available sample with no control group for comparison.

Conclusions

1. The SI indicators for drug addicts were statistically significant and higher in all components when compared to alcoholics.
2. The SI indicators for men were statistically significant and higher than those of women in the SIP component but did not have a statistically significant difference in the SA and SS components.
3. The male drug addicts had a statistically relevant and higher result than male alcoholics in the SIP and SA components while differing very little in the SS component.
4. Among women there were no statistically relevant differences in any of the SI components.
5. It can be observed that the SI indicators for drug addicts had a tendency to noticeably higher indicators. This in turn, leads one to believe that drug addict patients have significant difficulty to be critical of themselves, of current situations and their illness and of other people in their lives.
6. Continued research in this area is warranted. The research subject group could be widened, and results compared to the data of the control group; this in turn, could strengthen the validity of the overall research results. The respondent testing should be repeated three to six months following treatment.
7. In working with alcoholics and drug addicts it would be beneficial to ensure activities to promote critical attitude development to oneself and to his or her surrounding

environment. This in turn, should mitigate the use of immature psycho-defense mechanisms.

References

1. Bácskai E., Czobor P., Gerevich J. (2011). Gender differences in trait aggression in young adults with drug and alcohol dependence compared to the general population. *Progress in Neuro-Psychopharmacology and Biological Psychiatry*. 35(5), pp. 1333-1340
2. Baumgartner F., Vasilova K. (2005). K problematike merania sociálnej inteligencie. In: Sociální procesy a osobnost. Sborník příspěvků. Brno, pp 8-17 [28.06.11.] http://www.scribd.com/doc/43754898/Zbornik-Socialne-procesy-a-osobnos%C5%A5-2005
3. Cayotee E., Buchow H. (2009). Who dies of what in Europe before the age of 65. *Statistics in Focus*, Vol. 67. Eurostat. [20.04.11.]: http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-SF-09-067/EN/KS-SF-09-067-EN.PDF
4. Doweiko H.E.(2009). Concepts of Chemical Dependency. Belmont: Brooks/Cole, Cengage Learning, pp.17-36.
5. EMCDDA, VEC ziņojums (2010). Situācija narkomānijas problēmas jomā Latvijā 2009.gadā. Rīga: Reitox, 25.-32.; 64.-66.lpp.[In Latvian]
6. Eurostat News Release (2010). A statistical perspective on women and men in the EU27. [20.04.11.]: http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/1-05032010-AP/EN/1-05032010-AP-EN.PDF
7. Ferrari J., Groh D.R., Rulka G., Jason L.A., Davis M.I. (2008). Coming to Terms with Reality: Predictors to Self-deception within Substance Abuse Recovery. *Addictive Disorders & Their Treatment*, 7(4), pp.210-218.
8. Foran H.M., O'Leary K.D. (2008). Alcohol and intimate partner violence: A meta-analytic review. *Clinical Psychology Review*, 28(7), pp.1222-1234.
9. Francis DD, Caldji C, Champagne F, Plotsky PM, Meaney MJ. (1999) The role of corticotropin-releasing factor-norepinephrine systems in mediating the effects of early experience on the development of behavioral and endocrine responses to stress. *Biological Psychiatry*, 46(9), pp. 1153-1166.
10. Friborg O., Barlaug D., Martinussen M., Rosenvinge J.H., Hjemdal O. (2005). Resilience in relation to personality and intelligence. *International Journal of Methods in Psychiatric Research*. 14(10), pp.29-42.
11. Gini G. (2006). Brief report: Adaptation of the Italian Version of the Tromso Social Intelligence Scale to the adolescent population. *Journal of Adolescence*. 29, pp.307-312.
12. Ham L.S., Garcia T.A. (2010) Assessment of Social Skills in Substance Use Disorders . In Nangle D.V., Hansen D.J., Erdley C.A., Norton P.J. (eds). *Practitioner's Guide to Empirically Based Measures of Social Skills.* New York: Springer Science+Business Media. pp. 225-246.
13. Kaplan H.I., Sadock B.J., Sadock V.A. (2007). Synopsis of Psychiatry. Behavioral Sciences/ Clinical Psychiatry. 10th ed. Philadelphia: Lippincott Williams & Wilkins, pp.381-466.
14. Kihlstrom J. F., Cantor N. (2000): Social Intelligence. In: Sternberg, R.J. (ed.): *Handbook of Intelligence*, 2nd ed. Cambridge, U.K.: Cambridge University Press, pp. 359-379.
15. Koroļeva I., Mieriņa I., Goldmanis M., Trapencieris M. (2008). Atkarību izraisošo vielu lietošanas izplatība iedzīvotāju vidū: pētījuma rezultāti. Rīga: Socioloģisko pētījumu institūts. 12.lpp.[In Latvian]
16. Kuzņecova I., Šlosberga I. (2006). Tromso sociālā intelekta aptaujas adaptācija Latvijā. Nepublicēts maģistra darbs. Rīga .[In Latvian]
17. Latvala A., Dick D.M., Tuulio-Henriksson A., Suvisaari J., Viken R.J., Rose R.J., Kaprio J. (2011). Genetic correlation and gene-environment interaction between alcohol problems and educational level in young adulthood. *Journal of studies on alcohol and drugs*, 72(2), pp.210-220.
18. Lee S.S., Pang P.T.T. Integrated assesment of addictio epidemiology in Hong Kong. (2008). In: Thomas Y.F., Richardson D., Cheung I. (eds) *Geography and Drug Addiction*. Springer, pp.131-143.
19. Lesch O.M., Walter H., Wetschka Ch., Hesselbrock M., Hesselbrock V. (2011). Alcohol and Tobacco. Medical and Sociological Aspects of Use, Abuse and Addiction. SpringerWienNewYork, pp.15-35.
20. Mārtinsone K., Mihailova S., Mihailovs I.J., Majore-Dūšele I., Paipare M. (2008). Mākslu terapija un tās attīstības konteksti. Integratīvi-eklektiskā pieeja Latvijā. Rīga: RSU. 13.-18.lpp.
21. Mayer J. D. (2001). A Field Guide to Emotional Intelligence. In Ciarrochi J., Forgas J. P., Mayer J. D. (eds.) *Emotional intelligence and everday life*. New York: Psychology Press. pp.3-24
22. 22. McCutcheon V.V., Agraval A., Heath A.C., Edenberg H.J., Hesselbrock V.M., Schuckit M.A., Kramer J.R., Bucholz K.K. (2011). Functioning of Alcohol Use Disorder Criteria Among Men and Women with Arrests for Driving Under the Influence of Alcohol. Alcoholism: Clinical and Experimental Research. [25.06.11.] http://onlinelibrary.wiley.com/doi/10.1111/j.1530-0277.2011.01550.x/full
23. McGue M., Slutske W., Iacono W.G. (1999). Personality and substance use disorders: II.Alcoholism versus drug use disorders. *Journal of Consulting and Clinical Psychology*. 67(3), pp.394-404.

24. McWilliams N. (1994). Psychoanalytic Diagnosis. Understanding Personality Structure in the Clinical Process. New York: Guilford Press, pp.98-116.
25. Meade M., Slesnick N. (2002). Ethical considerations for research and treatment with runaway and homeless adolescents. *Journal of Psychology*, 136, 449-463.
26. Nolen-Hoeksema S., Hilt L. (2006). Possible Contributors to the Gender Differences in Alcohol Use and Problems. *The Journal of General Psychology*. 133(4), pp.357-374.
27. Orosova O., Gajdošova B. (2009). The association of social intelligence factors, normative expectations, and perceived accessibility with legal drug. *Adiktologie*, 9 (4): 204-211.
28. Osis G. (2006). Narkoloģija vispārējās prakses ārstiem. Rīga: TRIO-J, 23.lpp.
29. Pudule I., Villeruša A., Grīnberga D., Velika B., Tilgale N., Dzērve V., Rutks A., Prattala R. (2010). Latvijas iedzīvotāju veselību ietekmējošo paradumu pētījums, 2008. Rīga, 20.-26.pp.[In Latvian]
30. Pulmanis T. (2011). Pašnāvības un alkohols. VEC: Aktuāla informācija par atkarības problēmām. E-žurnāls 2/2011. [20.04.11.] http://vec.gov.lv/uploads/files/4d665b401ae86.pdf [In Latvian]
31. Robbins T.W., Ersche K.D., Everitt B.J. (2008). Drug Addiction and the Memory Sistems of the Brain. *Annals of the New York Academy of Sciences*, 1141, pp.1-21.
32. Scheier L.M., Botvin G.J., Diaz T., Griffin K.W. (1999). Social skills, competence, and drug refusal efficacy as predictors of adolescent alcohol use. *Journal of Drug Education*,29(3):251-278.
33. Schneider K.M., Kviz F.J., Isola M.L., Filstead W.J. (1995). Evaluating multiple outcomes and gender diferences in alcoholism treatment. *Addictive Behaviors*, 20(1), pp.1-21.
34. Schoenbaum G., Shaham Y. (2008). The Role of Orbitofrontal Cortex in Drug Addiction: A Review of Preclinical Studies. *Biological Psychiatry*, 63(3), pp.256-262.
35. Schuckit M.A. (2007). Drug and Alcohol Abuse. A Clinical Guide to Diagnosis and Treatment. New York: Springer Science+Business Media, pp.68-112; 304-320.
36. Silvera D.H., Martinussen M., Dahl T. (2001) The Tromso Social Intelligence Scale, a self-report measure of social intelligence. *Scandinavian Journal of Psychology*, 42, 313-319.
37. Sudraba V. (2009) Potentiality and Role of Art Art Therapy in Rehabilitatation of Alcohol, Drugs and Gambling Addicted Persons. *Contemporary Arts Therapies- Theory and Practice. Abstract Book.* Riga: RSU, pp.52-53.
38. Vasilova K., Baumgartner F. (2005). Why is Social Intelligence Difficult to Measure? [25.06.2010.] http://www.saske.sk/cas/archiv/4-2005/studia_vasilova-baumgartner.html
39. VEC (2010). Atkarību izraisošo vielu lietošanas izplatība un sekas Latvijā 2009.gadā. Tematisks ziņojums. 18.izdevums, Rīga. 31.-41., 47.-54.lpp. [In Latvian]
40. Walitzer K.S., Dearing R.L. (2006). Gender diferences in alcohol and substance use relapse. *Clinical Psychology Review*, 26(2), pp.128-148.
41. Yücel M., Lubman D.I., Solowij N., Brewer W.J. (2007). Understanding Drug Addiction: a neuropsychological perspective. *Australian and New Zealand Journal of Psychiatry*, 41(12), pp.957-968.

UZŅĒMUMU TEHNOLOĢISKĀS ABSORBCIJAS SPĒJAS ANALĪZES IESPĒJAS LATVIJĀ

ENTERPRISE TECHNOLOGY ABSORPTION READINESS ASSESSMENT MODEL IN LATVIA

Juris Tovstuļaks, mg.oec.,
Ventspils Augstskola, Inženieru 101, Ventspils, LV-3601
juris.tovstulaks@venta.lv, T.: 2 860 5757
Valdis Avotiņš, Dr.chem.,
Ventspils Augstskolas Inženierzinātņu institūts „Ventspils Starptautiskais radioastronomijas centrs, Inženieru 101, Ventspils, LV-3601
Valdis.Avotins@venta.lv, T.: 2 924 0951
Nataļja Jarohoviča, mg.oec.,
Ventspils Augstskola, Inženieru 101, Ventspils, LV-3601
Natalja.Jarohnovica@venta.lv, T.: 2 683 8344

Abstract. The paper aims to assess the feasibility of establishing the technological absorption readiness assessment model and test it with selected companies in Latvia. The approach was based on the World Bank's Korean economy enterprises innovation readiness assessment model, which was adapted to a technological absorption readiness model for local enterprises.

The study deals with one of the key business priorities – technological development for business growth and the increase of its productivity. The first part of the study is devoted to the theory of technology transfer, with special emphasis on technology absorption readiness, its origins and factors contained therein. The second part covers technology absorption at the company and national level. The third and fourth part of the study describes methodology development process and achieved results.

The developed tool of technology absorption readiness assessment creates a platform to analyse companies' potential to adopt new technologies and related needs, monitor identified weaknesses and bottlenecks for further growth and design new policy measures to increase firms competitive potential.

Keywords: technology transfer, technology absorption, technology absorption readiness, innovation.

Ievads

Plaisa starp attīstīto un jaunattīstības valstu tehnoloģiskās attīstības pakāpēm ir ļoti plaša, bet pirmais iespējamais solis, lai to mazinātu, ir veiksmīga tehnoloģiju absorbcija [1]. Spēja absorbēt jeb *„pieņemt, apgūt un pielietot"* jaunas tehnoloģijas un zināšanas ir ļoti nozīmīgs mehānisms, lai paātrinātu industriālo attīstību, kā arī lai paaugstinātu uzņēmumu darba ražīgumu un veicinātu ekonomisko izaugsmi [2]. Absorbcijas spēja, reaģējot uz izmaiņām globālajā ekonomiskajā vidē, ļauj uzņemt, izmantot, pielāgot un mainīt esošās tehnoloģijas, kā arī radīt jaunas tehnoloģijas un izstrādāt jaunus produktus un procesus [3].

Produktu inovatīvu uzņēmumu īpatsvars Latvijā ir tikai 6,6% pret 12-15% attīstītajās valstīs [4]. Lai izprastu esošo situāciju, saskatītu Latvijas uzņēmumu priekšrocības un trūkumus un noteiktu turpmākos rīcības plānus, ir nepieciešams regulāri novērtēt un analizēt Latvijas uzņēmumu

spēju atrast, pārnest, adaptēt un ieviest jaunas tehnoloģijas uzņēmējdarbībā. Šī pētījuma mērķis bija izstrādāt uzņēmuma tehnoloģiju absorbcijas gatavības novērtēšanas modeli.

Rezultāti un diskusija

Absorbcijas spējas jēdziens

Uzņēmējdarbības vadībā „absorbcijas spēja" ir jēdziens, kuru 1990.gadā pirmo reizi ieviesa Koens un Levintāls [5]. Zinātnieki norādīja, ka, lai organizācija būtu inovatīva, tai ir jāattīsta absorbcijas spēja un ka to iespējams pētīt dažādos līmeņos: personas, grupas, uzņēmumu vai valsts līmenī. „Absorbcijas spējas" jēdziens pirmo reizi tika definēts kā uzņēmuma „spēja atpazīt jaunas informācijas vērtību, uzņemt un piemērot to komerciāliem mērķiem" [6]. Saskaņā ar Koena-Levintāla modeli par absorbcijas spējas pamatu tiek pieņemti ieguldījumi pētniecībā un attīstībā (turpmāk P&A) [5].

Nākamie pētījumi [7] uzsvēra arī citu faktoru nozīmi organizācijas absorbcijas spējas attīstībā, kas izraisīja nepieciešamību pārskatīt izpratni par absorbcijas spēju, sadalot jēdzienu divās daļās: „absorbcijas spējas potenciāls" un „absorbcijas spējas pielietošana". Jaunā definīcija absorbcijas spēju skaidroja kā: „organizatorisko procesu kopumu, ar kuru uzņēmums iegūst, uzņem, pārveido un izmanto zināšanas, lai veidotu dinamiskas organizatoriskās spējas" [7]. Šis modelis nosaka, ka absorbcijas spējas potenciāls veidojas no diviem elementiem: „zināšanu iegūšanas spējas", kas apzīmē uzņēmuma spēju identificēt un iegūt ārēji radītās zināšanas, kuras ir būtiskas uzņēmuma darbībai, un „apguves spējas", kas attiecas uz uzņēmuma iekšējiem procesiem un ļauj analizēt, apstrādāt, interpretēt un saprast informāciju, kas iegūta no ārējiem avotiem. Savukārt, absorbcijas spējas izmantošana veidojas no "pārveidošanās spējas", kuru var definēt kā uzņēmuma spēju attīstīties un pārstrādāt ierasto kārtību, kā arī no uzņēmuma „spējas pielietot" jauniegūtās zināšanas ražošanā vai pakalpojumu sniegšanā, no tā gūstot finansiālu labumu [7].

Savukārt, M.Rogers [8] norāda, ka absorbcijas spēja sastāv no trim galvenajām sastāvdaļām: ārvalstu tehnoloģiju pieejamības, mācīšanās spējas un motivācijas jaunu tehnoloģiju ieviešanā. Absorbcijas spēja bez spējas mācīties attīsta arī problēmu risināšanas un radošās prasmes. Mācīšanās spējas nepieciešams attīstīt, lai spētu pārņemt citur radītās zināšanas, savukārt problēmu risināšanas prasmes ir spēja radīt jaunas zināšanas. Linsu Kims [3] uzsvēra, ka absorbcijas spēju veidojošs un ļoti būtisks faktors ir iepriekšējās zināšanas un prasmes, kas lielā mērā nosaka uzņēmuma spēju uztvert un pielietot jaunās tehnoloģijas. Saskaņā ar šo pieeju tehnoloģiju absorbcijas spēju ietekmē iekšējā un ārējā vide, kurā uzņēmums darbojas.

Absorbcijas spējās ietilpst ne tikai materiālās un tehniskās zināšanas, bet arī izpratne par to, kur ārpus organizācijas ir pieejamas noderīgas papildus zināšanas. Uzņēmumi, kuri attīsta plašu un aktīvu ārējo kontaktu tīklu, stiprina darbinieku informētību par citu uzņēmumu spējām, zināšanām un tehnoloģisko konkurētspēju. Inovatīvajiem uzņēmumiem raksturīgas ir attīstītas plašas ārējās attiecības ar ārvalstu tehnoloģiju piegādātājiem, pircējiem, vietējām universitātēm un valsts pētniecības institūtiem. Absorbcijas spēja ļauj uzņēmumiem novērtēt jaunas ārējās informācijas nozīmi, kā arī uzņemt un pielietot to komerciāliem mērķiem. Tā arī aktivizē uzņēmumu būt atvērtāku pret jaunām tehnoloģiskām iespējām, kā arī agresīvāk meklēt jaunas iespējas izmantot un attīstīt savu tehnoloģisko potenciālu. Absorbcijas spēja arī ļauj uzņēmumam precīzāk prognozēt tehnoloģiju attīstību un komerciālo potenciālu [3].

Arī cilvēkos ietverta ārējā informācija var būtiski papildināt zināšanas - piemēram, nesen darbā pieņemtie zinātnieki un inženieri, kuri mācījušies un guvuši pieredzi attīstītajās valstīs. Mašīnās ietverta informācija ir kritisks tehnoloģiju pārneses veids uzņēmumiem, lai veiktu reverso inženieriju (reverse engineering). Arī drukāta informācija, piemēram, pārdošanas katalogi, tehniski rasējumi, tehniskās specifikācijas un tirdzniecības žurnāli kalpo uzņēmumiem kā nozīmīgs avots jaunām zināšanām. Tehnoloģiju un aprīkojuma piegādātāji, kā arī paši ražotāji bieži var sniegt kritiski svarīgu informāciju par tehnoloģiju un procesu attīstību. Visbeidzot, universitātes un valsts pētniecības centri bieži ir nozīmīgi jaunas zinātniskās un tehniskās informācijas avoti [3].

Autori [3] norāda, ka absorbcijas spēja stiprina ražošanu un pētniecību un attīstību un to, ka ražošanas pieredze un pētniecības un attīstības izmēģinājumi paaugstina iesaistīto personu un to uzņēmumu zināšanas, tādējādi palielinot absorbcijas spējas. Absorbcijas spējas var attīstīt arī kā ražošanas procesu blakusproduktu – mācīšanās un attīstība notiek ražošanas procesu laikā. Jo vairāk uzņēmums praktizē savu darbību, jo spējīgāks tas kļūst jomā, kurā tas jau darbojas. Bez tam ražošanas pieredze ļauj uzņēmumiem apzināties un izmantot jaunu informāciju, kas attiecas uz noteiktām ražošanas metodēm, lai uzlabotu savus procesus. Absorbcijas spējas veicina P&A un ražošanu, bet ražošanas pieredze un P&A pētījumi, savukārt, rada absorbcijas spējas. Pētniecības un attīstības darbības ļauj uzņēmumiem apzināties jaunu un nozīmīgu ārējo signālu nozīmi un izpētīt pieejamo informāciju daudz efektīvāk [3]. Būtisks faktors tehnoloģiju absorbcijas gatavībai ir arī darbinieku apmācība. Uzņēmumam, lai attīstītu darbinieku (uzņēmuma) zināšanas, ir jānodrošina regulāras apmācības.

Makroekonomiskā vide (rūpniecības, tirdzniecības, zinātnes/tehnoloģijas un monetārās politikas), kurā uzņēmumi darbojas, tieši un netieši ietekmē absorbcijas spēju attīstības procesu. Formālās izglītības sistēmas veids, lielums un stāvoklis ietekmē nepieciešamos cilvēkresursus, kas

simbolizē uzņēmumu pamata spējas un prasmes. Sociālā kultūras vide un vadības veids veido organizāciju locekļu, kas ir iesaistīti organizācijas absorbcijas spēju attīstīšanā, normas, vērtības un vajadzības [3].

Tehnoloģiju absorbcija

Inovācijas procesu parasti neietekmē valstu un organizāciju robežas; tā netiek saistīta ar kādu konkrētu uzņēmumu, universitāti, klasteri, pilsētu, reģionu vai valsti. Jebkurā laikā un vietā var satikties gan „inovācijas radītājs", gan „inovācijas absorbētājs". Uzņēmumi, universitātes vai pat indivīdi tipiski zināšanas absorbē krietni vairāk, nekā tās rada. Ir nepieciešams mācīties no inovācijas, kas izstrādāta citur, lai radītu ekonomisku labumu šeit [9]. Tehnoloģiju absorbcija ir nozīmīgs solis cilvēku kapitāla un ražošanas bāzes attīstībā. Spēja absorbēt jeb „pieņemt, apgūt un pielietot" jaunas tehnoloģijas un zināšanas ir ļoti nozīmīgs mehānisms, lai paātrinātu industriālo attīstību, kā arī lai paaugstinātu darbinieku ražīgumu un veicinātu ekonomisko izaugsmi [2].

Ārējo tehnoloģiju absorbcija reti kad notiek viegli un vienkārši. Tā rada nopietnus sarežģījumus daudziem reģioniem un valstīm. Patiesībā tā var būt vienīgais vissvarīgākais faktors, lai veicinātu valsts attīstību vai izkļūtu no stagnācijas. Tomēr, politikas aprindās absorbcijas spēja tiek bieži aizmirsta vai sajaukta ar inovācijas spēju, kas pati par sevi tiek saprasta vienīgi kā spēja radīt jaunas zināšanas, un tad tās veiksmīgi komercializēt. Taču, apskatot vairumu pieejamos inovācijas spējas indeksus, var secināt, ka lielākoties reģioni un valstis ir inovācijas „absorbētāji", ne inovācijas „radītāji". Tādējādi, no politikas veidotāju viedokļa skatoties, izaicinājumam „turēt līdzi" būtu jābūt daudz nospiedošākam kā izaicinājumam būt līderim inovācijas ziņā. Šis elements – konkrētās vietas spēja „absorbēt" (zināšanas) - ir ļoti svarīgs gan inovatoru sabiedrībai, gan inovācijas politikas veidotājiem [2].

Lai identificētu, apgūtu un izmantotu tehnoloģiju līderu valstu ģenerētās zināšanas, mazāk attīstītām valstīm ir jāattīsta absorbcijas spējas. No konverģences hipotēzes viedokļa, valstīm, kas atpaliek no tehnoloģiju līderu valstīm, ir tā saucamā „atpalicības priekšrocība" jeb iespēja, ka atpalicēji var apgūt jaunās zināšanas, kuras radījuši tehnoloģiju līderi. Tas nozīmē, ka valstis, kas atpaliek no tehnoloģiskajiem līderiem, var gūt labumu no zināšanu pārplūšanas (spill-overs). Tā kā inovācija un tehnoloģiskais progress tehnoloģiju līderu valstīs ir atkarīgs no spējas radīt jaunas zināšanas un salīdzinoši nelieli sasniegumi tiek veikti regulāri, sekundārās zināšanas, kas izplūst no tehnoloģiju līderu valstīm, var palielināt zināšanu izaugsmes tempus atpalicējvalstīs. Efektīvi uzņemot līderu valstīs radītās sekundārās zināšanas, mazāk attīstītās valstis var sasniegt lielāku

tehnoloģiskās attīstības ātrumu un samazināt tehnoloģisko atpalicību, vai pat panākt līderus tehnoloģiskajā attīstībā [10].

A.Vatkins [11], apskatot Austrumāzijas valstu attīstības modeļus, norāda, ka jaunattīstības valstīm sākotnēji ir jāiegūst un jāimitē attīstīto valstu radītās zināšanas, lai vēlāk tās apgūtu un pielietotu savā darbībā. Un tikai pēc tam, kad šie posmi ir apgūti, tad valstis ir spējīgas jau šīs zināšanas uzlabot un/vai radīt pašas [11].

Valsts absorbcijas spēja zināmā mērā ir atkarīga arī no tā, cik liels skaits augsti kvalificētu pētniecības un attīstības speciālistu šajā valstī ir nodarbināti. Tomēr daudz svarīgāka par to ir efektīva pētniecības un attīstības komercializācija. Tādēļ pastāv uzskats, ka zinātniekiem un inženieriem ir jābūt vairāk nodarbinātiem ražošanas nozarē nekā universitātēs un valsts pētniecības centros [10]. Arī kultūra ir viens no faktoriem, kas nosaka valsts tehnoloģisko konkurētspēju. Individuālisma sabiedrībā tiek pieņemti individuāli un ātrāki lēmumi, lai pieņemtu jaunas idejas, produktus un procesus. Sabiedrības ar vienkāršāku hierarhiju struktūru pretēji kolektīvajām sistēmām ir mazāk atsaucīgas pret norādījumiem vai vadlīnijām izmēģināt kaut ko jaunu [12].

Tehnoloģiju absorbcija ietver uzņēmumam jaunu un bieži citur izstrādātu jaunu produktu un ražošanas procesu apgūšanu un pārņemšanu; esošo produktu un procesu uzlabošanu, tehnoloģiju licencēšanu, uzņēmuma efektivitātes uzlabošanu un kvalitātes sertifikātu iegūšanu [12].

Uzņēmumiem jāņem vērā tas, ka tehnoloģijas absorbcija ir sarežģīts dažādu darbību komplekss, kas ir atkarīgs no paša uzņēmuma spējas absorbēt un organizatoriskās mācīšanās [13]. Lai gan lieliem uzņēmumiem ir lielākas iespējas un resursi jaunu tehnoloģiju attīstīšanā un ieviešanā, bieži tieši MVU ir efektīvāki jaunu tehnoloģiju ieviešanā, jo tajos mazāka birokrātija un lēmumi tiek pieņemti ātrāk [13].

Starp MVU pastāv atšķirības to spējās un motivācijā apgūt un izmantot jaunas tehnoloģijas. Nelielai daļai MVU ir spēcīga iekšējā tehnoloģiskās attīstības kapacitāte, augsti kvalificēti vadītāji un darbinieki, un tie, protams, bieži ir tehnoloģiskie līderi savās nozarēs un tirgos. Taču vairums MVU seko tehnoloģiskajai attīstībai (biežāk tās izmanto nekā attīsta), tajos strādā salīdzinoši mazāks kvalificētu darbinieku skaits, bet MVU īpaši kapitāla ietilpīgajās nozarēs (ražošana un smagā rūpniecība), ir samērā vienaldzīgi pret jaunām tehnoloģijām un zināšanām. Lielākā daļa tehnoloģiju difūzijas atbalsta aktivitāšu biežāk vērsti uz pirmo divu uzņēmumu grupām, lai gan trešajā grupā nozīmīga loma varētu būt tieši procesa un organizatoriskai inovācijai, kas par salīdzinoši nelielām izmaksām ievērojami var uzlabot šo uzņēmumu efektivitāti [14].

Tomēr pat starp tehnoloģiski attīstītiem MVU bieži pastāv būtiski šķēršļi, kas palēnina, pat traucē jaunu tehnoloģiju un zināšanu absorbciju, īpaši salīdzinot ar lielajiem uzņēmumiem. Parasti

mazāku uzņēmumu vadītāji saskaras ar tādām problēmām kā laika, izmaksu un tehnisko zināšanu trūkums, kas traucē iegūt informāciju par jaunām tehnoloģijām, aparatūru, programmatūru, ražošanas procesiem, vadības metodēm vai apmācībām. Lai gan uzņēmumi apzinās, ka pastāv ārēji informācijas avoti, tie ne vienmēr zina, kur meklēt, kas var palīdzēt, kam uzticēties. Šķērslis var būt arī finanšu resursu pieejamība, lai iegūtu jaunās tehnoloģijas un zināšanas [14].

Tehnoloģiju absorbcijas spējas novērtēšanas modeļa izveide

Lai veicinātu tehnoloģiski orientētu un produkciju ar augstu pievienoto vērtību ražojošu uzņēmumu attīstību, būtiski jau sākuma etapā izvērtēt uzņēmumu pašreizējo tehnoloģisko kapacitāti un to attīstības perspektīvas. Ņemot vērā tehnoloģiju absorbciju ietekmējošos faktorus un Pasaules Bankas izstrādāto Korejas uzņēmumu inovācijas kapacitātes novērtēšanas metodiku [16], tālāk tiek izstrādāts Tehnoloģijas absorbcijas spējas novērtēšanas modelis un aprakstīti izstrādātās metodikas rezultāti, kuru pamatā divas pasaulē atzītas metodikas.

Pēc pirmās metodikas [15] uzņēmums tiek izvērtēts pēc 9 parametriem, kas ir izvēlēti saskaņā ar profesora Džona Besanta (angļu val. John Bessant) izstrādāto tehnoloģiskā audita instrumentu, kas dod iespēju novērtēt atsevišķu uzņēmumu tehnoloģisko kapacitāti. Pēc tam, saskaņā ar „Inovācijas kapacitātes kāpņu" metodi, parāda izvērtējamā uzņēmuma vietu tehnoloģiskās attīstības procesā un tā inovatīvo kapacitāti. Inovācijas kapacitātes kāpnes sastāv no 4 pakāpieniem jeb grupām: A, B, C un D. Grupas A uzņēmumiem ir viszemākais inovācijas kapacitātes līmenis, bet Grupā D atrodas uzņēmumi - inovācijas līderi [15].

Tehnoloģiju absorbcijas spējas novērtēšanas metodika tika veidota, apvienojot [15] un [16] metodikas. Sākotnēji tika izveidoti tehnoloģiju absorbcijas spēju veidojošie indikatori, kuri tika sadalīti četrās lielajās jeb galvenajās kopās – (1) pārveidošanās spēja; (2) zināšanu iegūšanas spēja; (3) sadarbības spēja un (4) izmantošanas spēja. Šajās 4 grupās, savukārt, tiek iekļauti Korejas metodikā ietvertās deviņas MVU tehnoloģiju spēju apakškopas. Pārveidošanās spējā tiek iekļautas *sazināšanās* un s*tratēģijas*; zināšanu ieguves spējā – *meklēšanas, kompetences, pieejamības un apmācības apakškopas*; sadarbības spējā tiek iekļauta *sadarbības* apakškopa*;* un izmantošanas spējā tiek iekļautas *iegādes* un *ieviešanas* apakškopas**.**

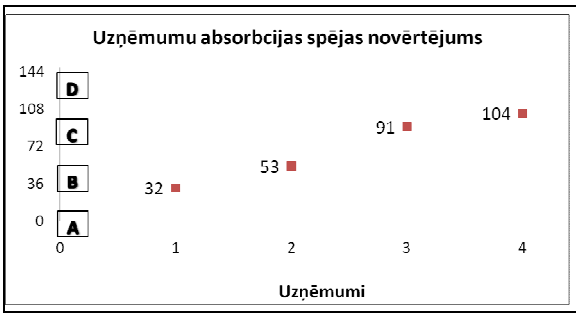
Pamatojoties uz izstrādātajiem indikatoriem, tika izveidota uzņēmumu aptaujas anketa ar 38 jautājumiem (novērtējot katru apgalvojumu diapazonā no 1 līdz 4 punktiem: 1 – 100% nepiekrītu; 2 – vairāk nepiekrītu, kā piekrītu; 3 – vairāk piekrītu, kā nepiekrītu; 4 – 100% piekrītu, kā arī 0 punkti, ja nav īsti atbildes uz jautājumu). Pēc uzņēmumu aptaujas rezultātā iegūto punktu summu

atbilstoši izstrādātai metodikai, tika aprēķināti šī uzņēmuma tehnoloģiju absorbcijas spējas koeficienti.

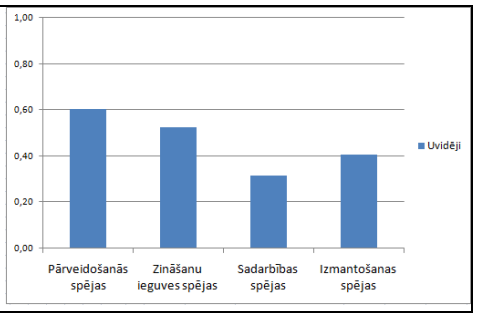
Līdzīgi kā Pasaules Bankas izstrādātās Korejas uzņēmumu inovācijas spējas novērtēšanas metodikā, arī uzņēmumu tehnoloģiju absorbcijas modelī uzņēmumi tika sakārtoti 4 pamata grupās. Katras grupas norādītās vērtības tiek iegūtas, pēc uzņēmuma aptaujas, summējot apakškopas un kopas indikatoru punktu summas, tiek aprēķināti šī uzņēmuma tehnoloģiju absorbcijas spējas koeficienti.

Rezultāti

Lai novērtētu izveidotās tehnoloģiju absorbcijas spējas novērtēšanas metodiku, tika aptaujāti četri ražojoši uzņēmumi, kurus bija iespējams ievietot katru savā grupā (attēls 1).

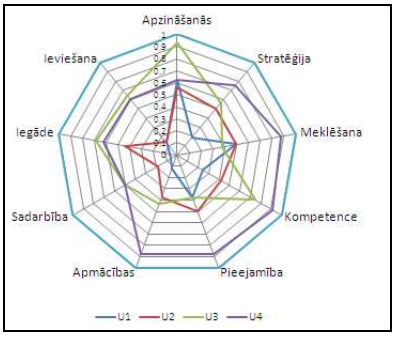


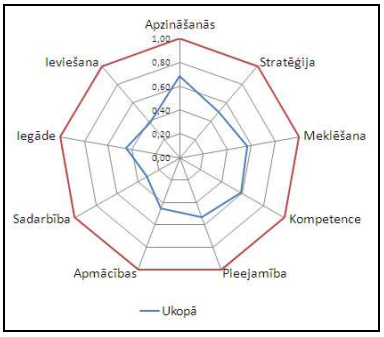
Attēls 1. Uzņēmumu tehnoloģiju absorbcijas spējas novērtējums



Attēls 2. Uzņēmumu vidējais rādītājs četrās pamata dimensijās

Pēc aptaujas rezultātiem iespējams novērtēt vispārējo situāciju autora noteiktajās četrās pamata kopās – pārveidošanās, zināšanu iegūšanas, sadarbības un izmantošanas (attēls 2). Ir iespējams novērtēt gan katra uzņēmuma spēju katrā kopā, gan, veicot apjomīgāku aptauju, vidējo rādītāju, piemēram, nozarē. Šajā gadījumā redzams, ka uzņēmumi sliktāko rādītāju sasnieguši tieši spējā sadarboties. Uzņēmumi neiesaistās dažādos starptautiskos projektos un programmās, nesadarbojas ar universitātēm un pētniecības institūtiem, neizmanto arī vietējos un starptautiskos tīklus (EEN, BAN, CONNECT, inkubatori u.c.) un maz sadarbojas ar asociācijām. Tāpat uzņēmumus ir iespējams novērtēt deviņās apakškopās. Uzņēmumu individuālie un vidējais rādītāji parādīti attēlos 3. un 4.





Attēls 3. Uzņēmumu 9 dimensijas atsevišķi **Attēls 4. Uzņēmumu 9 dimensijas vidēji**

Attēlos parādīts, ka uzņēmumiem sliktāki rādītāji ir tādās apakškopās kā tehnoloģiju iegāde un ieviešana, sadarbība ar tehnoloģiju radītājiem, universitātēm un pētniecības centriem. Tāpat uzņēmumi maz līdzekļu velta darbinieku apmācībām. Taču uzņēmumi apzinās savus trūkumus, daļēji arī zina kur meklēt nepieciešamās tehnoloģijas, kā arī uzskata, ka tiem ir nepieciešamās kompetences, lai ieviestu un pielietotu jaunas ar uzņēmuma darbību saistītas tehnoloģijas. Pēc šo rādītāju novērtējuma ir iespējams uzņēmumiem rekomendēt veikt uzlabojumus sliktāk novērtētajās apakškopās, kā arī palīdzēt saprast šo faktoru nozīmīgumu. Piemēram, uzņēmumam U3. (attēlā nr.3) būtu ieteicams izvērtēt nepieciešamību uzlabot sadarbības spējas, kā arī palielināt investīcijas darbinieku apmācībai un izstrādāt vai uzlabot esošo uzņēmuma stratēģiju.

Secinājumi

1. Spēja absorbēt jeb *„pieņemt, apgūt un pielietot”* jaunas tehnoloģijas un zināšanas ir ļoti nozīmīgs priekšnosacījums, lai paātrinātu reģiona industriālo attīstību, kā arī lai paaugstinātu uzņēmumu darba ražīgumu un veicinātu to ekonomisko izaugsmi.
2. Organizatoriskā un procesa inovācija dod lielāku ekonomisko atdevi, salīdzinot ar radikālo inovāciju. Tehnoloģiju pārnese ar sekojošu adaptāciju un absorbciju ir efektīvāka, salīdzinot ar endogeno pētījumu rezultātu (jaunradīto tehnoloģisko izstrādņu) komercializāciju.
3. Viertējo radīto jauno zināšanu komerciāls pielietojums ir nozīmīgs daudzu ES reģionu attīstībā, tomēr spēja pārnest, absorbēt un izmantot citur radītās zināšanas var dot vairākkārt lielāku atdevi tautsaimniecībai, īpaši nelielai ekonomikai ar niecīgu finansējumu zinātnei, nelielu tās potenciālu un nepietiekamu pieredzi un tradīcijām zināšanu komercializācijā. Tāpēc Latvijai sava inovācijas politika jāveido, rīcības plānā izdalot aktivitātes un pietiekamus resursus uzņēmumu tehnoloģiju pārneses un

tehnoloģiju absorbcijas spējas palielināšanai. Svarīgi paralēli papildinātajām rīcības plāna aktivitātēm (uzņēmēju izglītošanai, sadarbības ar pētniecības organizācijām veicināšanai, speciālu studiju kursu izveidei utt.) izveidot arī tehnoloģiju absorbcijas efektivitātes monitoringa sistēmas izveidi, kurā liela nozīme būtu tehnoloģiju absorbcijas spējas novērtēšanas metodikai, kas ir piedāvāta šajā darbā. Tāpat, jāveido jaunas starpdisciplinārās studiju programmas, kas apvieno vadībzinātnes un inženierzinātnes, tajās paredzot noteiktu kursu apjomu veltīt tehnoloģiju pārnesei un absorbcijai.

4. Uzņēmumiem, lai uzlabotu savas spējas absorbēt tehnoloģijas, ir jāpalielina ieguldījumi darbinieku apmācībās, jāveicina atvērtas inovācijas kultūras nostiprināšana, jāpievērš lielāka uzmanība sadarbībai ar tehnoloģiju izstrādātājiem un piegādātājiem, jāseko līdzi ar uzņēmumu saistītām jaunākajām tehnoloģiju tendencēm pasaulē.
5. Mazie tehnoloģiskie uzņēmumi ir efektīvāki jaunu tehnoloģiju ieviešanā un tie ir efektīvāki arī jaunu tehnoloģiju absorbcijā. Korejas metodiku izmantoja, lai raksturotu uzņēmumu inovācijas kapacitāti; darbā veiktā analīze apliecina lietderību to izmantot, lai izstrādātu valsts tehnoloģiskās absorbcijas spējas novērtēšanas metodiku.
6. Pētījumā izstrādātā tehnoloģiju absorbcijas spējas novērtēšanas metodika ļauj novērtēt uzņēmumu gatavību iegūt, apgūt un ieviest jaunas tehnoloģijas. Tā dod iespēju arī uzņēmumiem novērtēt savas stiprās un vājās puses četrās noteiktajās apakškopās – pārveidošanās spējā, zināšanu ieguves spējā, sadarbības spējā un izmantošanas spējā.
7. Izveidotā metodikas ļauj izstrādāt uzņēmumu tehnoloģiju absorbcijas spējas novērtēšanas rīku, ar kura palīdzību uzņēmumi paši varētu novērtēt savu spēju iegūt un izmantot jaunas tehnoloģijas, kā arī saņemt rekomendācijas, kā iespējams uzlabot jomas ar sliktākie rādītājiem.
8. Lai iegūtu Latvijas uzņēmumu sadalījumu pēc to tehnoloģiju absorbcijas spējas, un novērtētu detalizētāk izveidotās metodikas lietderību, nepieciešams anketēt lielāku skaitu ražojošo uzņēmumu, paralēli saņemot uzņēmumu ierosinājumus par anketā nepieciešamajām izmaiņām un papildinājumiem.

Izmantotās literatūras avotu saraksts

1. Arogyaswamy Bernard, Elmer Wally, Technology Absorption in Emerging Nations: An Institutional Approach, Journal of East-West Business, Sērija Nr.10, Izd. Nr. 4, 2005, 79.lpp.
2. The World Bank, Globalization and Technology Absorption in Europe and Central Asia, 2008, 150 lpp.
3. Linsu Kim, „Absorptive Capacity and Industrial Growth: A Conceptual Framework and Korea's Experience", Korea University, 1991, 39 lpp.
4. 2006.-2008.gadi. CSP datu bāzes, http://data.csb.gov.lv/Dialog/Saveshow.asp; skatīts 30.08.2011.

5. Cohen and Levinthal, Absorptive capacity: A new perspective on learning and innovation, *Administrative Science Quarterly*, Volume 35, Issue 1, 1990, 128-152 lpp.
6. Definition of Absorptive Capacity: Pieejams: http://en.wikipedia.org/wiki/Absorptive_capacity, http://economics.about.com/cs/economicsglossary/g/absorptive_cap.htm, skatīts 12.12.2010.
7. Zahra and George, Absorptive Capacity: A Review,Reconceptualization,and Extension, Academy of Management Review, Volume 27, Issue 2, 2002, 185-203 lpp.
8. Rogers M., „Absorptive capability and economic growth: how do countries catch-up?", Cambridge Journal of Economics 2004, Issue 28, 579.
9. NESTA, „Innovation by Absorption. Measuring & Mapping Innovation in UK Nations & Regions", 2008, 112 lpp.
10. Lankhuizen, Maureen, "Catching Up, Absorption Capability and the Organisation of Human Capital", 1998, Maastricht 25.lpp.
11. Alfred Watkins, Education, Science, Technology, and Innovation, Workshop on Technology Innovation, 2005; http://info.worldbank.org/etools/docs/library/144037/Alfred_Watkins.pdf, skatīts 29.08.2011.
12. Arogyaswamy Bernard, Elmer Wally, Technology Absorption in Emerging Nations: An Institutional Approach, Journal of East-West Business, Sērija Nr.10, Izdevums Nr. 4, 2005, 82.lpp.
13. Anjan Roy, Arijit Sikdar. Technology Absorption in Large and Small Enterprises: A proposal for Comparative research 1, Journal of Entrepreneurship, Volume 12, 2003, 185.lpp.
14. Philip Shapira, Stuart Rosenfeld. An Overview of Technology Diffusion Policies and Programs to Enhance the Technological Absorptive Capabilities of Small and Medium Enterprises, 1996, USA, http://www.prism.gatech.edu/~jy5/pubs/oecdtech.htm , skatīts 2011.gada 30. augustā.
15. LR IZM un Latvijas Tehnoloģiskā centrs. Pētījums par Nacionālās inovācijas sistēmas attīstību Latvijas sociāli-ekonomiskajā vidē un praktiski pasākumi inovatīvās darbības veikšanai: zinātnisko pētījumu, tehnoloģiju pārneses, starptautiskās sadarbības atbalsta programmu un inovatīvo struktūru ietekme uz jaunu tehnoloģiski orientētu firmu veidošanos un jaunas, zinātņietilpīgas produkcijas ražošanu.
16. The World Bank, "Korea: How Firms Use Knowledge, Part A – Firm Level Innovation in the Korean Economy", 2002, Vashington.

FINANCING OF INNOVATIONS: PROBLEMS AND OPPORTUNITIES IN LATVIA

Artis Zablockis
Professional master's degree
Business management
BA School of Business and Finance
Lašu street 5-60, Jurmala, Latvia, LV-2010
Artis.Zablockis@inbox.lv
+37129129292

Abrstract. One of the leading contemporary strategic management thinkers professor Michael Porter identifies three stages of development of nations regarding competitiveness: factor-driven economy, investment-driven economy and innovation-driven economy. Developed countries of the world nowadays have moved to the latter model which is based on heavy attention to and investment in research and development. Current tendencies of development of countries are based not only on basic factors of production like natural resources, labor and capital but more and more on developed factors like technology, infrastructure, knowledge, access to different forms of financing. Development and competitiveness of modern economies are unthinkable without serious investment in innovations.

Currently innovative companies face financing problems. Money lenders are not ready to lend money to innovative companies at the early development stages qualifying such deals as a high risk deals. Traditional financial sources are not suitable for innovative companies as cash flow of companies in early stages is mostly negative.

There are several ways how to finance innovations. Typical types of financing innovations in Latvia are government and municipality capital, company capital, EU fund programs, capital investments, grants and guaranties as well as business angels.

This paper will analyze and explain theoretical background of innovation financing possibilities in Latvia. Author will compare traditional sources of financing innovation and will stress strengths and weaknesses of each type as well as prepare suggestions for improvement of existing situation. The aim of this paper is to determine the most convenient and appropriate ways of financing innovation in Latvia.
Keywords: Innovations, financing, competitiveness, capital.

Introduction

National economy of Latvia as a small opened economic country depends of possibility to create and accomplish competitive service and products in world market. Possibility to create new ideas and accomplish them in business is the main driving force to be a developed country. Important problem of implementing new technologies and ideas is the financing. Entrepreneurs are facing innovation financing problems thus slowing down whole development and competitiveness of the country. In theory there are two ways how to get financing – internal and external financing. This paper will compare traditional sources of financing innovations and will stress strengths and weaknesses of each type as well as give suggestions for improvement of existing situation. Paper will determine the most convenient and appropriate ways of financing innovation in Latvia. Both quantitative analyses of indicators and qualitative analysis of economic policy decisions and theoretical aspects are analyzed within this paper.

Financing need of innovations

Development is one of the most important issues in nowadays. Measured by levels of economic development, defined by Michael Porter (1990), top developed countries have chosen the innovation driven economy. There are many theoretical definitions of innovations, but in practical way innovation is new products, new processes, new ways to penetrate new markets, new supply sources or distribution methods and new industries (Schumpeter, 1983). An innovation includes many additional factors like skilled personnel, wages, organization structure, marketing and communication with government and investors. The importance of each factor depends on region where entrepreneur is operating, but of the hardest questions for all region innovative enterprises is financing. Financial needs of innovative enterprises vary according to type of production or service, development and implementation costs. For any given innovation the Entrepreneur may, but need not, be the person who furnishes the capital. (Schumpeter, 1983) Therefore entrepreneurs have to attract financing for innovations either from internal or external resources.

Table 1

Financing sources by development stages

Development stage	**Financial source**
Seed stage	Owner money. Grants
Start-up stage	Business angels
Early-growth	Venture capital Bank loan
Expansion	Bank Loan Stock Market

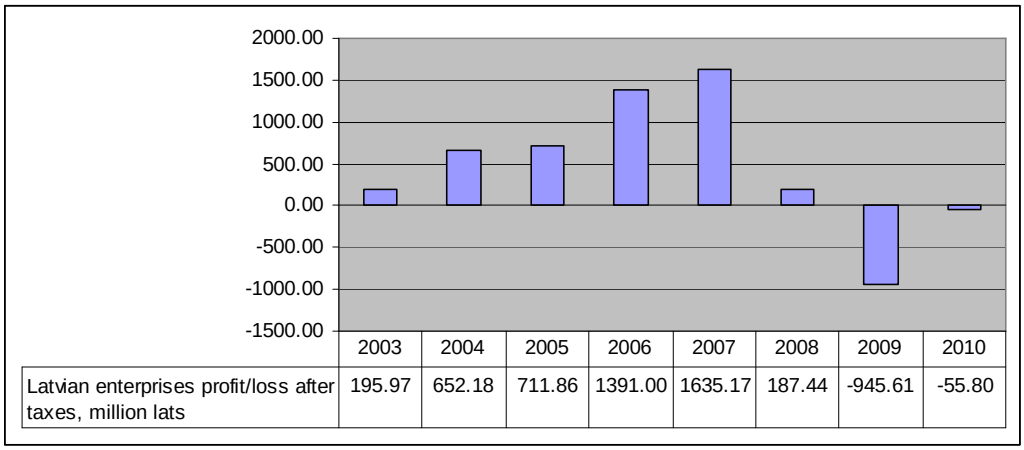
Source: Compiled by author

Each innovator meets financial fund need in different stages. Some are facing this problem in seeding stage when making research of possible business concepts and trying to understand the viability of their idea. Others need to raise funds in start up stage when innovators are registering their legal entities and making additional researches of potential market. In next stage innovative enterprises are making first business deals. In this stage first economical growth is recognized, therefore companies need rise financial funds to proceed with economical growth. In final stage companies are improving company growth where financial investments are needed to become stabile company and play key role in the market. Considering risks and amounts required each of mentioned stages has different types of financial sources (see Table 1).

Most innovation companies in Latvia are in first stages of development, wherewith financial pressure.

Analyses of current financing model of innovation in Latvia

The easiest way for new innovator is to use own money and invest to his business so called internal capital. Internal capital is money available for owner to invest in his business. Part of profit is the most common way for innovation financing from internal capital. Unfortunately last few year incidents in Latvian economy do not allow companies to be very profitable therefore companies in Latvia in 2009 and 2010 were working with more losses than profit therefore money for innovations has to be found in external capital sources (See figure 1).



	2003	2004	2005	2006	2007	2008	2009	2010
Latvian enterprises profit/loss after taxes, million lats	195.97	652.18	711.86	1391.00	1635.17	187.44	-945.61	-55.80

Source: Enterprise Register of Latvia

Figure 1. Profit/loss of Latvian enterprises after taxes, years 2003-2010, million lats

In seed stage often there is not enough with own money to make researches to understand the viability of the business idea. Innovators can apply for grants in seed stage in case owner financial funds are not enough. Grants provided by government or EU is effective way of financing in seed stage. One of providers for such programs in Latvia is called ALTUM that provides grants for entrepreneurship hedging and loan repayment.

Grants often are called “free money”, but in reality it looks different. Entrepreneurs in Latvia are facing very complicated application procedure therefore lots of companies fail to receive such financing. Unfortunately in Latvia bureaucracy is at high level therefore applications for such programs are mostly done by specialists to save time and avoid waste efforts. Idea itself is very good but lack of public intelligence and lack of professionals in public sectors slows down

Research and Development (R&D) sector therefore lots of great ideas doesn't reach the start-up stage.

In start-up stage as business partners are business angels. Angels are investors that are investing not only money but also knowledge, experience and coaching. They are supporting new entrepreneurs till company is able to stand on their own feet and becomes profitable. Business angels are not well known term for Latvian entrepreneurs however this type of investment is known as private investors. Latvian entrepreneurs can use two different types of business angels – local and foreign investors. Local business angels are private businessman that have been successful and have sold their successful business receiving income that can be used for new business investment. Such success stories in Latvia are not very much as there is small amount of successful and profitable companies in Latvia. Therefore local entrepreneurs have to find business angels abroad and attract them for investment. Typical business angel investment amounts are between 25 000 EUR and 250 000 EUR.

A problem that innovators meet in Latvia is availability of such business angels. But this not only problem of innovator as Latvia is not the most attractive country where business angels are searching for partners. Business angels also are facing same problem that they can not find high quality entrepreneurs. For such reason are created business angel networks were new innovators can find wide information of each business angel knowledge, experience and financial situation.

When the company is reached economical and commercial stability it enters in early growth stage were more serious financial tools can be used Economical strategy of venture capital investment is similar to business angels however amounts of such investments are much higher between 1 000 000 EUR and 4 000 000 EUR or more.

EU fund support programs in Latvia include support for venture capital investments. In this position efficiency is 100% as all support is used and agreement is signed with company Eiropas Investīciju Fonds that has agreements with partners AS „Swedbank", AS „SEB banka", SIA „BaltCap Management Latvia" and SIA „Imprimatur Capital Baltics" for capital fund establishment. Amount or signed agreement is 58 529 801,05 lats. During year 2010 in the framework of this program there is invested in 5 venture capital deals for amount of 1 440 748 lats (Ministry of Economics of Republic of Latvia, 2011, p.10). Such amounts are very small and not enough for innovators therefore entrepreneurs have to search for foreign partners

In last two years since economical crisis approached in 2008 foreign investments has dropped to minimum reaching lowest point in 2009. In 2010 foreign direct investment flow was reviving but still the amounts are much smaller than it was before crises in 2006, 2007 and 2008.

Table 2

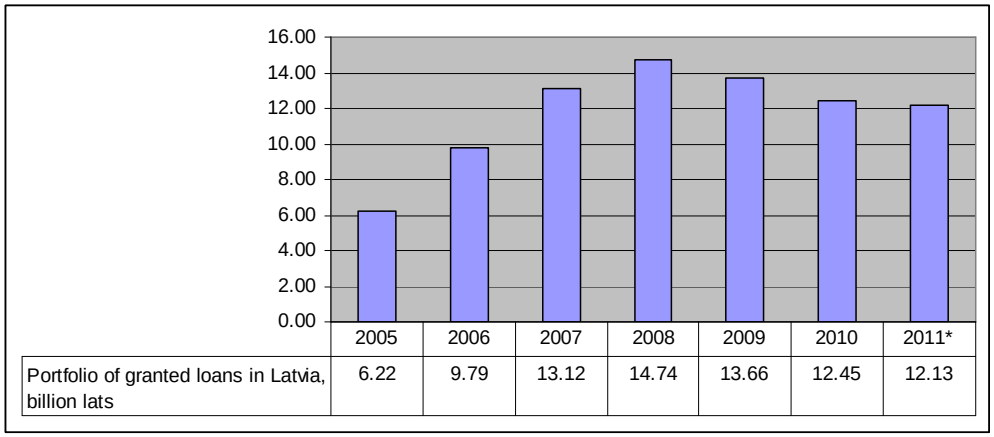
Foreign direct investment, Latvia, year 2008-2010, (mln. lats)

	1st quarter	2nd quarter	3rd quarter	4th quarter
2008	270.3	269.9	209.7	-143.5
2009	23.5	-114.2	106.8	31.5
2010	-72.7	44.0	119.7	94.5

Source: Central Statistical Bureau

According to Latvia's balance of payments 2010, foreign direct investment inflows increased in several kinds of activity, like real estate transactions (by 164.8 million lats, primarily from Luxemburg, Finland and Sweden), manufacturing (by 49.8 million lats, mainly from Ireland, Cyprus and Denmark), and agriculture and forestry (by 21.6 million lats, in particular from Sweden, Finland and Norway) (National Bank of Latvia bank, 2010). There are recognized positive tendencies of foreign investment flow however level of this flow is very low. Foreign investors, as previously before economical crises, are investing in real estate to get quick profit therefore this not most convenient and appropriate financial tool.

The key role in innovation development in Latvia is playing commercial banks even if innovators have availability for other financial tools. Bank sector was frozen for last two years since economical crisis took effort in Latvia in 2008. Banks were working on money saving and repossessing procedures leaving financing in second plan or wasn't financing at all. Financing amounts dropped dramatically and banks had loses from terminated agreements therefore portfolio of granted loans in Latvia heavy dropped in 2009 and 2010 (see Figure 2).



	2005	2006	2007	2008	2009	2010	2011*
Portfolio of granted loans in Latvia, billion lats	6.22	9.79	13.12	14.74	13.66	12.45	12.13

Source: Financial and Capital Market

Figure 2: Portfolio of granted loans in Latvia, year 2005-2011*, billion lats

Figure 2 also shows that significant drop of portfolio is stopped in 2011 first quarter where portfolio decreased for 320 millions lats however negative tendency remains. One of the indicators that bank sector starts to recover is bank profit. Profit of banks in Latvia in first five months of 2011 is 61,7 million lats comparing to previous year first five months - 203,1 million losses. Most important for innovators is that banks has started to grant new loans by reaching 197,87 million lats in the first quarter in 2011. According to frozen bank sector and slow recovery in nowadays, financing availability is very low; therefore new innovators have to find other solutions. One of the options is EU fund support programs. The most positive aspect is that EU support programs for entrepreneurship and innovations bulks 67,48% of total EU support in 2010, therefore acquirement of EU support programs are main issue for innovators.

Government role has to be increased and governments have to become a best partner for entrepreneur. This year government has agreed to reorganization plan of one of the government owned banks to become a development bank till 2013. This plan says that Hipotēku banka will be set as 100% development bank. This is a huge step closer to development and competitiveness of enterprises and whole country despite that plan has to be approved by European commission. Functions of development bank in Latvia should be to support enterprises in seed and start-up stages. Development bank is not going to be as competitor for commercial banks in local market, even more development bank can be partner for local commercial banks by shearing risks for shared customer. Hipoteku banka has been partly acting as a development bank already for many years, therefore bank has high level professionals that are able to find the best financial tools for development entrepreneurs. Therefore establishment of development bank will solve level of education and professional's problem as one of the development bank functions is coaching and educating. Employees of public sector have to be learned how to improve the quality of government role EU support acquirement as well as innovative enterprises have to be educated about support programs. Considering that financing of new enterprises, development bank has to work closely with Guarantee Agency that is supporting high risk deals with guarantees. Development bank financing has to be most convenient way of financing innovations in Latvia only it has to be improved to higher level. Despite development bank full establishment is planed only up to 2013, Hipotēku banka is already partly acting as development bank.

Conclusions

1. Enterprises in Latvia in 2009 and 2010 were working with more losses than profit. Total loses after taxes in 2009 and 2010 are one billion lats therefore money for innovation financing has to be found in external capital sources.
2. Typical financial tools like grants, business angels and venture capitals are not presented up to level that is needed, therefore most popular ways of financing innovations in Latvia is banks and EU funds
3. In 2010 foreign direct investment flow was reviving but still the amounts are much smaller than it was before crises in 2006, 2007 and 2008. Latvian economy is not attractive for foreign investors delaying development of innovations.
4. Banks are most convenient way of financing innovator despite the fact that total portfolio of granted loans in Latvia has fallen dramatically for 2,61 billion since 2009. Banking sector shows positive tendencies of recovery - profit of banks in Latvia in first five months of 2011 is 61,7 million lats comparing to previous year first five months - 203,1 million losses.
5. EU support programs for entrepreneurship and innovations bulks 67,48% of total EU support in 2010, therefore acquirement of EU support programs are main issue for innovators.
6. This year government has agreed to reorganization plan of Hipotēku banka to become a development bank till 2013. Efficient use of developments bank and well structured functions will make development bank financing most convenient tool of financing innovations and new enterprises.

References

1. Bank of Latvia (2010), Latvia's Balance of payments http://www.bank.lv/images/stories/pielikumi/publikacijas/LMB_2010.pdf - viewed on 21.06.2011
2. Central Statistical bureau of Latvia, http://www.csb.gov.lv/statistikas-temas/investicijas-galvenie-raditaji30252.html - viewed on 15.06.2011.
3. Dimov D. (2009), Policy Options and Instruments for financing Innovations: A practical Guide to Early-Stage Financing. – United Nations, 62 pages.
4. Enterprise Register of Latvia, http://www.lursoft.lv/lursoft-statistika/Uznemumu-pelna-pa-gadiem&id=1 – viewed on 10.06.2011.
5. Fan Q., Li K., Zeng D.Z, Dong Y., Peng R. (2009) Innovations for development and the role of government: A Persperctive from the East Asia and Pacific region.- World Bank, 204 pages.
6. Financial and Capital Market Commission of Latvia, http://www.fktk.lv/lv/statistika/kreditiestades/ceturksna_parskati/ - viewed on 20.06.2011.
7. Guarantee Agency of Latvia, http://www.lga.lv/kreditu-garantijas/.
8. Investment and Development of Latvia, http://www.liaa.gov.lv/lv/es_fondi/ - viewed on 16.07.2011.

9. Ministry of Economics of Republic of Latvia (2010), Report on EU fund financing activity establishment, http://www.em.gov.lv/images/modules/items/EMZin_120210_aktiv(1).doc.
10. Ministry of Economics of Republic of Latvia (2011), Report on EU fund financing activity establishment, http://www.em.gov.lv/images/modules/items/EMzin_2_29042011.doc.
11. Porter, Michael E. (1990), The Competitive Advantage of Nations, Macmilan press, 855 pages.
12. Schumpeter J.A. (1983) The Theory of Economic Development: An inquiry into profits, capital, credit, interest and the business cycle.- Transaction Publishers, 255 pages.

GLOBALIZĀCIJAS PROCESU IETEKME UZ SKOLAS JAUNIEŠU VĒRTĪBU IZVĒLI

IMPACT OF GLOBALIZATION PROCESSES ON THE CHOICE OF VALUES OF YOUNG PEOPLE

Spodra Austruma
PhD student of the Rezekne High Institut in Latvia
The State Education Centre in the Ministry of Science and Education of Latvia
Vaļņu 2.Rīga, LV1050
E-mail: spodra.austruma@visc.gov.lv; spodraa@yahoo.com

Abstract. In the context of the consumer culture, young people learn new lifestyle philosophy as a result of globalization processes and cultural changes. Values and morality, their study mechanisms and needs are historically predisposed. Every socialization and communication begins with self-analysis, the same as competence of every culture is examined within the specific culture-historical circumstances.

In modern globalization circumstances in social life is dominated economic activities, economic goals and economic criteria. The main concern of society is not innovation of education or solution of issues related with existence of nation, but the production of goods and consumption. Expansion of consumer values is expansion of principles of globalization in space. In the globalization culture needs of the individual are supreme, not the tribe, group or nation. Individual in global space frees himself/herself from connection with groups, he/she chooses his/her own values, social associations acts independently and individually takes responsibility for his/her choices and actions.

These types of culture may be correlation with the character of education and teaching. The content of mass communication and the market studies determine the wants of consumers; and not notions about what information would be necessary for a more worthy human life.

The politics of education should be given a special importance in the age of economic crisis when mass thinking and wants are formed by the system of globalization and the media.

There exists a social mythology that math and natural sciences will guarantee you all the competences. It clearly shows in a document such as „Latvia's membership in the European Union, aims, priorities and actions from 2007 to 2013" in chapter „Education and science development", where it is emphasized that natural sciences and math has a priority role in Latvia. This kind of setting works as a direct reflection of process of globalization – money attraction to a certain system of administration, only one education role and one administrative principle.

Value of education and value definitions defined by educational documents, affected by post-modern culture, are open, general and abstract, concentrated to acknowledgment of cultural inheritance, leaving the development of the individual's personality in the background.

Key words: value education, education, mass thinking, consumer society, globalization

Ievads

Visu kultūrlaikmetu spilgtākās idejas saglabājas un transformējas nākamajām paaudzēm. Šobrīd veidojas jauna sociālo attiecību, komunikācijas satura, sociālo aktivitāšu un savstarpējo zināšanu, pieredzes apmaiņas procesu pārstrukturizēšana. Šie procesi raksturīgi globālajai kultūras telpai.

Paradigmu maiņa globālajā kultūrtelpā, pasaules uzskata maiņa, postmateriālo vērtību nomaiņa uz materiālajām vērtībām vai arī to paritāte mainās līdz ar kultūras sociālpolitiskajiem, to starpā, patērētājsabiedrības nosacījumiem.

Izglītība ir viena no kultūras formām, kas mainās līdzi globalizācijas procesiem un tās visaptverošais saturs kalpo ne tikai sabiedrības izglītošanai, integrēšanai, sociālo tīklu paplašinājumam, bet arī kultūras atmiņas uzturēšanai un pārnesei, kas ir viena no būtiskākajām izglītības funkcijām. Un ne tikai izglītības saturs, bet „sociālo prasmju saturu nosaka arī attiecīgās sabiedrības tradīcijas un paradumi (Andersone, 2004.). Tāpēc īpaši nozīmīgs faktors vērtību adaptācijā ir socializācijas procesam, kurš norit zem patērētājkultūras zīmes.

Pētījuma metodes

Lai apzinātu skolas jauniešu vērtību prioritātes pētījumā izmantotas kvantitatīvās metodes – anketēšana un kontentanalīze, kā arī kvalitatīvās pētījumu metodes - fokusa grupu diskusijas un teoriju metode-teoriju analīze.

Rezultāti un diskusijas

Pētījuma ”Jauniešu vērtību izvēle process patērētājsabiedrībā” rezultāti uzrādīja jauniešu vērtību izvēles ciešo sasaisti ar sabiedrībā noritošajiem patērētājsabiedrības procesiem un ekonomiskās krīzes izraisītajām psiholoģiskajām sekām- nedrošību par nākotni un tādu prioritāri izvēlēto vērtību kā *nauda*, *karjeras* un *izglītības* lomu savas nākotnes eksistences nodrošinājumam. Diskusijas jautājums noskaidrot kā veidot līdzsvarotību starp vērtību prioritātēm, kas ir definētas vidusskolas mācību priekšmetu saturā un sasniedzamajos rezultātos un laikmetam raksturīgajām sabiedrības normētām vērtībām, kuras nespēj pilnībā nodrošināt jauniešu pašu izvirzītos vērtību kritērijus. Kāpēc radies pārrāvums starp izglītības faktisko saturu un sasniedzamo rezultātu?

Vērtības kā sociāla transmisija

Izglītības kvalitātes uzlabošana valstī ir ne mazāk svarīga zināšanu pārneses funkcija kā valsts konkurētspējas palielināšana globālajā ekonomikā. Vērtības kā socializācijas procesa transmisija starp indivīdu un sabiedrību, to apgūšana un reāla īstenošana izglītības telpā nodrošina katra indivīda socializācijas kvalitāti. „Socializācija ir jēdzieniska konstrukcija,teorētisku jautājumu un problēmu nostādņu kopums (..),varētu teikt tas ir modelis, kas tēlaini izsaka to, ko nevar attēlot uzskatāmā veidā (Hurrelman, 1986, 18). Ar vērtību izvēli jaunieši nosaka savu sociālās rīcības modeli, tās izvēloties un pieņemot kā savas, pakārtojot sev. Skolas programmās vērtībizglītība ir iekļauta kā viena no caurviju tēmām, kas paredz„ tikumiskas personības attīstību, kura balstās uz morālām vērtībām un sekmē spēju atbildīgi veidot attiecības ar citiem cilvēkiem, ģimeni tautu, valsti un sabiedrību kopumā. Vērtību izpausmes uzrādās sociālā rīcībā, kā to uzsver pedagoģijas un

izglītības profesors Herberts Gudjons, tomēr diskutabla ir nostādne, ka „procesi, kuri to rada, nav novērojami"(Gudjons 1998,166.).Lai socializēšanās notiktu tiek pētīta cilvēka izaugsmes „aktīvā forma"(Gudjons 1998, 167). Šo jēdzienu ieviesa franču sociologs E.Dirkerms1907.gadā ,lai raksturotu indivīda sabiedrības nosacījumu lomu cilvēka personības veidošanā.

Vērtību adaptācijai kā socializēšanās nosacījumam nav diverģences raksturs. Vienkāršojot var runāt par veidu ,par indivīda tapšanu par sabiedrības locekli. Un to var skatīt 3 perspektīvās:

1. cilvēka konfrontācija ar vidi – uzrādot cilvēku aktīvo lomu šai konfrontācijā;
2. uz institūcijām orientēta perspektīva – kādas funkcijas un mērķi ir sabiedriskām institūcijām;
3. uz kultūru orientēta perspektīva-kas vieno indivīdu ar kultūru, uzrādot kā šī kultūra tiek nodota tālāk.

Tāpēc lai sekmētu skolas vidē vērtību sasaisti ar skolas programmās, mācību priekšmetu standartos definēto ar reālo kultūrvidi, skolas vidē jāsekmē kultūrkompetenču attīstība. Bet, lai attīstītu kultūrkompetences kā izmērāmu un pārbaudāmu rezultatīvu prasmi, skaidri jāapzinās – ko mācīt gan saturiski, gan metodiski, gan saistībā ar kultūras tradīciju un sociālo vidi.

Globalizācija un vērtību pieņemšanas komponentes

Globalizācijas attīstība ir uzrādījusi nepieciešamību pēc noteiktām un visiem pieejamām vērtībām (Rudzīte,K., 27) savas būtības arī ir patērētājkultūras sastāvdaļa. Saskaņā ar sociologa R. Ingelharta *(Inglehart*) vērtību teoriju 20.gs. 2.pusē Rietumu civilizācija pakāpeniski notikušas vērtību maiņas. Notikusi pāreja no materiālajām (kas ietilpina arī drošības vērtības) uz postmateriālajām (dzīves kvalitātes nodrošinājuma)vērtībām, kas atbilst globālās patērētājsabiedrības vērtību uzstādījumam un dzīves modelim. (Inglherts 22, 161) Tādējādi var runāt par to, ka vērtību darbība vērsta uz cilvēku vēlmju mērķa apzināšanu, kļūdama par personības struktūras sastāvdaļu.

Humānpedagoģijas postulētais izglītības mērķis ir sevis pašrealizācija, nevis zināšanu apguve kā mērķis par sevi. Kā vēsta Dž. Djui *(Dewey)* teorijas – jaunas zināšanas indivīds var iegūt nevis balstoties uz vecām zināšanām, bet problēmsituācijā, kad rodas jaunas idejas, piemēram, krīzes ekonomiskā situācijā – kāda eksistē mūsu valstī pēdējos trīs gadus.

Veids kā globālā telpa nodrošina komunikāciju ar vērtībizglītojošiem mācību standartiem un saikni ar patērniecisko vidi, sākot ar tiešu valodisku saskarsmi un beidzot ar mediatizēto, plurālo globālās kultūras komunikatīvo dzīves telpu, kas savā ziņā ir normativizēta, tomēr negarantē garīgo vērtību prioritāti.

Tradicionāli vērtības apzināti tiek dalītas divās grupās – garīgās un materiālās vērtības, lai noteiktu to mērķi un raksturu. Garīgās vērtības formē cilvēka garīgo pamatu, bet to pārākā pakāpe - vispārcilvēciskās jeb klasiskās vērtības ir pamats visām vērtību sistēmām, kas veido kultūras un komunikācijas morāles pamatu un ir universālas. Dažādu paaudžu vērtību prioritāšu saskaņošana, piemēram, materiālisma vērtību maiņu uz postmateriālās vērtībām teorētiski uzrāda to, ka postmateriālās vērtības rodas no cilvēku augošām vajadzībām izcelt savas eksistences pamatu autonomiju, pašizteiksmi un dzīves kvalitāti. Šīs izmaiņas ir saistītas ar kultūras un cilvēku eksistences stāvokļu maiņu – mainoties sajūtām attiecībā uz vērtībām, aug tā vērtību kopa, kura cilvēkam liek mainīt domāšanu. Hipotēze par materiālo vērtību nozīmību tādi sociologi kā R. Inglherts saista ar nepietiekamības un trūkuma izjūtu, augstāko vērtību deficītu, kad virtuāli cilvēki tiecas pēc brīvības un neatkarības, cēlas rīcības, tomēr par prioritārām atzīst eksistences pamatvajadzības – uzturu un fizisko drošību, kuru indivīds saistīta ar izdzīvošanu. Ja šīs pamatvajadzības netiek nodrošinātas, tās ir nepietiekamas, tad sabiedrība šiem materiālistiskajiem mērķiem sāk piedēvēt galveno lomu. Šāda nostāja pārsvarā izpaužas postpadomju sabiedrībās. Bet veiksmes un materiālās nodrošinātības sabiedrībās cilvēki par prioritārām izvēlas postmateriālās vērtības, piemēram, iekļaušanos sabiedrībā ar tās noteiktām normām, augstu pašnovērtējumu, mākslinieciskās, estētiskās un intelektuālas baudas, kas pēc savas būtības arī ir patērētājkultūras sastāvdaļa ar vajadzību socializēties. Attiecības starp materiālo stāvokli, materiālajām vērtībām un garīgājām vērtībām netiek vienlaicīgi noregulētas. Kopumā ņemot, indivīda bāzes prioritātes attiecībā uz vērtībām socializācijas procesā atspoguļo tos pamatstāvokļus, kas dominēja bērnības un pusaugu gados, un šīs vērtības, galvenokārt, mainās caur starppaudžu populācijas aizvietošanu. (Inglehart,R. 1980).

Inglherts uzsver, ka cilvēki parasti adoptē tās vērtības, kas ir savienotas ar pieredzēto tā saucamajos izaugsmes gados. Jauniešu vērtības mainīsies šajos ‘’starppaaudžu stāvokļos’’ –vecumā no 16 - 18 gadiem, kas īpaši tos atšķir no iepriekšējo paaudžu domāšanas, uztveres un vērtību kodola attiecīgā jauniešu vecumā, tātad visa sabiedrība pakāpeniski mainīsies tad, kad pieņems un aizvietos esošas vērtības ar jaunām vērtībām, kas pakāpeniski sāk notikt vadoties no pētījumā iegūtajām atziņām un globālajai patērētāju kultūrai.

Sociālā mijiedarbība un vērtību pieņemšana

Globalizācija mācību procesā palīdz attīstīt sociokultūras kompetences, kuru veido četri galvenie komponenti:

- sociālā konteksta faktori- nosaka attieksmju un līdzekļu izvēli atbilstoši aktoru vecumam, dzimumam, sociālajai situācijai;
- vērtību atbilstības faktori – ietekmē indivīda darbību un dzīves stila elementus – morāli, tikuma robežas, nosacījumus, stratēģijas, mērķtiecības pakāpi;
- kultūras faktori – neverbālās komunikācijas īpatnības, ietver vispārēju izpratni un zināšanas par kultūras notikumiem,vēsturi, reģionālajām īpatnībām, tradīcijām un paražām;
- neverbālajā komunikācija- ietilpst ķermeņa valoda, acu kontakts, personīgās telpas izmantojums, pieskārieni, žesti, sasveicināšanās veidi, kuru pamats ir iepriekš minēti faktori un esošās kultūras normatīvs.

Šīs kompetences apguves vērtību komponentes ietilpst humanitāro mācību priekšmetu mācību saturā. Pētījums „Jauniešu vērtību izvēle patērētājsabiedrībā" uzrāda jauniešu vērtību prioritātes un nākotnes tendences, kopumā demonstrējot specifiskas sociālkultūras kompetenču apguves robežas.

Sociālā mijiedarbība vērtībuveidošanās procesā notiek ar vairāku sociālo aģentu starpniecību, mācību satura un dominējošās patērētājkultūras palīdzību.

Tabula Nr.1.

Pieredze	Pieredzes paraugi, nostādnes Zināšanas ,emocionālās struktūras Kognitīvās spējas
Mijiedarbība, sociālās attiecības	Attiecības starp skolēniem, skolotāju Attiecības starp vecākiem, bērniem Komunikācija starp draugiem, vienaudžiem
Institūcijas	Skolas, augstskolas, masu mēdiji, uzņēmumi Baznīca, armija
Visas sabiedrības struktūras	Komponenti: sociālā, ekonomiskā, politiskā struktūra

Tab. Nr.1. Indivīda vērtību pieņemšanas process caur socializēšanos. Pēc Tilmaņa. (Tilmann,1994,18)

Indivīda dzīves pieredzes apgūstamie elementi ne vienmēr kļūst par vērtību No pieredzes iegūtu faktu vērtība veidojas vienīgi refleksijas laikā. Tas ir uztvertā subjektīvas novērtēšanas process atkarībā no tā, kā skolēnu kā personību ietekmē. Tātad attieksmē uz kādu faktu, kurš nozīmīgs skolēna personības attīstībā nosaka tā vērtību. Mūsdienās patērniecība izslēdz citādo un

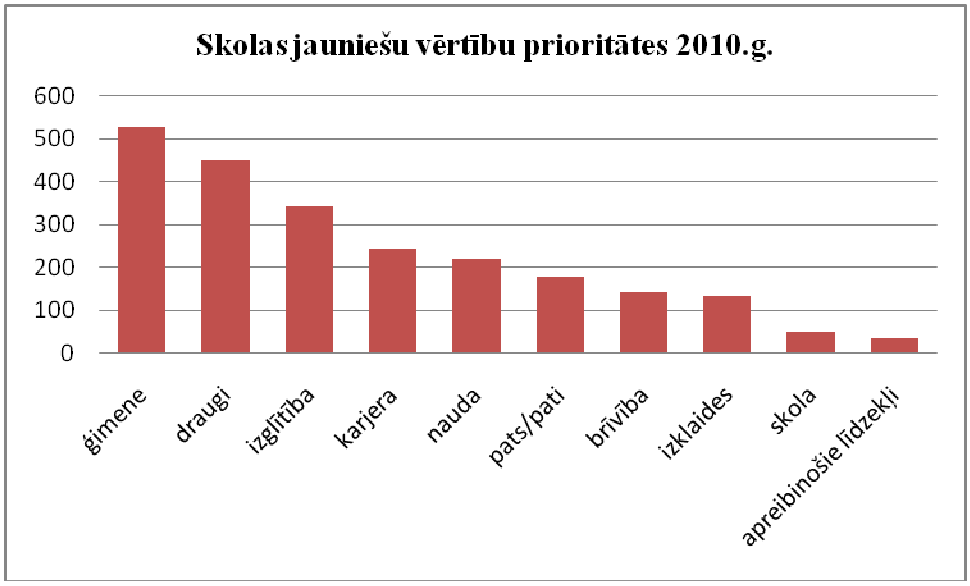
rosina domāt sabiedriski. Ikviena mācību priekšmeta satura apguve attīstīt skolēnā specifisku domāšanas veidu, kas saistīts ar ilgtermiņa domāšanu izglītībā, pie kam, saistīti starptautiskā izglītības sistēmā. Noņemot no sevis atbildību par vērtību izpratnes ekonomiski patērniecisko paplašināšanu, nemazinās patērniecības, pārfrazējot Ortegu i Gasetu, „nākšana pie apsolūtās varas."

Jauniešu vērtību prioritātes

Pētījumā respondentu ģenerālkopu veidoja 626 vispārējās vidējās izglītības jaunieši no visiem Latvijas reģioniem. Savos spriedumos skolēni orientējās pēc noteiktām kategorijām: „derīgi", „nederīgi", „labi", „slikti". Šīs kategorijas pašas par sevi nav saistošas, atsevišķi neeksistē. Tās vienmēr saistītas ar priekšmetiem un parādībām, apstākļiem – notikumu vai kultūras kontekstu.

Pētījuma rezultātā 243 respondenti no 626 par prioritāti izvēlējās vērtību „karjera", ko perlokutīvajā komunikatīvajā aspektā jaunieši fokusa grupās saistīja ar „labas dzīves nodrošinājumu". Pie kam,15% no šīs atlases grupas, vērtību „karjera" izvēlējās kā prioritāro vērtību, minot to 1.vietā. Veiksminieks, skolēnuprāt, ir tas, kurš spēj karjeru saistīt ar labu ,cilvēka cienīgu atalgojumu, nodrošināt savu ģimeni, būt brīvs un neatkarīgs.

Tabula Nr.2



Tab. Nr.2. Skolas jauniešu prioritārās vērtības. Austruma S.2010.gada pētījums

Jauniešu vērtības nav hierarhiskas un to izvēles motivācija ir ciešā sasaistē ar sabiedrībā definēto vērtību normatīvu. Tomēr daudzas no skolēnu vērtībām nav tieši empīriskas – akceptētas

kā personiskās pieredzes rezultāts. Rezultāti uzrāda, ka vērtības var mantot kā tradīciju turpinājumu, kā ieražu. Ka ”ģimene” kā vērtība eksistē kā postfiguratīvās kultūras tradīcijas pārmantošanas elements. Tradīciju percepcija raksturīga kultūras mantojuma uzturēšanā. Pētījumā „Jauniešu vērtību izvēle patērētājsabiedrībā” 526 no visas ģenerālkopas kā personīgi nozīmīgu vērtību pirmajā vietā izvēlējās vērtību „ģimene”, no visiem respondentiem 48% to uzrādīja kā 1.nozīmīgāko vērtību. Šī izvēle norāda uz vietējo tradīciju sociālo ievirzi. Bet vērtības karjera un nauda stādot augstāk par indivīda humānajām vērtībām ,atspoguļo laikmeta pārrāvumu. 2011.gada 7.jūnijā konferencē – diskusijā par Polijas un Latvijas mūsdienu jauniešu vērtībām ekonomikas un kultūras augstskolas rektora vietas izpildītāja Gunta Veismane savā runā uzsvēra, ka "patērētāju kults un dzīšanās pēc materiālās labklājības ir atstājis milzīgu iespaidu uz indivīdu garīgo izaugsmi. Vērtības tiek aizstātas ar ērtībām, kas ilgtermiņā cilvēcei neko labu nesola."

Tomēr skolēnu vērtību prioritātes uzrāda citu ainu. Starp fokusa grupās 20 aprobētajām vērtībām, 449 izvēlējās vērtību „ draugi” kā vienu no sešām prioritārām vērtībām, bet 22 no tiem vērtību draugi izvēlējušies 1.vietā kā galveno. Vērtība „draugi” kā otru nozīmīgāko vērtību nosauca - 107 ,bet kā trešo – 119 respondenti. Draugi kā vērtība uzrādās gan saistībā ar izklaidēm, gan saistībā ar atbilžu variantu ”cilvēks, kuram vienmēr var uzticēties”; 0,7% no respondentiem atbildes variantā ”cita atbilde” atzīmēja, ka „draugi viņiem aizstāj ģimeni” laikā, kad vecāki peļņas nolūkos devušies uz ārzemēm. Savdabīgs rādītājs parādās analizējot patērētājvērtību „ārējais izskats” saistībā ar „draugi”. Kur no visiem četriem reģioniem tieši Rīgas skolās ārējā izskata nozīmība tiek saistīta ar draugu vērtību, tātad skolēni vēlas pielīdzināties draugiem.

Secinājumi

1. Globalizācijas un ekonomiskās krīzes sekas uzrāda jauniešu vērtībizvēli saistībā ar personīgo drošību – draugi ir tie, kas spēj sniegt morālo atbalstu un nereti aizstāj ģimeni, bet tādas vērtības kā karjera un izglītība atbildēs parādās kā labas dzīves nodrošinājuma garants.
2. Globalizācijas tīklojums kultūras telpā – tirdzniecības, preču un finanšu plūsma, investīcijas un starpvalstu aizdevumu komercdarbība un konkurence skar un ietekmē visus sociālos procesus, sekmējot ne tikai kultūru integrāciju, bet arī izglītības standartizāciju, tomēr skolēnu izvēlētās vērtību prioritātes tikai daļēji atspoguļo skolas jauniešu standartizētus vērtību izvēles normatīvus.

3. Vidusskolēni nepieņem tās vērtības, kuras sabiedrībā nav reprezentablas un kurām viņu attiecīgajā vecuma posmā nav nozīmes. Vienpersonīgo vērtību pieņemšanā svarīgi ir gan ārējie, gan iekšējie faktori, kuri nemitīgi atrodas mijattiecībās.

Izmantoto literatūras avotu saraksts

1. Andersone, R. (2004). *Pusaudžu sociālo prasmju veidošanās.* Rīga: RaKa.
2. Bauman, Z.(1993) *Postmodern ethics*. Wiley-Blackwell. 110-138 pp.
3. Inglehart, R. (2000). *Globalization and Postmodern Values* .Cambridge: Cambridge University Press.
4. Hurrelman,K., Engel U.(Eds.) (1989) The social world of adolescents: International perspectives (18-26pp). Berlin: Walter de Gruyter.
5. Rudzīte. K.(2006) *Globalizācija. Globālās pārvērtības un globālā dienaskārtība*. Stratēģiskās analīzes komisija, Rīga: Zinātne.
6. Riley-Tillman T. C (2003) School Psychology Review. Volume 32, No. 1, 57-76 pp.
7. Meredith A.. Bak, (2005) New York University, (USA *Globalisation and Representation,* 3rd International Conference on Globalisation and Resistance, University of Brighton, UK, 12th-13th March, 2005
8. Trapeniece, I.(2009). *A portret of Latvian youth today: integration in society and marginalization risks*, Riga: LU akadēmiskais apgāds, 13-21 pp. (in Latvian)
9. Zimmels, G.(2000). *Nauda modernajā kultūrā. Nauda, dzīvesstils, identitāte,* Rīga: Latvijas universitātes zinātniskie raksti, 629. sējums,. Stepčenko, A. zinātn.red.
10. Konference-diskusija http://www.catholic.lv/main.php?parent=4048

SOCIAL CAPITAL AND LOCAL IDENTITY IN THE SOCIETY OF GLOBALIZATION

Alberto Bernini
Degree in Philosophy, University of Parma
Via Don Minzoni 15, 26041, Casalmaggiore (CR), Italy
Tel. Mobile: +39 3331847336, famber3@virgilio.it

Abstract – The analysis of the concept of *social capital*, theorized by Robert D. Putnam, emphasizes the crisis of the associative mutuality, that has been characterizing our society for forty years. The study of the associative mutuality shows that the social capital developed very fast during the first part of the 20th century, thanks to the social solidarity. Unfortunately the role of the social capital has reduced his importance in the last decades and at the same time society has got into a period of crisis, involving not only economy, but also (and above all) behaviors. Through the study of the structure and the organization of the civil associations we can see that the origin of the local autonomy is basic for the creation of the *urban democracy*; in this regard, I would mention the association *Monumenta* (founded in Parma in 2004), and its care in protecting the artistic heritage of the city. In the last few years some scholars have focused on the relationship between the central state and the local institutions, because it concerns important fields such as economy, health, public administration, school and university; the social capital is basic for the development of this relationship, since it connects business, university and local administration. We can instance the University of Umeå, which has shown the fact that the *local governance* can improve the development of a region, and at the same time the vocational education of students and teachers.
Key Words – Social Capital, Free Association, Urban Democracy, Local Governance

Introduction

With the expression *social capital* we mean the social networks (to be understood in a sociological sense) among citizens, founded on confidence and mutual solidarity: starting from the Anglo-Saxon world this concept has spread in other parts of Europe since the '70th, a period characterized by slow decadence (not only in economy) and social uncertainty. The importance of the *social capital* increased in the last decades, because the defence of local identities is considered basic in the globalized society, and it is carried out thanks to the collaboration among the individuals, who organize in free associations, in which every member takes part voluntarily to a project originating from the necessities of a community. The field of action of these associations is various and goes from the preservation of the local culture to the interests of groups of persons, in order to make universities, schools and the economic world interact each others: this fact leads the state institutions to reduce the bureaucratic aspects and to pay more attention to the concrete citizens' necessities.

Research Methods

This contribution is based upon a selected bibliography referring to various topics: place, identity, globalization, social capital, urban democracy and free association. The books and the articles considered were published above all in Anglo-Saxon reviews (where the local deliberative

democracy is the hub of civil society); but there are also articles published by the University of Umeå, and in relation to the association *Monumenta* the sources have been taken from official documents of the Italian public administration and from the association itself.

Results and Discussion

The topic of the *social capital* was first theorized by Robert D. Putnam[16], who dwelt upon analyzing the crisis that has been affecting society since the '70, a period when evident proofs of a worrying process of social disaggregation revealed themselves. Putnam considers the social capital «the basis of the social structures of a community, founded on mutual solidarity and confidence» (Putnam, 2000, pp. 20-21), and asserts that social capital originated, above all in Northern Italy, during the Middle Ages, when people freed from the imperial power by reuniting in free association to protect their affairs and to make a network of solidarity: the *communes.* In particular «he found that the same north-central Italian regions that sustained cooperatives and choral societies also provided the most support for mutual aid societies and mass parties and that citizens in those same regions were the most eager to make use of their newly granted electoral rights. In the South, in contrast, apathy and ancient vertical bonds of favouritism restrained civic involvement and inhibited voluntary, horizontally organized manifestations of social solidarity» (Tarrow, 1996, p. 393). In this context the origin of social cohesion becomes an aggregation instrument of the members of a community, that establishes the foundations for the institution of a solid politic culture to whom the social actors refer in order to make stable relations with other citizens. The concept of politic culture assumes the characteristic of a civil virtue, of devotion to moral principles, shared by all the people, that determines the evolution of social capital inside a community. In addition, it underlines the degree of development of the society in the economic, institutional end ethic fields. Through the social aggregation the members of a community keep entire the social capital, composed of specific characteristics, such as networks, rules and confidence, that facilitate the collaboration among all the parts involved. Precisely the social capital makes reference to the bonds between persons, characterizes by a strong feeling of confidence, that afterwards generates the civil engagement of citizens.[17] An important role in the constitution and

[16] Robert D. Putnam (09/01/1941, Rochester, NY) is a sociologist and Professor of Public Policy at Harvard University, he is also Visiting Professor at University of Manchester.

[17] S. Szreter, (2002), p. 574: «Generalized reciprocity is defined as widespread and transitive trust and trustworthiness among the members of a large social group, comprising many overlapping networks involving large numbers of individuals most of whom will be strangers, in the sense they have no prior personal acquaintance with each other when

preservation of a solid social capital is held by women, who, thanks to their constant engagement, contribute to projects of voluntary service through free duty. At the same way people see that the free association and the networks of neighbourhood protect those groups of persons that are marginalized from the society (Sabetti, 2006, p. 195). The social capital is both a reason and a consequence of confidence in comparison with the institution, and the development of these associations show the degree of evolution of a state. Unfortunately the loss of centrality of the single person and the society of consumers' goods have produced a sort of disaggregation inside the society, and the individualism has taken precedence over the good of the community; a great attention is given to the importance of preserving firm social conventions, especially «they involve mutual obligations and sustain rules of conduct, fostering norms of reciprocity, because connections are typically part of a network in everyday life» (Szreter, 2002, p. 574). It means that the interpersonal bonds are strong if the community preserves the social capital, and if the local autonomy is set apart from political administration. The concept of social capital characterizes the difference between the independent association and the state or the political corporation (Woolcock, 1998, pp. 161-182), in other words it's equivalent to the distinction between the state and the civil society. In this way the culture of a local community is preserved: this feature emerges in the fact that induce a group of persons to acknowledge themselves in a determinate social context and to institute a firm bond between individual culture and collective organization: this binomial is able to guarantee a constant preservation of the historical and cultural heritage (Bernini, 2009, p. 17). Putnam thinks that *trust* is basic for establishing the civic culture (Sabetti, 2006, p. 188), and particularly it has been underlined that during the centuries the social actors have made subtle fiduciary networks for the creation of bonds, aiming at realizing forms of economic and social organizations, fundamental for the urban democracy.

The first example I would mention is the association *Monumenta* of Parma, that since its foundation (2004) operates for the defence of the artistic and monumental patrimony of Parma (Bernini, 2009, p. 16). Up to now it has committed itself in opposing to the construction of a building connected to the Parma underground, in protecting "Piazza della Ghiaia"[18], and in

---

they interact. Putnam tellingly conveys the virtues of generalized reciprocity by comparing it to the advantages that the money has over barter».

[18] "Piazza della Ghiaia" is a square of Parma placed near the river Parma, whose name derives from a gravelly shoal caused by a flood. In the 13th century it became an area devoted to public executions and fairs, and in 1509 the public shambles was built, that favored the birth of an important market till today.

preserving "Ospedale Vecchio"[19]. In these situations its action has been supported by all the members[20], led by the president, a real *civic leader* and a moral guide, who has coordinated the action of the association. The most important result is the recognition received by the "Tribunale Amministrativo Regionale dell'Emilia-Romagna"[21], that decreed (sentence law n. 618 dating to 04/12/2007) that the associations like *Monumenta* are entitled to act when these requirements are satisfied:

- a continuative and no occasional action,
- an adequate degree of representation and stability,
- a defined area of territorial presence,
- an objective,
- an activity developed in conventions and cultural initiatives.

So we can infer that the free association are basic to develop the *urban democracy*, or rather the opportunity to preserve the social tissue of a city. The associations like *Monumenta* guarantee the possibility to keep civic organizations independent from the politic power, and they develop a strong civic sense, characterized by the confidence of its members among them and institutions. This confidencial relationship is basic to institute a valid and lasting model of civilization, in which the role of *civic leader* emerges; this figure is fundamental to understand the importance of the civic culture of a country, since it represents a model of reference for the whole community. The politic doctrine sees in the will of the citizens of taking part to the civic life the origin of the politic community, that encourages the self-realization and develops bonds of mutual solidarity (Pocock, 1971, p. 85). The *civic leader* assumes the features of moral leadership for the community as example of rectitude and correctness, whose teachings are an incentive for improving the action of the public administration, these teachings act as instruments of networks between the state and the citizens. The functions of the *civic leader* can be summarized in this way: he encourages the civic independence, governs with persuasion, avoids the corruption of the power, and is a good civic example for the people (Hart and Grant, 1989, p. 103).

The development of free associations implies also the possibility to create social capital through a network between local institutions (regions and communes) and institutes put at the head

[19] The old building named "Ospedale Vecchio" (Old Hospital) rises on a tenement house used since 1202 by Rodolfo Tanzi for the shelter of needy persons. During the centuries it has enlarged and has become a sort of hospital: it gave up the hospital functions in 1926.

[20] The members belong to different social classes, for example there are lawyers, professors, housewives, architects, students, pensioners and workers. They are all independent from politic parties.

[21] The Regional Administrative Court of Emilia-Romagna.

of citizens' professional formation (schools and universities). An example is the University of Umeå, that since 1965 has been collaborating with the local corporations (Westlund, 2004); in 2003 it elaborated the plain of joint working with other Swedish universities and with the local communities, focusing on the possibility of economic, social and cultural development in a territory, through the training of a highly qualified staff (Umeå Universitet, 2004). The University of Umeå since 2003 has undertaken an active cooperation with local corporation that has contributed to the fusion between *Univex* (set of independent organizations) and *Uminova Centre* (centre of economic development), to institute in 2004 the *Samverkanshus* (group of cooperation). Afterwards the new direction has decided to emerge all the business activities into a single company, named *Uminova Innovation AB,* in order to achieve these objectives (Hudson, 2006, p. 387):

- economic development,
- scientific progress,
- formation of specialized staff.

More precisely, one can consider the network between Umeå University and the other politic and business subjects as a free association, voluntary and independent, but always respectful of the state's rules. This collaboration has generated a situation in which people see on one hand the birth of voluntary associations, on the other their constitution is the signal of a healthy democracy (Fox, 1996). The freedom to decide the teachers' competence on the ground of the necessities of the university means found the network on the confidence, so that the independent research is facilitated and the researches are more free (Leighley, 1995). This project was thought to achieve a double aim by 2010: a greater link between the universities and the local administration and the constant presence of the academies on the international stage (Umeå Universitet, 2003). The region of Västerbotten (in the north of Sweden) approved a series of rules in order to create a profitable interaction between the universities and the local administration (Avtalsåret, 2002) and to favour the public and private investments; it succeeded in establishing a network able to support the development of the region not only in the fields of infrastructures and the business, but also in the fields of expertise, agriculture and nature. In this way it's established a series of bonds that generate a case of *local governance,* a free and independent network founded on the decentralization of the powers and on the partnership between local administration, firms and universities, in which the hierarchical vision of the centralized state fails. The importance of this new approach to the academies by both the public administration and other private firms favours a strong network of the social actors to support the development of social capital. This is the basis of any democracy

(Paxton, 2002, p. 255) and any free society in which the man is considered as a person and not as a simple maker of goods.

Conclusions

To conclude: what's the origin of social capital?

The study on the *social capital* underlines the importance of the networks of mutual solidarity, that favour the preservation of civic web. In particular, the analysis of free associations has shown a special point of view of the society, in fact the origin of the local deliberative democracy goes back to the medieval period, when, above all in Northern Italy, the *communes* originated. They had inherent in their identity the peculiarity of free associations, that is on the basis of the links of mutual solidarity and reciprocal assistance. It's noticeable that these relationships make collaborations also with schools, universities, and firms, to develop the social capital of a community, regardless of the centralistic power of the state. In a period when the homologation has gained the upper hand in society it's important to recognize to the local communities the possibility to protect the cultural, social, economic and historical heritage, that characterizes the local identity and makes them unique and special.

References

1. Avtalsåret, (2002). Länsstyrelsen i Västerbottens län (County Administrative Board for Västerbotten region), 2002.
2. Bernini, A. (2009). *Un esempio di democrazia urbana: l'associazione Monumenta di Parma*, Napoli, Scriptaweb, 2009.
3. Fox, J. (1996). How Does Civil Society Thicken? The Political Construction of Social Capital in Rural Mexico. In *World Development*, vol. 24, pp. 1089-103, 1996.
4. Hart, D. and Grant N. (1989). A Partnership in Virtue among All Citizens: The Public Service and Civic Humanism. In *Public Administration Review*, vol. 49, n. 2, Mar. – Apr. 1989.
5. Hudson, C. (2006). *Regional Development Partnership in Sweden: A Way for Higher Education Institutions to Develop Their Role in the Processes of Regional Governance?,* Higher Education, vol. 51, n. 3, Apr. 2006.
6. Leighly, J. (1995). Attitudes, Opportunities, and Incentives: A Field Essay on Political Partecipation, In *Political Research Quarterly*, vol. 48, pp. 181-209, 1995.
7. Paxton, P. (2002). Social Capital and Democracy: An Interdipendent Relationship. In *American Sociological Review*, vol. 67, n. 2, Apr. 2002.
8. Pocock, J.G.A. (1971). "Civic Humanism and Its Role in Anglo-American Thought", in *Politics, Language and Time*, New York, Atheneum, 1971.
9. Putnam, R. (2000). *Bowling Alone. The Collapse and Revival of American Community*, New York, Simon and Schuster, pp. 20-21, 2000.
10. Szreter, S. (2002). The State of Social Capital: Bringing Back in Power, Politics and History. In *Theory and Society*, n. 5, Oct. 2002.
11. Tarrow, S. (1996). *The American Political Science Review,* vol. 90, n. 2, Jun. 1996.
12. Umeå Universitet (2003). *Umeå Universitet 2010, önskade bilder om framtiden, (Desired pictures of the future)* underlag till visionsdagarna, 2003.

13. Umeå Universitet (2004). *årsedovisning 2003 (annual report)*, 2004.
14. Westlund, H. (2004). Regionala effecter av högre utbildning, högskolor och universitet, En kunskapsöversikt, (Regional effects of higher education), 2004.
15. Woolcock, S. (1998). *Social Capital and Economic Development. Toward a Theoretical Synthesis and Policy Framework.* In *Theory and Society*, n. 2, 1998.

ETNISKĀS IDENTITĀTES VEIDOŠANAS ASPEKTI MULTIETNISKĀ VIDĒ

ETHNIC IDENTITY FORMATION ASPECTS IN MULTI-ETHNIC ENVIRONMENT

Larisa Brokāne, Dr.Psych., LLU docente.
LLU Lielā ielā 2, SZF, Socioloģijas katedra
Larisa.Brokane@llu.lv, t.63005627

Abstract. The formation of ethnic identity from the point of view of specific conditions of groups in the multi-ethnical country such as Latvia is determined by the condition of historically established interaction among communities with their cultural, political or religious identity.
The expression of ethnicity in the given context is considered by the authors as the uncertainty of priorities in the perception of dominating frames of socio-political and socio-cultural system by different ethnic groups and the preservation of culture, including political and religious culture. The formation of ethnic identity is determined by various criteria typical of an ethnic group:

- ethnic self-identification
- personal territory
- historical traditions
- specific culture heritage and mental culture including language and religion
- certain stable stereotypes of behaviour
- awareness of the mentality of other members of an ethnic group.

The author will focus on ethnic self-identity and explore the aspects of those formations in multi-ethnic environment. Ethnic identity formation problem will be viewed from two perspectives. The first will be characterized by personal identity with ethnic groups and second-the group's ethnic identity.
Key words: ethnicity, ethnical identity, multiethnic environment.

Ievads

Etniskās identitātes veidošanas problemātika tiks skatīta no diviem aspektiem. Pirmais aspekts raksturos personības identitāti ar etnisko grupu un otrais – grupas etnisko identitāti. Konceptuāli raksturojot etnisko identitāti var izdalīt šādus apzināšanas līmeņus: pirmais līmenis – elementārā grupas piederības apzināšanās, kas nosaukta par „empātisku identitāti"(*empation identification*), otrais līmenis – ideoloģijas veidošana (*ideology formation*), kas saistīts ar grupas izcelsmi, tās kultūras un vēsturisko mantojumu - uz tās pamata notiek hierarhiskā grupas identifikācija; un pēdējais līmenis ir priekšstatu veidošana par reālajām iespējām (*conception of means)*(Phinney J.S., Horenszyk G., Liebkind K.,Vegger P., 2001). Autors pievērsīs uzmanību etniskās identitātes jautājumam un skaidros tās veidošanas aspektus multietniskā vidē.

Identitāte un identifikācija

Terminu „etniska identifikācija" pieņemts skaidrot kā sociālo procesu un "etnisko identitāte" kā šī procesa rezultātu. Autors izmantos rakstā šos jēdzienus tieši šādā kontekstā.

Identitāte ir tēma, kura strauji reaģē uz pārmaiņām valstī un pasaulē, jo tā ieņem vadošo pozīciju raksturojot sabiedrību kā identitāšu mainīgo kopību. Par identitātes jautājumiem daudz rakstīts, tiek analizēti dažādi identitātes aspekti. Identitātes jēdziens ir kļuvis par „modernu vārdu", kuru izmanto saistībā ar etniskajām un nacionālajām parādībām. (Vēbers E., 1995)

Pirmo reizi jēdzienu „identifikācija" 1914.gadā formulēja. Z. Freids *(Sigmund Freud)* savā grāmatā „Grupu psiholoģija un Ego psihoanalīze" un raksturoja to kā bērna neapzinātu emocionālo saikni ar vecākiem, kā indivīda un grupas savstarpējās mijiedarbības mehānismu. (Freids Z. 1997)

Ē. Ēriksons *(Erik Erikson)* izstrādāja psihosociālās identitātes koncepciju, kas mūsdienās tiek izmantota, lai skaidrotu sociālo identitāti kā fenomenu. Ē.Ēriksons uzskatīja, ka tikai daļa identitātes ir apzināta, daļa atrodas priekšapziņā un lielākā daļa ir neapzināta un tiek izstumta. Psihosociālā identitāte, pēc zinātnieka domām, ir sabiedrības un personības mijiedarbības rezultāts.

Ē. Ēriksons savā darbā „Identitātes jēdziens starprases mijiedarbībā" noformulēja negatīvās identitātes koncepciju, izdalot trīs pamatprincipus:

1. Katra cilvēka psiholoģiskā identitāte satur hierarhiski organizētus pozitīvus un negatīvus elementus. Bērnībā cilvēks sastopas ne tikai ar ideālajiem, bet arī ar ļaunajiem prototipiem. Tādejādi viņš iegūst priekšstatus - kādam viņam nav jākļūst. Pozitīvā identitāte atrodas konfliktā ar negatīvo identitāti.
2. Cilvēkam, kas pieder mazākuma grupai, tiek sajaukta paša negatīvā identitāte ar dominējošās grupas priekšstatiem par mazākuma grupas negatīvo tēlu, rezultātā veidojas nepilnības komplekss un sevis nicināšana.
3. Dominējošā grupa ir ieinteresēta mazākuma grupas negatīvajā identitātē, jo tā aizsargā dominējošo grupu pret pašas negatīvās identitātes apzināšanu. Tas ļauj dominējošajai grupai sajust savu pārākumu un kopību (Erikson E.H.,1976).

20.gs. 90. gadu vidū identitātes jēdzienā tika ieviestas izmaiņas, papildinot to ar skaidrojumu, ka tā ir " konstruēšanas un nemitīgu pārmaiņu process" . Tieši šajā laikposmā tiek izstrādātas dažādas koncepcijas par identitātes veidošanās principiem. Tā 1993. gadā tika publicēta G. Breakwella *(Glynis Breakwell)* kognitīvās psiholoģijas koncepcija, kas skaidro indivīda piederību sociālajai grupai, kā sociālo kategoriju, kura atkarīga no indivīda personiskajām īpašībām.

G. Breakwells sociālo identitāti apskata kā dinamisku procesu un noteica šādu *identitātes struktūru*, kas sastāv no:

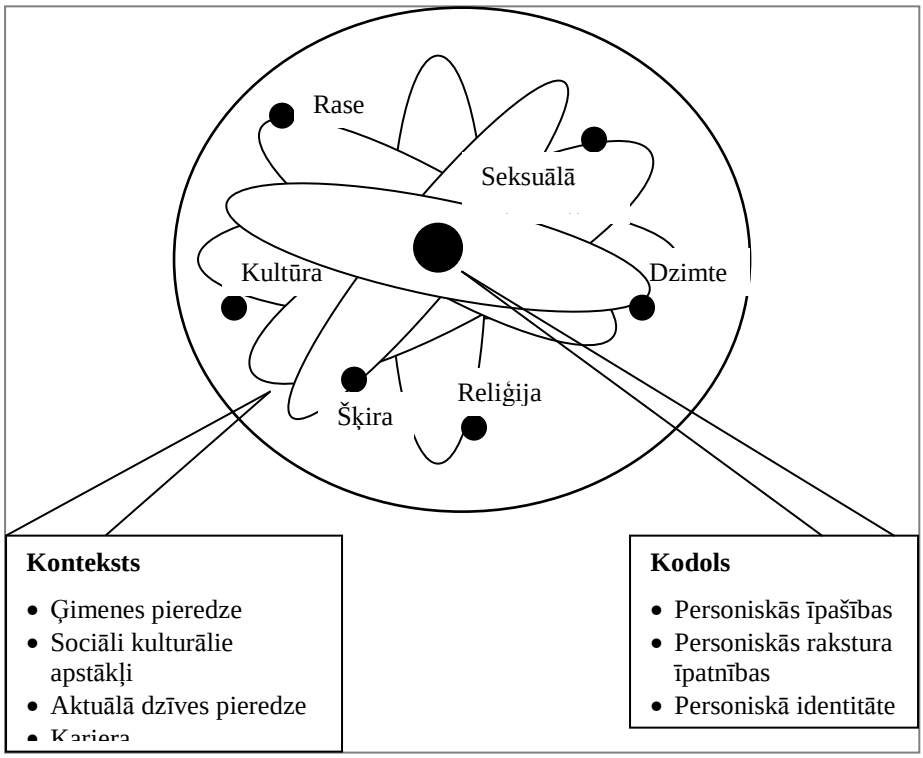
1. *asimilācijas procesa*, kad notiek dažādu sociālo kategoriju (vērtību, uzvedības stilu u.c.) apzināšana un to salīdzināšana ar saviem priekšstatiem;

2. *novērtēšanas process*, kas saistīts ar sociālo kategoriju nozīmes noteikšanu.

Šie procesi norāda uz identitātes dinamismu, kas savukārt, balstās uz četriem pamatprincipiem:

1. *pašcieņas princips* – pašapziņas attīstība, informācijas selektīvā uztvere virzīta uz pašcieņas saglabāšanu;
2. *nepārtrauktības princips* – personības attīstība virzīta uz pašidentitātes veidošanu;
3. *atšķirtspējas princips* – sevis salīdzināšana ar citiem, savas unikalitātes apzināšana;
4. *efektivitātes princips* – individualitātes saglabāšana, kas atkarīga no situācijas un personības psiholoģiskajām īpatnībām.(Breakwell G.M.1993).

Katra indivīda apziņā veidojas vairākas identitātes, kas atspoguļojas daudzlīmeņu identitāšu modelī,kur tiek parādīta gan identitāšu struktūra, gan veidošanas principi (Sk. att.1).



1.att. Daudzlīmeņu identitāšu modelis (Avots: Abes E.S., Jones S.R.,2004)

Daudzlīmeņu identitāšu modelī iekļauti tādi elementi kā rase, dzimte, seksuālā orientācija, reliģiskā piederība, piederība kādai kultūrai un šķirai. Identitāšu līmeņi parādīti kā apļu pārklājumi, jo pēc autoru domām, neviena no identitātēm netiek skatīta atsevišķi. Modeļa centrā atrodas kodols „Es" – personiskā identitāte un ietekmes aģenti (ģimene, karjera un sociāli kulturālie apstākļi u.c.), kas nosaka identitāšu satura izmaiņas un saistīti ar indivīda pašapziņu.

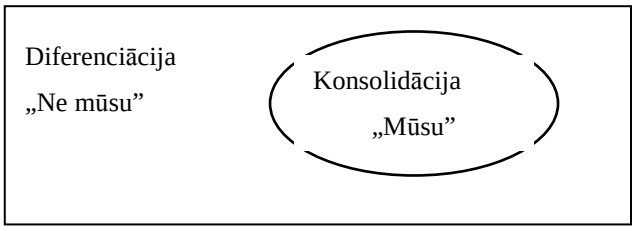
Etnicitāte un etniskā identitāte

Diskusijas par etnicitātes skaidrojumu aizsākās 20.gs. 70. gados, un tas bija saistīts ar etnopolitiskajiem notikumiem pasaulē. Lai skaidrotu jēdzienu „ *etnicitāte”* ir nepieciešams raksturot tādas kategorijas kā „etnoss” un „nācija”. Teorētiskā diskursa rezultātā izveidojās divi teorētiskie virzieni – primordiālims un konstruktīvisms. Tieši Entonijs Gidenss (*Anthony Giddens*) ir primordiālima spilgtākais pārstāvis, kas raksturoja „etnosu” kā cilvēku kopību, kam ir vārds, mīti par senčiem, kopīga kultūra un vēsture, kuri asociējās ar specifisku teritoriju un kam piemīt solidaritāte. Jēdziena *„etniskums”* skaidrojums saistīts ar pašidentitāti, kas ir etniskās identitātes pamats, kas balstās uz etniskās diferenciācijas procesu. Talkota Pārsona *(Talcott Parsons)* skatījumā ar „etniskumu” jāsaprot ”pirmkārt, grupas identitāti, t.i. vairāku cilvēku organizēšanu grupās un, otrkārt, solidaritāti un individuālo dalību grupās” (Соболева Н.С., 2008)

20.gadsimta 70.-80. gados zinātniskā pasaule pievērsa uzmanību jēdzienam „nacionālā pašapziņa” (etnonacionalitātes kontekstā) un tā struktūrai. Nacionālo pašapziņu skaidro kā kopienas piederības fenomenu, un tieši Juliāns Bromlejs (Юлиан Бромлей) ievieš šo terminu un norāda uz tā saikni ar etnisko un nacionālo pašapziņu situācijā, kad cilvēks nosaka savu piederību tautai, un plašākā nozīmē tā ir nacionalitātes apzināšana, - priekšstati par to, kas ir valoda, kultūra, teritorija, valstiskums.

Pētot etniskumu tika izdalīti elementi, kas pēc J. Bromleja domām, iekļaujas personības priekšstatos par savu etnisko un nacionālo (nacionalitātes kontekstā) grupu. Starppersonu mijatiecību rezultātā, kontaktējoties ar „savējiem” cilvēks uztver savas etniskās grupas pārstāvju ārējo izskatu, dzimtās valodas fonētiku u.c. pazīmes, salīdzinot ar „citiem” veidojas etniskās diferenciācijas „marķieri”, un tas tiek raksturots kā etniskā konsolidācija (Бромлей Ю.В., 2009).

Katrai etniskajai grupai ir raksturīga *pašidentifikācija* un *pašapzināšanās*, tas padara grupas par atšķirīgām. Šī „atšķirība” (diferenciācija) veidojas grupas pašapziņā, kas veido robežu starp ”mūsu” un „ne mūsu” (Sk.2.att.).



2. att. Etniskas grupas pašidentifikācijas un pašapzināšanas modelis (Avots: Ю. В. Бромлей, 2009)

Konstruktīvisma pārstāvji Ernests Gilners (*Ernest Gillner*) , Benedikts Andersons (*Benedict Anderson*) un Ēriks Hobsbaums *(Eric J. Hobsbawm) „etnicitāti*" raksturoja kā intelektuāli veidotu konstruktu.

E.Gillners ir pazīstams kā „nācijas" un „nacionālisma" universālās koncepcijas pamatlicējs. Savus priekšstatus par etnicitātes problēmu viņš skaidro ar nacionālisma politikas palīdzību. Zinātnieka interešu lokā ir industriālās sabiedrības nācijas, kas etnicitātes fenomenu novirza uz otro plānu un vairāk piesaista uzmanību konstruktam „nācija – pilsonība". Skaidrojot jēdzienu "nācija" E. Gillners raksta, ka „šis fenomens eksistē tikai industriāli attīstītā sabiedrībā, un tas ir nacionālisma produkts , jo tā ir ideoloģija, kas veidota uz valstiskuma principa, kurš pieprasa, lai politiskās un etniskās robežas sakrīt un pārvaldības vairākums piederētu vienam etnosam". (Gellner E.,1983)

E.Gilnera skatījumā *„nāciju"* raksturo divi aspekti. Pirmais, ja cilvēki pieder vienai nācijai, tad viņus vieno kopīga kultūra kā ideju, zīmju un normatīvās uzvedības un saskarsmes sistēma; un otrais, kad cilvēki pieder vienai nācijai un atzīst savu nacionālo piederību. Tātad, nācijas veido cilvēki, jo nācijas ir cilvēku pārliecību, tieksmju un paradumu produkts. Cilvēku grupa kļūst par nāciju, ja šīs grupas locekļi atzīst vienotas tiesības un pienākumus attiecībā cits pret citu. Tieši šī atziņa viņus apvieno un padara par nāciju, visas citas kopīgas īpašības atšķir viņus no citiem.

Ernesta Gilnera *etniskās kopienas* skaidrojums balstīts uz etnokultūru diferenciāciju un atšķirīgiem priekšstatiem par etnokultūrām; *etnoss* tiek skaidrots kā intelektuālās elites (zinātnieku, rakstnieku, mākslinieku u.c.) konstrukts. Konstrukts *„etnicitāte"* uz etnosa potenciālajiem pārstāvjiem translējās ar dažādus masu saziņas līdzekļu (grāmatas, kino, izstādes u. Tml.) palīdzību. (Gellner E. 1983)

Benedikts Andersons „nāciju" uzskata par "īpaša veida kultūras artefaktu". Lai to izprastu, ir nepieciešams skatīties vēsturiska laikmeta pārmaiņās. Artefakti tiek skatīti kā modeļi, kas transformējas atbilstoši dažādiem sociālajiem kontekstiem, saplūstot ar politiskajiem un ideoloģiskajiem faktoriem. Andersons raksturo nāciju šādi: „nācija ir iztēlotā suverēnā politiskā kopiena, bet ar ierobežojumiem. Nācija ir suverēna, jo tai piemīt tāda kategorija kā suverenitāte" (Anderson B.,1991).

Ēriks Hobsbaums (*Eric Hobsbawn*) savā grāmatā „Nācijas un nacionālisms kopš 1780. gada" raksturo politisko nacionālismu un secina, ka nacionālisms ir Jauno laiku parādība. Viņš apgalvo, ka nācijas robežas mainās, jo to veido ne tikai politiskie, bet arī ekonomiskie aspekti. Nacionālisms pēc Ē. Hobsbauma ir „nacionālās jūtas un kustība, kā arī valdošās elites valstiskā rīcība" (Hobsbawn E., 1983). Pēc Ērika Hobsbauma teiktā „*etniskums*" ir reāls grupu identitātes

izpausmes veids, kas sasaista grupas dalībniekus pēc principa „mēs" un „citi", un šīs skaidrojums ir raksturīgs minoritārām etnogrupām (Hobsbawn E.,Ranger T.(eds) 1983).

Norvēģu antropologs Frederiks Bārts (*Fredrik Barth) etnosa robežu* problemātiku skaidro ar etniskās diferenciācijas palīdzību, uzskatot, ka tā saglabājas, neskatoties uz starpetnisku kontaktu palielināšanos. Etniskā diferenciācija saglabājās arī tad, ja cilvēks dzīves laikā maina savas sociālās vai etniskās grupas. Etnosa nozīmīgumu un noturīgumu nosaka tāds fakts, ka daudzas sociālās attiecības izjūt pretestību tikai pēc etnisko robežu uzstādīšanas. Bārts uzskata, ka „etniskās robežas virza sociālo dzīvi, un tās nosaka grupas uzvedības organizāciju un sociālās attiecības". Zinātnieks apgalvo, ka *etniskās grupas* pastāvēšana saistīta ar grupas robežu noteikšanu, „kultūras iezīmes nosaka šīs robežas, tās var mainīties, transformēties, taču grupas un organizācijas ir nemainīgas, „ārējais" ļauj noteikt etnisko kopienu un izpētīt tās kultūras formas un saturu". F. Bārts uzskata, ka etnoss atrodas vienotā sociālajā sistēmā, viņš saka, ka „etnosu mijiedarbība sociālajā sistēmā nav iemesls etniskas diferenciācijas likvidācijai, tas notiek pārmaiņu un akulturācijas gadījumā, jo kultūru atšķirības var saglabāties neskatoties uz starpetniskiem kontaktiem un to ietekmi"(Barth F., 2000).

Etniskās identitātes veidošana multietniskā vidē

20.gadsimta 80. - 90.gadu pētījumi saistīti ar etniskās identitātes saglabāšanu un etniskās identitātes pašapzināšanas tendencēm. Šajā laikā būtiski mainās etnicitātes izpratne un saturs (normas, etnocentrisms, etnodominēšana, etnofanātisms, etnonihilisms, ambivalence u.c.) sociālajā telpā (Национально-гражданские идентичности, под ред. Л.Дробижевой, Е.Головаха., 2007).

Cilvēka mūžā ir divi nozīmīgākie posmi, kas saistās ar kultūras apzināšanu un etniskās identitātes veidošanu. Pirmais posms – bērnība, raksturojas ar bērna ierobežotu izvēli kultūras apzināšanā un sevis identificēšanu ar kādu grupu un bērna pilnīgo atkarību no ģimenes. Šajā posmā liela nozīme ir tam, kādā vidē (monokulturālā vai multikulturālā) dzīvo bērns. Monokulturālajā vidē bērns automātiski un bez problēmām apgūst savas etniskās grupas kultūras un tradīciju pamatus. Etnoidentitātes veidošana ģimenē multietniskā vidē ir daudz sarežģītāka un saistīta ar krīzes pārdzīvojumiem un konfliktiem kā intraindividuālajā, tā arī interindividuālajā līmenī.

Etniskā identitāte sociālajā psiholoģijā tiek raksturota kā personības socializācijas process, kā piederības apzināšana konkrētai etniskai grupai. Etnoidentitātes veidošana ģimenē socializācijas rezultātā notiek divos paralēlos virzienos: pirmais, kā mērķtiecīgas audzināšanas un sociālās iemācīšanas procesa rezultāts, veidojot personības attīstības modeli un formu. Otrais - kultūras

apgūšana, kas notiek pieaugušo vecumā un saistīta ar etniskās identitātes transformāciju un saglabāšanu (Phinney J.S.,HorenszykG.,Liebkind K.,Vegger P.,2001)

Entonijs Koens *(Antony Cohen)* domā, ka "*etniskums*" ir sociāli kulturālo grupu mijiedarbības forma un skaidro identitāti izmantojot „etniskās minoritātes" un „etniskās majoritātes" kategorijas. Zinātnieks uzskata, ka *etniskā grupa* ir pašu cilvēku veidojums, kam ir kopīgas tradīciju paradigmas, reliģiskā piederība, valoda, vienota vēstures izpratne, kopīgi priekšstati par senčiem un vēsturisko dzimteni (Cohen A. P. 2000).

Kanādas psihologs DžeimsMarsia *(James Marsia)* uzskata, ka etniskās identitātes attīstības veidošanā ir četras stadijas, kuru secība var mainīties atkarībā no konkrētās dzīves situācijas:

1. *Izplūdusī identitāte* – etnicitātes meklējumi nenotiek vai tā ir nepilnīga.
2. *Priekšlaicīgā identitāte* – etnicitātes meklējumi nenotiek, taču indivīds apzinās savu etnisko piederību. Cilvēkam ir gan pozitīvās, gan negatīvas emocijas attiecībā uz savu etnisko grupu. Attieksmes veidošanās balstās uzticoties nozīmīgu apkārtējo cilvēku sniegtai informācijai, nevis uz personisko pieredzi vai pārdzīvojumiem.
3. *Moratorija identitāte* – indivīds aktīvi meklē savu etnisko piederību un atrod neskaidrības tajā, kas savukārt izraisa krīzi. Krīzē indivīds izvēlas dažādus attīstības variantus, kurus var uzskatīt par sev pieņemamiem. Šis stāvoklis veidojas etniskās identitātes meklējumos multietniskā vidē un ir saistīts ar izvēlētās grupas statusu sabiedrībā.
4. *Nobriedusī identitāte* – indivīds atrodas pārejas stāvoklī no meklējumiem uz pašrealizācijas stabilitāti. Krīze ir veiksmīgi pārvarēta un uz personiskās pieredzes pamata veidojas priekšstati par savu etnicitāti. J. Marsia izvirza nobriedušas identitātes kritērijus, kam ir mainīgs raksturs un kas saistīta ar nodarbošanos, reliģiju un politisko ideoloģiju, krīzes pārdzīvojumiem un pārliecības sasniegšanu. Nobriedušo identitāti indivīds sasniedz tad, ja pārdzīvo krīzi un apzināti izvēlas profesiju, reliģiju un etnisko grupu (Marsia J. 1980).

Pētot apstākļus, kas iespaido *etniskās identitātes* veidošanu kā pirmo izdala valodu, otro – kultūru, trešo – ģimeni. Savukārt Tatjana Akopjana (Татьяна Акопян) sniedz šādu ietekmējošo faktoru gradāciju: pirmajā vietā ir etnosociālie faktori, otrajā – etnokulturālie un trešajā – etnopsiholģiskie. Faktoru nozīme mainās atkarībā no cilvēku dzīves posma, kas nosaka arī personisko etnisko identitāti.

1. *Etnosociālie faktori* (apkopojošie) ietver vēsturiskās attīstības apstākļus, vecāku etnosu, situāciju reģionā, sociālās vides etnisko struktūru, etnokultūras politiku, apkārtējo socioetnisko raksturojumu.

2. *Etnokultrālie faktori* (specifiskie) nosaka etniskās identitātes veidošanu un ietver nacionāli jaukto ģimeņu struktūru, ģimenes tradīcijas, valodu, saskarsmi vienaudžu grupās, izglītības kultūru, radnieciskos tīklus, kā arī nacionālo dzīvi iespaidojošas situācijas.
3. *Etnopsiholoģiskie faktori* (primārie) raksturo ģimenes psiholoģisko klimatu, starppersonu attiecības, lomu struktūru ģimenē.

Personiskā etniskā identitāte saistīta ar ģimeni un ārējo apstākļu ietekmi, kas nosaka individuālās etnoidentitātes saglabāšanas iespējas. Multietniskajā vidē etniskās identitātes veidošanu nosaka kā ģimenes sastāvs, tā arī mijattiecības tajā. Multietniskajā vidē ģimenēs var veidoties dažādas etniskās identitātes formas: pozitīvā monoetniskā, bietniskā, marginālā. Raksturojot šīs formas, zinātniece piebilst, ka:

- *Pozitīvā monoetniskā identitāte* veidojas pateicoties spēcīgai emocionālai saiknei ar vienu no vecākiem un atbalstam no otra vecāka.
- *Bietniskā identitāte* veidojas pateicoties spēcīgai emocionālai saiknei ar abiem vecākiem, ja viņi abas etniskās grupas uzskata par līdzvērtīgām.
- *Marginālā identitāte* veidojas identitātes krīzē, kad problēmas rodas vecākiem ar dažādu etnisko identitāti.

Tieši marginālie indivīdi ir tie aģenti, kas nosaka etnicitātes strukturālo intensitāti. Etniskā struktūra ļauj bērnam salīdzināt un izvēlēties etnisko piederību. Ja pavisam nesen identitāšu mainīgumu uzskatīja par marginalizāciju, tad šodien tiek uzskatīts, ka marginalizācijas riskam pakļauti ir tie, kas saglabā savu identitāti, neskatoties uz mainīgo sociālo situāciju un kas nevar pieņemt jauno sociālo realitāti (Национально-гражданские идентичности, под ред Л.Дробижевой, Е.Головаха., Киев, 2007).

Savas etniskās piederības apzināšanos variējas atkarībā no tā, kādā vidē – polietniskā vai monoetniskā, dzīvo bērni. Multikulturāla vide indivīdam sniedz lielākas iespējas izzināt savas un citas etniskās grupas īpatnības, kā arī attīstīt komunikatīvās prasmes. Jo bagātāka ir pieredze starpetniskās attiecībās, jo lielāka ir interese arī par savu etnisko piederību. Savukārt to, cik pozitīvi ir sociālie pieņēmumi, nosaka bērna piederība etniskajam vairākumam vai etniskā mazākuma grupai. Indivīdiem, kuri dzīvo vidē ar izteikti atšķirīgu etnisko kultūru, etniskā identitāte ir vairāk izteikta, bet indivīdiem, kuri dzīvo starp grupām ar līdzīgu kultūru, savas identitātes apziņa nav tik aktuāla.

Secinājumi

1. Mūsdienu sociālajā psiholoģijā tiek risināta sociālās un personiskās identitātes saskaņotības problēma, tiek uzskatīts kā šīs abas identitātes papildina viena otru. Identitātes veidošana notiek visas dzīves garumā un pārdzīvo vairākas krīzes, kuras saistītas ar konfliktiem starp izveidotās identitātes saturu un sociālo situāciju. Identitāte saturā ir ne tikai personiskais, bet arī vēsturiskais konteksts.
2. Pasaulē novēroti procesi, kam raksturīga intensīva etnoidentitātes apzināšana– piederība noteiktam etnosam (etnokopienai). Indivīdiem etnoss ir psiholoģiskās kopības izjūta un etniskā identitāte ir viena no tās raksturīpašībām.
3. Etniskās identitātes veidošanu determinē dzīves pieredze un apstākļi, kurus nosaka kā reģionālā specifika, tā arī sabiedrības etniskais sastāvs, sociāli ekonomiskās, politiskās, vēsturiskās un kultūras reģionālās īpatnības.
4. Nacionālā un etniskā identitāte ietver ne tikai politiskās, bet arī kultūrvēsturiskās iezīmes, jo tajā atspoguļojas izmaiņas sabiedrībā un pēc šīm izmaiņām spriež par sabiedrības attīstību kopumā. Tai pašā lakā, identitātes mainīgums pamudina cilvēkus uz orientēšanos un mobilizāciju, kas kļūst par nozīmīgu sociālo resursu.
5. Domājot par sabiedrības ilgtspējīgu attīstību multietniskuma apstākļos, minēto jautājumu izpēte ir aktuāla ne tikai latviešiem, bet arī citām etniskajām kopienām Latvijā. Ilgtspējīga attīstība paredz kultūru plurālismu kā vienu no būtiskākajiem sociālās ilgtspējas komponentiem. Latvija arī nākotnē attīstīsies kā polietniska valsts, un tāpēc ir nepieciešams novērtēt līdzšinējās etnopolitikas atbalsta programmas darbības rezultātus, atklājot to ietekmi kā uz etnisko identitāšu veidošanos, tā arī uz saglabāšanas un attīstības stratēģijām.

Izmantoto literatūras avotu saraksts

1. Abes, E. S. Jones, S. R. (2004) Reconceptualizing the Model of Multiple Dimensions of Identity: The Role of Meaning-Making Capacity in the Construction of Multiple Identities Journal of College Student Development – V. 48, Nr. 1, pp.1-22.
2. Anderson B.(1991) Imagined Communities: Reflections on the Origin and Spread of Nationalism,London;Verso Edited By Wimmer A. Ethnic Exclusion in Nationalizing States P.334-336. http://www.sscnet.ucla.edu/soc/faculty/wimmer/SageReaderNationalism.pdf
3. Barth F.(2000) Boundaries and connections Edited by Anthony P. Cohen Signifying.Identities.Anthropological.Perspectives.on.Boundaries.and.Contested.Values P.20-24. http://namcub.accelalabs.com/stories/pdf/Signifying.Identities.Anthropological.Perspectives.on.Boundaries.and.Contested.Values.eBook-EEn.pdf#page=21.,P.178.
4. Breakwell G.M.(1993), Social Representation and Social Identity, University of Surrey, Guildford, Great Britain .P.7-8. http://www.psr.jku.at/PSR1993/2_1993Brea2.pdf
5. Cohen.A.P.(2000)Signifying.Identities.Anthropological.Perspectives.on.Boundaries.and.Contested.Values., P.9-12.http://namcub.accelalabs.com/stories/pdf/Signifying.Identities. Anthropological.Perspectives.on.Boundaries.and.Contested.Values.eBook-EEn.pdf#page=21.,P.178.

6. Erikson E.H.(1976) Edited by Pulkkinen L., Kokko K. Journal of Research in Personality Identity Development in Adulthood: A Longitudinal Study V. 34, Is. 4, Dec. 2000, P. 445-470
7. Freids Z. (1997)Psihoanalīzes nozīme un vēsture,R., 181.lpp
8. Gellner E.(1983) Nations and Nationalism. Ithaca.NY:Cornell University Press. Edited By Wimmer A.Ethnic Exclusion in Nationalizing States P.334-336. http://www.sscnet.ucla.edu/soc/faculty/wimmer/SageReaderNationalism.pdf
9. Hobsbawn E.,Ranger T.(eds)(1983) The Invention of Tradition.Cambridge: By Wimmer A.Ethnic Exclusion in Nationalizing States P.334-336 Cambridge University Press. Edited By Wimmer A.Ethnic Exclusion in Nationalizing States P.334-336 http://www.sscnet.ucla.edu/soc/faculty/wimmer/SageReaderNationalism.pdf
10. Marsia.J.(1980) Identity in adolescence//Handbool of. Adolescence psychology.N.Y..,P.159-187.
11. Phinney J.S., Horenszyk G., Liebkind K., Vegger P. (2001) Ethnic Identity, Immigration, and Well-Being: International Perspektive, Journal of Social Issues,V.57.N.3.,p.496-499. http://cretscmhd.psych.ucla.edu/events/PhinneyPaper.pdf
12. Vēbers E. (1995) Nacionālā politika Baltijas valstīs., LZA, FSI Rīga ,Zinātne, , E.Vēbera, R. Kārkliņas red., Etniskā identitāte un politiskā nācija lpp.136-138.
13. Акопян Т.А. (2003) Детско-родительские отношения как фактор формирования этнической идентичности в национально-смешанных семьях.,Диссерт. канд. психол. наук: Спб. с. 239., РГБ ОД, 61:03-19\542-6
14. Бромлей Ю.В. (2009) Очерки истории этноса.,**Изд.** Либроком, 440 стр. ISBN**:** 978-5-397-00836-5 .
15. Национально-гражданские идентичности (2007) (Опыт Украины и России в период трансформации) под ред Л.Дробижевой, Е.Головаха. Институт социологии Национальной академии Украаины, Институт социологии Российской академии наук, Киев, с.12-16.
16. Соболева Н.С. (2008) Исторический и современный контексты исследования этнической идентичности // Сборник "Проблемы социальной психологии личности".с.8., изд.СГУ http://psyjournals.ru/sgu_socialpsy/issue/30279_full.shtml

IZGLĪTĪBAS IESTĀDES VIETA MĀCĪBU REĢIONĀ

THE PLACE OF EDUCATIONAL INSTITUTIONS IN A LEARNING REGION

Iveta Kāposta, Dr.paed.
Rīgas Pedagoģijas un izglītības vadības akadēmija
iveta.kaposta@rpiva.lv
Tel. +371 29132756

Abstract. A learning region is a region that develops on the education of people who live and work there. The needs based on their identity and maintenance are identified and defined to develop their competitive opportunities by investment in increasing of social capital. The principle of continuous teaching is realized in region, because development of human resources is the part of development strategy in the region. Municipal involvement in learning is one of the cornerstones to ensure sustainability strategy in public development.
The social functions of the school were analyzed and obviously they can be interpreted in the context of regional development. The school is the highest grade of ambivalent modern public education as a institution form.
The municipality constructs a comprehensive collaboration network of educational institutions that gives the opportunity to constitute various educational projects. Educational institutions unite their resources, thereby the quality of offer increases significantly.
It is necessary to include the dimension of region in the structure of educational institutions activities. The educational institution has to maintain a high level of educational standards and quality of education and to consider the strategies of regional development. It is necessary to analyze and evaluate the influence of educational institutions activities on regional development regularly, as well as to search for new types and forms of activities constantly to stimulate its influence on regional development.
The educational institution operates as an expert in the introduction of creative innovations in learning in regional activities. These purposeful activities create the situation that the educational institution is important in the solution of regional educational problems.
Keywords: development strategy in region, educational institution, introduction of innovations, learning region, social capital

Mūsdienu mainīgajā sociāli ekonomiskajā situācijā Latvijā notiekot salīdzinoši jaunu izglītības sistēmas modeļu izstrāde un pamatošana. Vēl jo aktuālāks šis process kļuvis pēc administratīvi teritoriālās reformas. Daudzās Eiropas valstīs jau kādu laiku tiek veidoti un attīstīti mācību reģioni. Šī raksta ietvaros, izanalizējot teorētiķu atziņas, Eiropas valstu pieredzi, kā arī LR normatīvos aktus, tiks pamatota izglītības iestāžu loma un iespējas mācību reģiona izveidē un attīstībā.

Jēdziens „reģions" dažādu nozaru ietvaros tiek lietots un interpretēts daudzveidīgi. Tādējādi tā saturs ir atkarīgs no pētnieka pieņēmumiem un atbilstošās nozares izpētes tradīcijām. Kā savā pētījumā konstatējuši I.J.Mihailovs un A.Stankevičs, Latvijā dominē divas šī jēdziena izpratnes:

1. Reģions kā valsts teritorijas, valsts un tās tautsaimniecības daļa, kurai ir raksturīgs kopveselums un noteikta vienotība. Tā ir noteikta (apakš)sistēma, kura raksturo noteiktas pazīmes, specializācija, funkcionēšanas iespējas, specifiskums.

2. Reģions kā termins, kas ļauj skaidrot centra un perifērijas (hierarhiskās) attiecības. (Mihailovs, Stankevičs, 2011)

Izglītības attīstības pamatnostādņu 2007.-20013.gadam un Profesionālās izglītības iestāžu tīkla optimizācijas pamatnostādņu 2010.-2015.gadam analīze ļauj secināt, ka izglītības politikas plānošanā jēdziens „reģions" tiek lietots pirmajā nozīmē (Izglītības attīstības pamatnostādnes 2007.-2013.gadam, Profesionālās izglītības iestāžu tīkla optimizācijas pamatnostādnes 2010.-2015.gadam). Šī pieeja ievērota arī izglītības politikas normatīvajos dokumentos: Izglītības likumā, Vispārējās izglītības likumā, Profesionālās izglītības likumā un citos dokumentos.

Administratīvi teritoriālās reformas rezultātā Latvijā ir izveidojušies jauni reģioni (novadi), kuru viena no funkcijām ir izglītības funkcija. Novadu pašvaldībām nākas risināt jautājumu, kā ierobežotu finanšu apstākļos īstenot izglītības funkciju, nodrošinot izglītības pieejamību un izglītības kvalitāti reģionā. Turklāt administratīvi teritoriālā reforma notika vienlaicīgi ar izglītības iestāžu finansēšanas reformu (vispārīgās izglītības iestādēs ieviešot modeli „Nauda seko skolēnam").

Izglītības funkciju parasti ir izprot kā iespēju nodrošināšanu bērniem un jauniešiem konkrētajā reģionā iegūt pilnīgus un pilnvērtīgus izglītības pakalpojumus, tātad iespēju iegūt likumā paredzēto izglītību. Mazāk uzmanības tiek pievērsts pieaugušo izglītībai kā mūžizglītības daļai. Taču mainīga darba tirgus apstākļos mūžizglītība iegūst aizvien lielāku nozīmi, tas ir līdzeklis, kā pilnveidot esošās un attīstīt jaunas profesionālās kompetences (skatīt 1.attēlu).

1.attēls. Izglītības ieviešana (Educational Introduction, 2009)

Sašaurinot izglītības funkcijas izpratni, neizbēgami var nonākt pie atziņas, ka izglītība ir tikai indivīda nepieciešamība un pašvaldībai par reģiona iedzīvotāju izglītošanās iespēju jārūpējas tikai tādēļ, lai nodrošinātu viņu tiesības uz izglītību, tādējādi saglabājot reģiona apdzīvotību. Tomēr izglītība ir ne tikai indivīda, bet arī sabiedrības nepieciešamība: tas ir līdzeklis sociālā kapitāla vairošanai, kas, savukārt, rada labvēlīgus apstākļus reģiona attīstībai (skat.1.attēlu).

Lai šo problēmu atrisinātu nepietiek tikai ar valsts līmenī pieņemtiem lēmumiem. Lielākā daļa no tiem ir vērsti uz jaunās paaudzes izglītošanas stratēģiju, tātad ilgtermiņa risinājumiem. (DNB Nord Latvijas barometrs, 2011) Bet problēma, pirmkārt, skar pieaugušos, kuriem ir grūtības iekļauties darba tirgū savu neatbilstošo kompetenču dēļ. Problēmas taktiskie risinājumi jāmeklē reģionos, jo katram plānošanas reģionam un katram novadam ir sava īpašā attīstības vīzija. Vairāku Eiropas valstu pieredze liecina, ka viens no izglītības jautājumu risināšanas veidiem ir mācību reģionu veidošana, tie nodrošina izglītības kultūras un izglītības tradīciju kopšanu un attīstīšanu (http://www.gwydrilearningregion.nsw.edu.au (sk.05.07.2011), http://www.lernende-regionen.info (sk.07.07.2011)).

Mācību reģions ir reģions, kas attīstās uz tajā dzīvojošo un strādājošo mērķtiecīgas izglītošanas pamata. Te īpaši jāuzsver „mērķtiecīga izglītošana". Proti, reģionā tiek nodrošināta, nevis daudzveidīgas izglītības ieguve vispār, bet profesionālā un daļa pieaugušo izglītības piedāvājuma tiek plānots atbilstoši reģiona attīstības vajadzībām un darba tirgus attīstības prognozēm. (Longworth , Osborne, 2010) Tas nozīmē, ka, veidojot un īstenojot reģiona attīstības vīziju, tiek paredzēts arī tas, kādas kompetences ir un būs nepieciešamas cilvēkiem ilgtermiņā, lai šo vīziju varētu īstenot, un tas, kā šīs kompetences iegūstamas, pirmām kārtām, apzinot paša reģiona iespējas to nodrošināšanā. Pašvaldības iesaistīšanās mācību reģionu kustībā ir viens no stūrakmeņiem ilgtspējas stratēģiju nodrošināšanai tā sabiedrības attīstības jomā. Tātad, par pilnvērtīgu mācību reģionu var runāt tad, kad reģiona vadībai un tā iedzīvotājiem ir skaidrs priekšstats par reģiona attīstības vajadzībām (jo reģionā ir strukturēta nākotnes tirgus aina),pastāvīgi notiek profesionālo struktūru atjaunošanās. Balstoties uz šiem priekšstatiem, reģionā ir izveidota un darbojas sistēma, kas iezīmē kompetenču prasības nākotnē, kā arī ir izveidota attīstības un atbalsta vērtēšanas sistēma. (Longworth, 2006)

Mācību reģions raksturojas ar to, ka ir apzinātas un nodefinētas uz savu identitāti un tās uzturēšanu balstītās vajadzības, lai attīstītu savas konkurences iespējas, investējot cilvēkresursu attīstībā. Reģionā tiek realizēts nepārtrauktas mācīšanās princips, jo cilvēkresursu attīstība ir reģiona attīstības stratēģijas daļa (Longworth, 2006). Ir izveidota tīkla datu sistēma, kas atbalsta mācīšanos un veicina inovāciju plānošanu un ieviešanu reģionā. (Simmie, 2005). Piemēram,

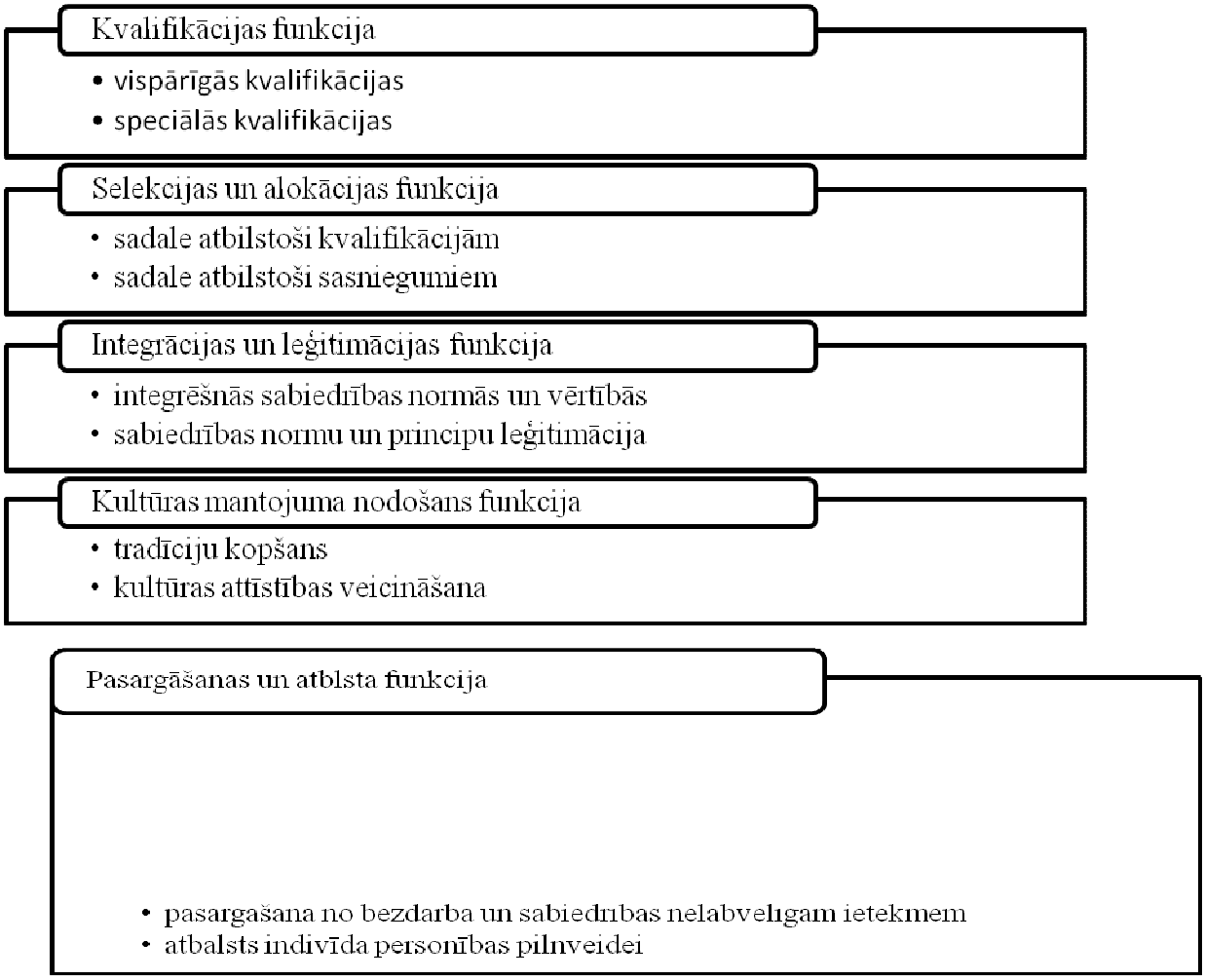
Vācijas Federālā izglītības un pētniecības ministrija ir veicinājusi 70 mācību reģionu izveidi visā valstī. To mērķis ir attīstīt reģionālo mācību kultūru, kā arī padarīt par iespējamu un uzlabot izglītību mūža garumā. (Die Netzwerkeinden Lernenden Regionen, 2011)

Kā zināms, izglītības iestāde ir izglītības programmu īstenošanai mērķtiecīgi organizēta, valsts vai pašvaldību dibināta iestāde, kā arī valsts, pašvaldību vai citu juridisku vai fizisku personu dibināta uzņēmējdarbība (uzņēmums) ar profesionāli pedagoģiski sagatavotu personālu un izglītības mērķiem atbilstošu materiālo bāzi. (Pedagoģijas terminu skaidrojošā vārdnīca, 2000) Katrā reģionā darbojas dažādas izglītības iestādes, kuru resursus ir iespējams šim nolūkam piesaistīt. Lai rezultāts būtu efektīvs, izglītības iestāžu tīklam un pārklājumam ir jābūt daudzpusīgam. Starp darba devējiem un izglītības iestādēm jānotiek informācijas apritei par nākotnē nepieciešamajām kompetencēm un to apguves iespējām. (Simmie, 2005) Tomēr, jāatzīst, ka pagaidām ne vienmēr skolās pieejamie resursi tiek mērķtiecīgi izmantoti reģiona attīstībai. Lai šo trūkumu novērstu, reģiona vadītājiem un uzņēmumu vadītājiem ir jāapzinās skolas nozīme un jāapzina tās iespējas reģiona attīstībā.

Parasti tiek uzskatīts, ka skola ir iestāde, kurā mācās noteikta vecuma bērni, pusaudži vai jaunieši. Tātad tā nodrošina izglītības ieguvi atbilstošā pakāpē. Tomēr mūsdienās vairs nedrīkst tik šauri traktēt skolas pastāvēšanu. Skola ir viens no plašāk pazīstamajiem izglītības iestāžu veidiem. Tā ir ambivalenta modernās sabiedrības izglītošanas institūcijas forma visaugstākajā pakāpē.

Izglītības iestāde nav autonoma institūcija. No sistēmteoriju, skolu organizācijas socioloģiskās teorijas un strukturāli funkcionālās teorijas viedokļa tā ir citas sistēmas (šajā gadījumā, reģiona) apakšsistēma. Izanalizējot skolas sociālās funkcijas (skatīt 2.attēlu), redzams, ka reģiona attīstības kontekstā šīs funkcijas ir traktējamas krietni plašāk kā tas ir ierast.

Vācu pedagogs H. Gudjons, norāda uz 4 skolas sabiedriskajām funkcijām (Gudjons, 1998), bet izanalizējot, LR izglītības likumdošanas aktus, redzams, ka Latvijas Republikā valsts skolām ir deleģējusi 5 funkcijas. (Vispārējās izglītības likums(sk. 30.06.2011), Profesionālās izglītības likums (sk. 30.06.2011)).



2.attēls. Skolas funkcijas

Kvalifikācijas funkcija

Šī ir pati senākā no skolas funkcijām, taču attīstoties sabiedrībai ir mainījies un paplašinājies tās saturs. Ar jēdzienu „kvalifikācija" šīs funkcijas ietvaros tiek saprastas zināšanas, prasmes, spējas, attieksmes, personības īpašības, kas mācību laikā tiek attīstītas. Visas kvalifikācijas var iedalīt divās grupās: vispārīgās kvalifikācijas, tās, kuras nepieciešamas ikvienam sabiedrības loceklim, lai viņš varētu pilnvērtīgi dzīvot šajā sabiedrībā (piemēram, lasītprasme, rēķinātprasme); speciālās kvalifikācijas, tās, kuras nepieciešamas kādā noteiktā dzīves jomā. Sabiedrībai attīstoties, gan vispārīgo, gan speciālo kvalifikāciju klāsts mainās. Piemēram, vēl 20.gs. 90.gados datorlietošanas prasme ietilpa speciālo prasmju sarakstā, bet pašlaik tā pieskaitāma pie vispārīgajām prasmēm. Ikvienā izglītības iestādē ir kvalifikācijas funkcijas nodrošināšanai nepieciešamie resursi: profesionāli sagatavoti pedagogi, materiālie resursi (aprīkojums, mācību materiāli utt.), ja tā nebūtu, skola nemaz nevarētu pastāvēt. Plānojot reģiona attīstībai nepieciešamo kompetenču apguves

nodrošināšanu, būtu tikai precīzi jāapzina, kuru kompetenču apguvi vislabāk varētu nodrošināt katrā no reģionā esošajām izglītības iestādēm.

Selekcijas un alokācijas funkcija

Modernā sabiedrība, kā zināms, ir augsti organizēta pēc darba un funkciju sadales. Līdz ar to dažādās izglītības iestādes veic savu skolēnu alokāciju (sadali) atbilstoši kvalifikācijām pa nodarbinātības veidiem un līmeņiem. Kā norāda H.Gudjons, sociālā izlase un izlase pēc panākumiem ir nedalāmas. Abas šīs izlases izglītības iestāde nodrošina ar sasniegumu kontroles palīdzību.

Integrācijas un leģitimācijas funkcijas

Skolai jā rūpējas par skolēnu iekļaušanos (integrēšanos) sabiedrībā apgūstot, izprotot un pieņemot tās normas un vērtības. (Reģiona attīstība arī ir uzskatāma par vienu no konkrētās sabiedrības vērtību.)

Kultūras mantojuma nodošanas funkcija

Izglītības iestādē iepazīšanās ar kultūras mantojumu paver iespējas progresam, jo, saistot dažādu paaudžu kultūru, tiek veidota un attīstīta kultūridentitāte.Kopjot un uzturot reģionam raksturīgās tradīcijas, tiek nodrošināta tā atpazīstamība, savdabība (Gudjons, 1998).

Pasargāšanas un atbalsta funkcija

Izglītības iestādē izglītojamais tiek pasargāts no bezdarba un sabiedrības nelabvēlīgām ietekmēm: viņš tiek nodarbināts (tādējādi izglītojamajam nav laika nodarboties ar sociāli bīstamām aktivitātēm, piemēram, alkohola lietošana) un vienlaikus apgūst daudzveidīgas prasmes un zināšanas, kuras var izmantot dažādās dzīves darbībās, tajā skaitā arī profesionālajā darbībā. Apgūstot, daudzveidīgas zināšanas un prasmes tiek atbalstīta un veicināta indivīda personības pilnveide (skat. 1.attēlu).(Vispārējās izglītības likums(sk. 30.06.2011), Profesionālās izglītības likums (sk. 30.06.2011)).

Ja reģiona pašvaldība skaidri apzinās šīs funkcijas, tā var iesaistīt savā teritorijā atrodošās izglītības iestādes reģiona attīstības uzdevumu risināšanā, dodot tām skaidrus uzdevumus. Piemēram, vienā no Lielbritānijā izveidotajiem mācību reģioniem komūnas pašvaldība izvirzījusi šādus mērķus:

- Izveidot vadības struktūru, organizāciju, nodarbojoties ar savu vīzijas veidošanu;
- veicināt, ka katrs kopienas loceklis varētu pilnībā piedalīties mācību kopienas darbā;
- uzlabot esošo izglītības un mācību praksi kopienā;

- nodrošināt, ka reģiona nākotnes nodarbinātības vajadzības tiek ņemtas vērā, kompetenti plānojot mācības. (Gwydri Lerning Region, 2011)

Tiešās izmaksas pašvaldībai ir salīdzinoši nelielas, bet ieguvums ir milzīgs, jo tā ir palīdzējusi attīstīt sadarbības kultūru starp dažādiem izglītības sniedzējiem, kas darbojas vienā novadā. Tā, piemēram, Vācijā izveidotais izglītības iestāžu tīkls nodrošina:

- piedāvājumu individuālām izglītības konsultācijām,
- jaunas mobilas mācību vietas un atbalsta (konsultāciju) punktus,
- pasākumus neformālās izglītības atzīšanai,
- izglītības kvalitātes vadību,
- projektus pārejai no skolas uz darba tirgu (profesiju),
- pasākumus starpkultūru izglītībai, valodas apguvei,
- mērķtiecīgu tālākizglītību sadarbībā ar mazajiem un vidējiem uzņēmējiem,
- pasākumus sievietēm un vīriešiem, kuri pēc bērnu kopšanas vēlas atgriezties darba dzīvē. (Die Netzwerkeinden Lernenden Regionen, 2011)

Kā redzams no šī piemēra, iespējas pie salīdzinoši nelieliem izdevumiem ir plašas un tiešām palīdz īstenot izglītības politiku un lokālās ekonomikas politiku.

Taču, arī izglītības iestādei ir jābūt pietiekami aktīvai un, savu iespēju robežās, jāpiedalās reģiona attīstības projektos. Mācību reģiona dimensiju ir nepieciešams iekļaut izglītības iestādes aktivitāšu struktūrā. Izglītības iestādei jārūpējas par augsta līmeņa izglītības standartiem un kvalitāti un mācībām, ievērojot reģiona attīstības stratēģijas. Pats vienkāršākais veids ir piedāvāt papildmācības gan skolēniem, gan viņu vecākiem, tādējādi stiprinot mācību reģiona identitāti.

Patlaban Latvijā, nereti viena reģiona izglītības iestādes cita citu uztver kā konkurentus, bet tā vietā labāk būtu, ja ikviena izglītības iestāde kopā ar citām reģiona izglītības iestādēm veido daudzpusīgu sadarbības tīklu, lai nodrošinātu reģiona attīstības mērķa īstenošanu. Katrai skolai ir savas stiprās puses un resursi (visbiežāk tie ir tieši cilvēkresursi: pedagogi ar dažādām kompetencēm un potenciālu (kuru ne vienmēr ir iespējams pilnībā atklāt un realizēt, veicot ikdienas darbu ar skolēniem), taču tie var būt arī materiālie resursi, piemēram, īpaši ierīkotas telpas, kāds noteikts aprīkojums u.tml.), kādu nav citās reģiona izglītības iestādēs. Tieši šos resursus arī nepieciešams popularizēt un piedāvāt. Veidojot dažādus izglītības projektus, izglītības iestādes var apvienot savus resursus, tādējādi ievērojami paaugstinot piedāvājuma kvalitāti.

Bez tam nepieciešams regulāri analizēt un vērtēt izglītības iestādes aktivitāšu ietekmi uz reģiona attīstību, kā arī nepārtraukti meklēt jaunus aktivitāšu veidus un formas, lai veicinātu tās

ietekmi uz reģiona attīstību. Bet, lai tā notiktu, reģiona attīstībai ir jākļūst par vienu no izglītības iestādes galvenajiem stratēģiskajiem uzdevumiem. Tas, savukārt iespējams tikai tad, ja izglītības iestādē izprot pārmaiņas biznesa pasaulē un to ietekmi uz mācībām, kas jāievēro mācību reģiona attīstībā. Tad izglītības iestāde, izmantojot daudzveidīgas nākotnes paredzēšanas (prognostikas) metodes par reģionā nākotnē nepieciešamajām kompetencēm, spēj savlaicīgi reaģēt uz darba tirgus un darbaspēka vajadzībām reģionā, sagatavojot atbilstošu izglītības piedāvājumu. Tādējādi izglītības iestāde darbojas kā eksperts radošā inovāciju ieviešanā reģiona darba dzīvē. Šāda mērķtiecīga darbība rada situāciju, kad izglītības iestādei ir viena no galvenajām lomām izglītības jautājumu risināšanā reģionā. Šāda attieksme pret skolu un pedagogiem, kuri, protams, kļūst galvenie praktisko izglītības jautājumu risinātāji reģionā, nodrošina pedagogu pašapziņas celšanos, viņu potenciāla (gan intelektuālā, gan radošā, gan praktiskās darbības) pilnīgāku izmantošanu, pedagoga darba prestiža celšanos, un tādējādi tiek veicināta pedagogu darba motivācija.

Secinājumi

1. Mācību reģions ir jauna stratēģija izglītības funkcijas īstenošanai reģionā.
2. Skolas funkcijas pilnībā raksturo skolas iespējas iekļaušanos mācību reģionā.
3. Izglītības iestāde darbojas kā eksperts radošā inovāciju ieviešanā reģiona darba dzīvē. Šāda mērķtiecīga darbība rada situāciju, kad izglītības iestādei ir viena no galvenajām lomām izglītības jautājumu risināšanā reģionā.

Izmantoto lieteratūras avotu saraksts

1. Izglītības likums. http://www.likumi.lv/doc.php?id=50759 (sk. 15.06.2011.)
2. Izglītības attīstības pamatnostādnes 2007.-2013.gadam. http://wwwizm.gov.lv (sk. 15.06.2011.)
3. Profesionālas izglītības iestāžu tīkla optimizācijas pamatnostādnes 2010.-2015.gadam. http://www.izm.gov.lv (sk. 15.06.2011.)
4. Profesionālās izglītības likums. http://www.likumi.lv (sk. 15.06.2011)
5. Vispārējās izglītības likums. http://www.likumi.lv (sk. 15.06.2011.)
6. DNB Nord Latvijas barometrs, 2010. http://www.dnbnord.lv/abaut/news/2010 (sk. 30.06.2011)
7. Education Introduction. http://www.thi.org.au (sk. 04.07.2011)
8. Gudjons H.(1998) Pedagoģijas pamatatziņas. Rīga, Zvaigzne ABC. 394 lpp.
9. Gwydri Learning Region. http://www.gwydrilearningregion.nsw.edu.au (sk.05.07.2011)
10. Longworth N. (2006) Learning Cities, Learning Regions, Learning Communities: Lifelong Learning and Local Governement. London, Routledge. 248p.
11. Longworth N, Osborne M. (2010) Perspectives on Learning Cities and Regions: Policy, Practice and Partipation. London, NatInsof Adult continuing. 320 p.
12. Mihailovs J.I., Stankevičs A. (2011) Jēdziena „reģions" izpratne Latvijas izglītībā. Sabiedrība, integrācija, izglītība. *Starptautiskās zinātniskās konferences materiāli*. I daļa Rēzekne, RA izdevniecība. 210.-215. lpp.
13. Die Netzwerkeinden Lernenden Regionen. http://www.lernende-regionen.info (sk.07.07.2011)
14. Simmie J. (2005) Innovation, Networks and Learning Regions. London, Taylor and Francis Group. 258 p.
15. Pedagoģijas terminu skaidrojošā vārdnīca (2000). Rīga, Zvaigzne ABC

CULTURAL IDENTITY AND MEDIA COVERAGE

КУЛТУРНА ИДЕНТИЧНОСТ И МЕДИЙНО ОТРАЗЯВАНЕ

Assoc.prof. Lulivera Krusteva, Ph.D., St.Kl.Ohridski University of Sofia, Bulgaria, Nezabravka St.11,Sofia 1113, lulivera @abv.bg, tel. tel. (+3592)884592305

Abstract. The various aspects of cultural heritage and their media coverage are analysed in a case study, based on material excerpted from 9 dailies and 3 weeklies covering the last five years and thematically classified in four groups. The present paper focuses on only one of these groups, namely the cases revealing the deficit in communication concerning the barbarous destruction of valuable archeological findings, due to the lack of adequate policy on the part of the corresponding institutions, particularly in the cases of obvious conflicts of interests (the investors' interests in particular) on the one hand, and on the other, the passivity of the media with regards to the discussion of these problems (for example, the "slippery" cases of private collections and museums, the difficulties the respective institutions have concerning the preservation of the old Black Sea settlements of Sozopol and Nesseber, included in the UNESCO list of places of important cultural heritage, the ancient Roman amphitheatre and the Yablanski house in Sofia, and many others.).
On this basis the thesis of media civilization anomie is developed. The major conclusion is that the remarkable historical heritage is not as yet properly used as a tool for enhancing the national and regional self-confidence, with a view to improving the image of the Balkans as an attractive tourist destination and its role in European civilization.
Key words: cultural heritage, institutional and media passivity, media civilization anomie, deficit of national self-consciousness.

Introduction

The issue of cultural identity and globalization and of communication between various civilizations can be discussed from a different and rather non-traditional – at first glance – point of view, namely, in the perspective of our cultural memory and the parameters of its media coverage .The opening of frontiers, the unprecedented mobility and the inevitable interpenetration of a great variety of cultures raise a number of questions related to the local, regional and national identity. There are many scholars as for example Roland Robertson, professor in Sociology and History of Religion at the University of Pittsburg, who are against the polarization of the global and the local: according to him "the universal and the particular" must be combined (Robertson, 2004:81). The idea of wholeness, of undividedness, contained in the construct of globality is understood by some of the critics of globalization as a systematic demolition of the foundations of a society. However, there is also the notion of "glocal" – a combination of the notions of "global" and "local", which interpenetrate one another and merge and intermix, says Robertson (2004:48).

The major hypothesis of the present study is that the preservation of the national identity can lead to the development of the respective society and of globalization in general to a higher, to a more dynamic level. The object of the empirical part of the study is to analyze the way in which the institutions and the media fatefully underestimate the gravity of the problem. There are often ostentatious statements about the necessity of a dialogue between the cultures and their self-specificity. But what we see in practice is an

alarming replacement of problems, all done in the name of "europezation" or "globalization", leading to the annihilation of basic foundations and obliteration of important parameters of our cultural heritage, to the ruining of valuable historical monuments, all this often due to institutional disinterest – the result of a 'Why should I care' attitude, or to investors' appetites or conflict of interests. There is also a tendency on the part of the media to reduce cultural identity to regional mentality (in our case – to Balkan mentality) .The institutions and the media significantly underestimate the role of cultural specificity as a guiding force in the process of European and global communication. What is simulated is Eurointegration, the actual result of which is loss of national identity, due most of all to the lack of national self-confidence and underestimation of the economic dimensions and of cultural identity (unlike some of our neighbouring countries which manage to make use of all this to their benefit). It was only 0.6 per cent - and from this year – only 0.5 per cent of the Gross National Product (GNP) that is allotted for the preservation, development and popularization of customs and traditions. This problem, however, is not on the agenda of either governmental institutions or the media, although there are many examples of cultural policies to be followed in this respect (there are countries in which every excavated stone is transformed into a tourist destination).

"It is only the nations that manage to preserve their national, popular and ethnical physiognomy, in spite of the toll of globalization, that have all the chances to survive as individual states in the globalized world", is what popular psychologists suggest (Semov, 2004:62). Those that do not manage to do that, will simply dissolve, will dilute and disappear in the vast sea of similarities, they underline. Therefore, the problem of cultural identity, of the necessity to pay greater attention to the local on the part of the state and the media, is a particularly important national strategy, because a well-preserved cultural specificity can contribute to the formation of a more variegated global image. Viewed in such a perspective, the topic – it seems to me – has many common perspectives relevant to both the Balkans and the Baltic region, in spite of the distance of 1580 kilometers between them.

Methodology

The problem of cultural identity and eurointegration through the eyes of the media is analyzed on the basis of 2450 journalistic materials discussing the fate of a variety of cultural values and the attitude of the institutions and the public to the Bulgarian cultural heritage with regards to its identity, on the one hand, and as part of the dialogue between civilizations, on the other. The discussion is based on the "case studies" approach, and the content analysis makes use of twelve quantitative and qualitative indices that can be described a s follows: the six quantitative indices are frequency of occurrence, location on the page, nature of headline, genre, author, illustrations. The qualitative parameters cover thematic accent, object of

criticism, media stylistics, media stereotypes, institutional stereotypes, and effect on the audiences. The empirical material is extracted from publications in 9 dailies and 3 weeklies for a five-year period (covering 2007-2011). The case studies are classified thematically and the following four major types of institutional and communicative deficits can be delineated:

The first one consists of shocking encroachments on archeological findings and territories as a result of investors' interests and media passivity. The second is connected with the media model of representation of the success of Bulgarian artists, musicians, scholars and scientists in international projects, as for example the achievement of Antoniy Christov (whose film studio won the Oscar for animation in 2009 for "Wall-E"), the Bulgarian expedition to the Antarctic region, or the participation of Bulgarian physicists in the building of the Large Hadron Collider (LHC). The third one refers to the public debate about the atrophy of the cultural traditions as a specific manifestation of the lack of dialogue between civilizations. While the fourth is related to the scanty funds allocated for the preservation of our cultural memory and the lack of adequate institutional and media policies in this sphere. I shall dwell in greater detail on the first aspect, since the volume of its coverage is the most impressive. In quantitative terms the other three have an almost symbolic presence in the Bulgarian press because they account for only about one third of the case studies and their discussion of the topic of community togetherness and of a Bulgarian identity is almost only hinted.

Institutional and media lack of responsibility concerning our cultural heritage

The empirical evidence related to this group of case studies consists of 1060 publications discussing the institutional inertness in the case of a number of absurd scandals related to:/a/ the new plan of the town of Sozopol, which in fact changes the ancient town; /b/ the danger for the town of Nesseber to lose its status of a UNESCO cultural monument; /c/ the ruining of the remains of the Roman amphitheatre and a number of other important buildings in the capital city of Sofia, the demolition of which deprives us of the right to proclaim the city centre as a complex archeological monument, and /d/ the fate of a number of other archeological sites and the ineffectiveness of our national policy concerning our cultural heritage. This segment comprises two thirds of the material under study, but the quantitative parameter does not compensate the uncritical, insipid comment of one or another scandal. The analysis of the material reveals the specificity of the media coverage of these events, namely, that the journalists are in the grip of a certain inertia that leads to the underestimation of these problems.

The topic about the architectural mutilation of historically authentic towns – such as the town of Sozopol, for example,has a very low incidence of coverage by the media, and that only under titles such as "A new plan re-tailors Sozopol". The problem about the illegal construction of buildings not only in

Sozopol but in other historically important settlements such as the old town of Nesseber (with about 90 illegally erected buildings), the Arbanassi hamlet, the town of Koprivshtitza and many other, is simply avoided. On top of all, there has been an attempt to represent the problem about the danger of deleting the old town of Nesseber from UNESCO's list of places of the world's cultural heritage as a local intrigue, a fact which reveals an attempt – on the part of both state institutions and media - to soothe their conscience. Texts about protected territories appear rather sporadically, usually at the beginning of the summer tourist season, otherwise their fate seems to be beyond the critical eyes of the journalists.

The same passive media attitude can be observed with regards to the cases of destruction of valuable archeological findings such as the Roman amphitheatre in Sofia, uncovered in 2005. The public discussion of this fact is reduced only to titles such as "Another hotel on top of a Sofia amphitheatre". The problem deserves a more critical discussion because, to my knowledge, few are the capital cities in the world that can boast of ruins of a Roman amphitheatre in their very centre, ruins which can be transformed into a tourist attraction. There is also very little discussion of the architectural monstrosities committed in the last few years, a problem that is highly relevant to the issue of cultural heritage.

The next thematic accent in this group of case studies is related to the impotence of the municipal leading bodies to make it an obligation of all owners of old buildings recognized as architectural monuments, to keep them in good repair, in spite of the sanctions envisaged in the law (The Cultural Monuments Act). The media stylistics in these cases boils down to headlines such as "A Ghost House Gives the Creeps to Sofiotes", "Fingov's house is on the demolition list", etc. What is actually happening to old architectural monuments remains outside the scope of vision of both the institutions, the media and the public eye. Rather timid is also the public discussion of the problems related to the construction of business buildings, which deprives the historical centre of the city of Sofia of the chance to be proclaimed as a collective UNESCO cultural monument.

We can use the label of "archeological summer" to identify the fourth thematic line in this group of case studies. It is usually in the summer that digging is going on at more than 300 archeological sites: but you will never find that many materials in the media, irrespective of the fact that work is going on at a number of interesting places such as for example the Kozarnika Cave. And the results of the archeologists' findings are really impressive, for they change our views concerning the route traversed by the first human beings in Africa towards Europe, namely, that it went across the Balkans. At "The Younatzite" settlement mound there have been uncovered structures that can be considered as witnessing the process of the formation of city life in Europe. Unfortunately, however, very little is done for their popularization, as is also the case with the rich undersea heritage found on the bottom of the Black Sea. Neglected is also the fact that American scholars are now trying to explore the Black Sea in their search for Atlantida, following

the traces of the world deluge described in the Bible. The aim of the expedition is to find support to a hypothesis that the most ancient civilization on our lands provided the beginnings of the Sumer civilization, and later on – of the Egyptian civilization. Such a perspective in the discussion of the work of the archeologists does not seem to provoke the interest of the respective institutions or the media; nobody comments, for example on the fact that –due to the crisis – the initially planned means allotted for such work have been cut by a third.

The problem of the scanty financing of archeological work, of the fact that archeologists try to find funding for their projects from abroad (projects which are usually buried into oblivion after the digging is over) does not seem to enjoy the attention of the media. It is probably due to lack of experience in provoking a public discussion about, for example, the fact that Macedonia allots 32 million euros for the preservation of its cultural heritage, while the sum Bulgaria has provided is only 4 million levs (that is 2 million euros). Incidentally there appears the problem of what should be done to protect our cultural heritage from the encroachments of treasure-hunters. Now and then some of the media timidly raise the problem about the necessity, on the part of the relevant institutions, to examine the origin of the private collections of antique objects, icons and pictures. Journalists often play the role of passive observers to what is happening to the Bulgarian cultural heritage, plundered in many and unknown ways. There is lack of institutional and public intolerance to such phenomena.

The systematization of the material extracted from the case studies makes it possible to suggest that we are witnessing the phenomenon of INSTITUTIONAL AND MEDIA CIVILIZATIONAL APATHY. The extremely rich and varied cultural heritage from various historical periods does not seem to be appropriately valued as an important element of the formation of our national identity, for provoking an enhancement of our national and regional self-confidence and for promoting Bulgaria and the Balkans as the cradle of European civilization. What we are witnessing instead is a dull and unperceiving professional insensitivity. What strikes the analyst is the rather even and monotonous way of writing, which is difficult to explain when compared to the otherwise sharp aggressiveness found in the discussion of other problems.

What we deem as imperatively necessary is a more sensitive professional reflex and a deeper understanding of our socio-cultural identity; there is the need of new institutional and media models of public speaking about our cultural heritage. Such a conclusion seems to be applicable with regards to another aspect of cultural identity, namely, the problem of running the tourist business as part of the understanding of globalization. A significant institutional and media deficit can be also observed with regards to the popularization of interesting tourist targets and destinations, such as for example the museum of the rose, that of yoghurt, etc. Both state institutions and media seem to consider this topic as out of fashion; there are, for example, journalistic materials that contain hints about museums as institutes that

smell of mothballs, that is, of naphthalene; it is true that there have been organized a number of polls concerning visiting museums, but the major questions raised in them are of the sort "Why visiting museums is so boring and tedious?", or "Why people don't go to museums?", that is, with a major question that may contribute to the formation of a negative attitude to such pastimes. The attacks of the journalists remain on the level of conclusions and inferences. There are no genuine professional attempts to formulate these issues as part of the problem of the sustenance and safeguarding of our national memory and specific culture within a global society.

All these facts reveal serious deformations in the institutional and media understanding of the notion of identity. This problem is intimately related to the next one, namely, that of the phenomenon of an ANEMIC NATIONAL SELF-CONFIDENCE.

The systematization of the empirical material makes it possible to draw the conclusion that there is the imposition of two media socio-models: the first can be described as a substitution of identity and the second, as the stereotype of castigation.

This leads us to another communicational problem, namely, to the interpretation of the conflicts and their media framing, that is, about what is it that the media write about and how. If we take Goffman's thesis about the framing of the conflict repertoire, what strikes as a specific feature of the Bulgarian media now is the strong tendency towards an unprincipled selection, as a result of which in fact they create another, a second "reality". We have been often witnesses of the way the media keep silence about important problems concerning our cultural heritage, for example, and a re-focussing on less significant events, which distorts the real picture. As a result what we see is a deformation of the functions of journalism, due to either economic censorship or to auto-censorship, as a result of professional deficits.

What sounds most alarming in the analysis of the materials is that the media do not seem to notice the following three extremely important aspects: the first is related to the crisis in the field of intellectuality and the results from it. The second problem which the media do not seem to understand correctly is that the preservation and development of cultural diversity makes the achievement of our national goals more easily attainable. And the third one refers to the fact that serious shortages of financial means need alternative financial mechanisms.

One can delineate a few more negative tendencies, for example, the passivity of the journalists and the campaign sort of style of working by fits and starts, and the frequent cases of serious substitutions and surrogate thinking concerning media resonance and the dynamics of cultural heritage as a kind of social thinking and as the most essential aspect of the functions of journalism. But these will be discussed in a more detailed version of the present paper.

Major conclusions

May we therefore suggest that there is the necessity to adopt a different media approach, an approach that will result in a more civilized social dialogue, a dialogue that may lead to a social change which will improve the ability of society to improve the management of our cultural heritage, to work out its cultural policies and media effect as part of our strategy to affiliate ourselves with the rest of the world. A positive social change in the direction discussed above can be attained if we take into account the following major conclusions to be drawn from the analysis of our material:

1. The problem of the interconnection between globalization and our national cultural specificity should be part of our daily programme, a constant concern of both the institutions and the media.
2. The solution of these problems should become a constant point on the agenda of the relevant institutions, the media and society as a whole; it should be in the centre of the public debate, where different points of view can be expressed, irrespective of the clashes that may emerge between irreconcilable, at first glance, views and tendencies.
3. All this requires an elaborate institutional and media policy concerning the preservation of our cultural specificity as an element in the formation of a national and regional self-consciousness with a view to the role it can play in the process of globalization.
4. The theoretical tradition, known as a culture-based approach to the explanation of social changes, lays stress on the important role that cultural factors play in social development. We can quote at least some of them here, for example Max Weber's theory about the importance of cultural tradition and its role in modernization and economic growth (Weber, 2004); the theories about the type of civilization to which a society belongs (Huntington, 2006); about the effect of political culture (Almond,Verba,1998), the theories about the social capital and confidence, etc., etc. A comparison of the societies going through a transitional period during the last twenty years PROVES THE VALIDITY of these theories. The countries from the Eastern bloc started reforming their systems – which were more or less the same – or at least very similar in terms of their economic systems, political structure and ideological framework, but after two decades of democracy their achievements **are not the same**. A fact which may – to a certain extent-be explained with the mentality and the cultural identity of the people and the media coverage of these dimensions. The narrower they are, the more difficult is the European and global adaptation. Nations with a clearly proclaimed national identity and self-confidence can more easily globalize and become part of our common home– our planet Earth. Nations that have problems with their cultural identification and national self-consciousness will feel more isolated in the process of European and global integration.

References

1. Almond, G. A., Verba S. (1998) The civic culture. Sofia: P.H. GAL-ICO.
2. Goffman, Erving (1974)Frame analysis: An essay on the organization of experience. London: Harper and Row.
3. Huntington,Samuel P.(2006) The Clash of Civilizations and the remaking of world order. V. Tarnovo: P.H. Obsidian.
4. Robertson, R. (2004) Glocalization: Time-Space and Homogeneity-Heterogeneity.In: M.Featherstone, S.Lash, and R. Robertson (eds.), *Global Modernities.* Sofia: P.H. Criticism and Humanism.
5. Semov, M. (2004) Globalization and National Destiny, Clash of interests-intelligence, Sofia: P.H. Macedonia Press.
6. Weber, M. (2004) Die protestantische Ethik und der 'Geist' des Kapitalismus. Sofia: P.H. Prosveta.

THE TOPICALITY OF SOCIAL MARKET ECONOMY IN TIME OR GLOBALIZATION (POSSIBILITIES AND LIMITS OF ECONOMIC AND SOCIAL POLICY)[22]

Lisý Ján, prof. Ing. PhD.
University of Economics in Bratislava, Faculty of National Economy,
Department of Economics
Dolnozemská cesta 1, 852 35 Bratislava
email: jan.lisy@euba.sk

Abstract. The model of social market economy represents one alternative for market economy functioning. This model is based on traditional Christian ideas and values and these are typically linked with the free initiative and activity of individuals and social solidarity. The efficiency and prosperity of the market economy are based on fulfilling social goals. The state assumes the responsibility just in case that individual or market structure fails. State actions in the social area should be consistent with the market to develop the market economy instead threatening it. Neoliberals are enforcing the minimalization of state intervention. They concede that the state should be active in the optimalization of macroeconomic proportions, the macroeconomic cycle and inflation regulation. It should emphases optimal economical growth and optimal income redistribution .The state should protect, support and develop competition and restrict monopolies.
Key words: neoliberalism, ideal kind of economy, model of social market economy, ordoliberalism, competition and monopoly

Introduction

Model of social market economy represents one of the alternative ways of functioning of an economy which was realised after World War II in western Germany and some Scandinavian countries. Several transforming economies including Slovakia have been inspired by its basic principles. Under the conditions of globalization, its characteristic features significantly influence dynamics of socio-economic process in our country and abroad. Model of social market economy is based on theoretical concepts and policy ideas of neoliberalism. Initially, neoliberalism was not paid much attention even by economic science mainly because of dominant position of Keynesianism in 50s and 60s. Neoliberal theoretical concept evolved, improved and adapted to policy needs. Influence of neoliberalism on socio-economic thinking in 70s and 80s was evident. Renaissance of liberal and conservative concepts took place in every area of social and economic life. We know by experience that rise or fall of interest in neoliberalism is closely related with the tendencies of development of market economy even under the conditions of globalization of current world economy.

„Even if it seemed that freedom and equality of people are politically and legally ensured, industrial workers were not economically and socially free. There were dependent and felt that they are subject to domination of 'capital'. Bad living conditions, insufficient wages and other

[22] This paper was elaborated with the support of VEGA project grant scheme no.1/0561/09

compensations, long working hours, health damage, children work and existential insecurity […] represented social questions of those times. […] Conflicts have remained, insecurity mainly in the periods of crisis threatened workers […] what threatened new social question. New problem has appeared: insecurity in the form of long-term unemployment. […] This new social question is not the question only of industrial workers, but it is related to all employments. Everybody is threatened by this development. […] Nowadays, social question is not of private character what corresponds to the fact that private character of life is gradually disappearing." (Eucken, 2004, p.258-261).

Social market economy is a system in which economic freedom is united with social certitude. This model is based on ordo-theory of Freiburg school of neoliberalism in Germany. According to W. Eucken, notion of capitalism does not characterise the essence of western economy. Therefore, neoliberals proposed to substitute term capitalism by new, neutral and not deformed term. They proposed to denote economy of FRG by eloquent term 'social market economy'. Model of social market economy has been practically realized mainly by Ludwig Erhard, the first after-war western German Secretary for Economy Affaires.

According to neoliberals, social market economy is such social and economic order which unifies economic and social certitude. According to neoliberals, notion of social economic economy is deeply embedded in spiritual history of European Christianity in which individual has right to human dignity and free development of his/her personality. Neoliberals understand social market economy as a system based on traditional values and ideas for which unification of free initiative and activity of individual and social solidarity is typical. Social market economy is based on securing and protection of individual liberty. "State has to be subordinate to law. […] Because of that it has to respect and protect area of liberty of its inhabitants in two ways: against compulsive power of state administrative authorities which have in entire history more or less tendency to violate personal liberty allegedly in public interest, and at the same time against mutual endangering of inhabitants. Idea of rule of law as opposed to compulsory power of state is permanent."[23]

Model of social market economy is characterised by principles of individuality, solidarity and subsidiary. According to Erhard, personal responsibility should go above all. It results from the essence of individual freedom. Political and economic order has to provide individual freedom. Principle of solidarity means that individual has right to free choice and decision making in pursue

[23] Eucken, p. 102 - 103

of his/her economic interests, on the other hand he/she respects principle of solidarity which expresses mutual interdependence and responsibility of people. Solidarity means that people are existentially connected together to each other and because of that they have mutual responsibility. It also means that in resolving of mutual conflicts, interests of individuals cannot be violated.

However, unification of individual economic interests and solidarity is not automatic. It comes into existence by the help of the principle of subsidiarity, which protects freedom and rights of an individual. Individual by his own initiative, creativity and responsibility can develop all areas of life, while state interferes only in the extent which does not deprive individual of this responsibility. State takes over only these tasks which are beyond the possibilities of an individual.

Principle of subsidiarity is an essential part of the model of social market economy. Efficiency and prosperity as a result of working of a market economy are necessary basis for achieving social goals. Social responsibility has to be based on individuals and family who in the extent of their free choice take care of the maximum of their needs by their own. State takes over responsibility only in the case of failure of individual and market structures. Every measure taken by the state in the social field has to be in conformity with market and cannot threaten but has to strengthen market economy. Furthermore, social policy of the state cannot threaten and limit freedom of an individual, his/her creativity, initiative and entrepreneurship. Market economy is in its essence social because it leads to efficiency and prosperity.

Mechanism of functioning of the model of social market economy

Functioning of social market economy is to be secured by these conditions and assumptions: inviolability of private property, competition free from monopolies, restricted functions of state and social system, free pricing and monetary stability.

i) Protection of private property

Private property is basic condition of functioning of competitive market system because it creates conditions for free competition and free pricing as well as for independence of entrepreneurs and their responsibility for profits. Claim that private property benefits not only the proprietor but also non-proprietor is valid only within free competition. This results from the fact that different proprietors compete with each other and persons searching for employment have more opportunities and are not unilaterally dependent.

Private property being condition for effective competitive market system, this competitive market system creates conditions for private property not to bring economic and social negatives. Therefore, liberals consider protection of competition and private property to be one of the most important functions of the state. “Only competitive order will make private property within modern,

industrialized economy sustainably bearable. Private property is on the other hand the condition for free state and social order."[24]

ii) Competition and monopoly

Eucken warns us that if private property is realized in the form of monopoly, it can lead to great damage, because competition is absent. In this case, state can limit the scope in which monopoly can use private property.

Under the conditions of free competition, large number of producers operates on the market and their actions are not restricted. If partial monopoly or oligopoly operates in the economy, it decreases the number of market subjects and their actions are restricted. By partial monopoly, Eucken understands domination of one producer on the market, where other producers operate. By monopoly, he understands situation of the single producer on the market. As it is very rare to find only one producer on the market, neoliberals consider monopoly to be an exception. Therefore, negative attitude to monopoly is characteristic for them. This shows itself in their request to keep competition free from monopoly. According to Eucken, monopolies eliminate competition what contradicts the essence of private property and free economy. However, he did not admit the possibility of nationalizing monopolies; he proposed regulation run by state authorities. Neoliberals consider competition and monopolies as two contradictionary phenomena. It is a function of state to protect and support competition. According to L. Erdhard, prosperity for everyone and prosperity through competition are inseparable. Competition is the essence of market economy. Social meaning of market economy consists in the fact, that profit or advantage that stems from rationalization or productivity rise should benefit everyone. Competition has its social dimension. Prices fall in competitive environment what enables larger and larger number of people to have their share on consumption.

According to neoliberals, to protect and support competition is one of the most important functions of the state Because of that, they propose to establish an institution for protection of competition and ensure keeping the rules of competition and punish breaking of the rules. Eucken claims that "it is beyond the possibilities of modern state to efficiently regulate monopolies within the economic order, where great fractions of industry are turned into monopoly. Political influence of interest groups is too strong. [...] State monopolies usually behave in the same way as private monopolies. Nationalization of monopolies or control of the monopolies is not the solution.

[24] Ibid, p. 361.

Regulation of the monopolies should be left to state institution for regulation of the monopolies. Antimonopoly office is as necessary as the highest court.

iii) Role of the state, income redistribution and social system

Neoliberals advocate the least possible amount of state interventions. They admit that state should attempt to create optimal macroeconomic conditions, to regulate economic cycle and inflation, to set needed and real rate of economic growth and within the possibilities of market system to attempt to optimal redistribution of incomes and protection and development of competition. By these activities, state should ensure free pricing and economic equilibrium. According to German neoliberals, Bismarck's system of social insurance should be the basis of social system. Eucken stresses that question of redistribution can become economic problem if proportion of redistribution is not set according to scarcity but according to the position of power on the market.

According to neoliberals, economic functions of the state have to be focused on the support existing forms of organization of economy, not on the control of particular processes. The sources of the state functions cannot interfere with market forces. State should regulate market system mainly by the instruments of monetary and credit policy. State takes over only these functions which are beyond the possibilities of individual or firm. According to Eucken, individual usually asks: "Why is my income lower than that of my neighbour? Cannot I earn more? These are for most people the most important functions of economic policy. If worker loses his/her job during the economic crisis, he/she focuses on the need of economic certitude. He/she wants to get suitable wage. For most people, primal economic problem is the problem of redistribution. [...] Redistribution policy is the essential part of economic policy. [...] Without the necessary liberties, it is not possible to solve social question. State should limit its functions to regulation and potential creation of the forms, in which economic process takes place, within the market including labour market, there has to be freedom. This is the goal."[25]

Stability of monetary system and social certitude

Another feature of social market economy is stability of monetary circulation which according to neoliberals should be ensured by monetary and credit policy. Instruments of monetary and credit policy should create conditions for normal functioning of the competition, free pricing, economic equilibrium and thus also create conditions for social certitude. According to Eucken, all attempts to functioning of competition are useless, if stability of the value of money is not ensured.

[25] Ibid p. 57-57, 263.

For competitive system (order), monetary policy is primal. "However, good monetary system should be construed in such way, that value of money is kept as stable as possible. Furthermore, it should meet another requirement, […] if possible, it should work automatically, or it will be abused to inflation.[26]

Eucken considers inflation to be very dangerous because it violates the principles of economic order, decreases purchasing power of money, unjustly redistributes incomes between people and thus deepens income and wealth differentiation between people. According to Alfred Müller-Armack, it can help totalitarian systems to emerge.

Monetary and price stability is one of the most important features of social market economy. It is an important precondition for sufficient amount of private savings to ensure economic growth. Monetary and price stability is best incentive to save. According to L. Erhard, good social policy requires stable value of money. On the other hand, high inflation leads to bad redistribution. Under the condition of inflation redistribution benefits these, who have lots of economic sources and possibilities to invest into real estate.

Neoliberals refuse inflation and in this respect criticize Keynesians, especially their policy of deficit funding and full employment which causes inflation. Their advocate active balance of payment which has to ensure stable monetary circulation in domestic economy. Neoliberals argue against political influences in regulation of amount of money in circulation and this is why they ask for independence of central bank.

Conclusions

1. Theoretical model of social market economy is based on spiritual values characterised by principles of individuality, solidarity and subsidiary. This creates conditions for personal and economic freedom and social certitude of people and efficient functioning of economic order. During the following periods, this model has been dynamically developing.
2. Our present experiences and practical knowledge warn that theoretical conclusions are prone to misuse and misinterpretation. As W. Eucken warns, "thinking of the mass is influenced by propaganda of political and economic parties. Powerful groups and ideologies are publicly confronted and they fill people's heads with propagandistic mottos. Many people are into the trail of the mass. However, mass thinks in collectivistic terms and is without initiative, it loves myth, not ratio."

[26] Ibid, p. 339-341.

3. The attempts for inadequate state interventions which undermine freedom of an individual, his initiative and activity as well as market competitions can be observed even now.

References

1. Baláž, P. – Verček, P.: Globalizácia a nová ekonomika. Bratislava, Sprint, 2002
2. Eucken, W.: Zásady hospodářského řádu. Prague, Liberální institut, 2004
3. Eucken, W.: Die Grundlagen der Nationalökonomie. Berlin, Springer- Verlag, 1989
4. Klusoň, V. : Ordoliberalizmus a hospodářska politika, Politická ekonomie, 1988, č. 3
5. Smith, A.: Pojednání o podstatě a původu bohatství národů. Praha, Liberální institut, 2001
6. Sojka, M.: Dejiny ekonomických teórií, Prague, 2010
7. Šulc, Z.: Stát a ekonomika. Prague: Karolinum, 2004

LOCAL DEVELOPMENT – MULTIPLE VIEWS

MÍSTNÍ ROZVOJ – RŮZNÉ POHLEDY

Ing. Maříková Pavlína, Ing. Herová Irena

Department of Humanities, Faculty of Economics and Management,
Czech University of Life Sciences Prague
Kamýcká 129, 165 21 Praha 6 – Suchdol
marikova@pef.czu.cz, herova@pef.czu.cz

Abstract. Local development can be assessed by monitoring changes and their impacts on local community. Primarily positive changes bringing profit are considered as development. However, this profit does not have to be economical. It should rather be the increase in life quality of the inhabitants. Several studies show that if the impulse for a change comes from within the community, this change tends to bring positive impacts and development of the locality. Exogenous development more often leads to no only positive impacts.

In this report, we review the theoretic description of local development and its manifestations and seek ways how to measure this development. We present a simple indicator of total municipality development and show the limits of its use. In the second part, we summarize findings from our research focused on subjective notions of development and its evaluation.

It becomes clear that in the minds of local actors (predominantly mayors of rural municipalities) as well as other rural inhabitants development means above all material and palpable values such as construction of technical infrastructure. Only small part of respondents perceives development as social process, connected with relations between inhabitants and their common aims.

Key words: rural area, indicator of development, local development, endogenous development

Introduction

To begin with, it is necessary to state basic concepts. Local development is a very important part of general development. Every locality, whether municipality or another area, develops in time, it changes structure, features, character. These changes can have many forms. The term development is understood usually as positive changes that bring growth, benefit or higher quality of life. This determination has, however, its difficulty – not all effects have to be positive for all actors. In many situations good change for one group of people means bad change for another. It is necessary to analyse and eliminate all possible negative results of changes in the process of planning developmental strategies.

The term "development" is used very often but its exact definition is difficult to find in expert literature. The term is usually completed with an adjective of the area – regional, rural, local. This paper does not deal with economic or urban development.

In the concepts of regional development, two approaches can be distinguished – exogenous and endogenous. In the first case, the change comes out from outside, in the second from the inside. Combination of both approaches is involved in the Integrated endogenous regional development

strategy (IERD) that covers up economic, social, political, cultural, ecological and other part of development. Similarly we can talk about rural or local development, that blend together. *Regional development has territorial principle and it is based on local conditions*. (Jehle, 1998)

Objective content of regional or rural development can be found in programming documents (Strategy of Regional Development, Program of Rural Development, etc.) but particular shape of the development is created by the inhabitants of each individual locality. It means that they use mainly endogenous approach to local development. Jehle said: *Endogenous development means that the local population can decide about its own development.* (Jehle, 1998) It is the reason way this type of development is difficult to monitor.

Data and Methodology

At first it was important to determine the concept "local". Usually it is considered as spatial terminate. In Czech as well as in English language many ambiguous synonyms exist (local, territorial, municipal, etc.). For example, the name of the Ministry of Local Development is necessary to translate to the Czech language in a different way, because the term "local" has more meanings. In some cases it is possible to interchange the terms local and regional (more in Coffey, Polèse, 1984), but more often the space of locality is considered smaller unit than a region. A locality can also imply a micro-region when demonstration an even smaller area. In Czech conditions is the term local the expression for the area of municipality. The settlement structure of the Czech Republic is very scattered, which is quite unique in Europe. There are many independent municipalities with lower average number of inhabitants than 2 thousand (almost 90 % of all Czech municipalities). (Maříková 2007) When we discus local development in this paper, we have in mind the development of municipalities mostly in rural area (more in Summers, 1986). Consequently, there is an interconnection between rural and local development.

The next important issue is how to monitor or measure development, and which indicator to use. Geography considers number of inhabitants and location of municipality within a region as key factors of rural development, sociology rather emphasises human factor – social capital. In the view of statistical monitoring the measure of local development is little bit complicated. On the level of locality (municipality), most available data has been collected in the frame of Population and Housing Census in periodic decade intervals. The only annually registered indicators are number of inhabitants and their movement. This demographic data indicate if new inhabitants come to the village and how many children were born in the year. Increase of inhabitants could be interpreted as a successful development of municipality and vice versa. However, it is a very rough indicator and

the interpretation has its limitations. As well as the definitions of development have their dilemma – it is possible, for example, t o consider the build-up of developer project in a suburban village as a successful development of locality? Is it the positive way how to improve quality of life of local inhabitants?

If we perceive development as a complex process of improvement of quality of life in all aspects, it is very difficult to find simple criteria. Which indicator is able to involve all components of total development, from social to financial or ecological? The proposal of solution is outlined in the conclusion of this paper.

After finding the way of measuring development it is necessary to answer the question: what does "local development" mean. We need to monitor its symptoms on local level, but for this purpose the statistical data are not suitable, sociological data are needed.

Therefore, we used data from previous research projects of the Sociological Laboratory as well as other sources. Although most of them were not focused exactly on problems of local development, they can indicate at least a frame of perception of development in various consequences. Individual packets of data (the source of primary data will be described in next text) differ not only in sample of respondents and period of process (2003-2010) but also shape of question. Predominantly we analysed differences in answers to open and closed questions. Not always the researchers have similar view on development of the region as the respondents and the formulation of questionnaire can limit extend of expression.

Results

First sets of data show possibilities of development as expressed by mayors of villages in 2003. In correspondence questionnaire survey chosen representatives of rural municipalities (i.e. till 2 000 inhabitants) was answered questions on development in their municipality. (Majerová, 2003) The following table summarizes the answers of 1311 respondents to the half-opened question: "What are the main possibilities of development of your village?" with following priorities (each could mark 3 out of 9 options).

Table 1. Development activities

Order	Development activities	Rate of positive answers in %
1.	Housing	75,67
2.	Entrepreneurship	45,31
3.	Agriculture	36,61
4.	Recreation	36,00
5.	Tourism	33,03
6.	Environment protection	24,79

7.	Travelling	20,06
8.	Other	3,97
9.	Local product	1,37

Source: Research Characteristic of village, realisation Sociological laboratory + STEM, 2003, used technique - questionnaire survey (half-opened question), 1311 respondents – mayors of villages

For completion and view of "the other side" we can compare with a similar question [6] that was given to inhabitants of the same villages: "What should be done for village development in the future?" with 8 possibilities to answer. In this case set of dichotomous (yes or no) question was used. Following table shows the rates of positive answers.

Table 2. Development in future

Order	**Development in future**	**Rate of positive answers in %**
1.	Landscape protection, ecology	88,62
2.	Support of entrepreneurship	87,82
3.	Building of new housing	82,25
4.	Improvement of infrastructure (water-supply, sewage, gas pipe, etc.)	74,24
5.	Transport ability	74,24
6.	Support of agriculture	69,09
7.	Tourism, recreation, agro-tourism	67,38
8.	Other	10,16

Source: Research Characteristic of village, realisation Sociological laboratory + STEM, 2003, used technique - questionnaire survey face–to face (block of dichotomy questions), 1634 respondents – rural inhabitants

A survey carried out two years later in rural area, could help to show changes of opinion in time. Previous question was little bit modified. (Majerová, 2007) Block of 12 suggestions followed the question:"What, in your opinion, could help to develop your village in the future?". The respondents- inhabitants could express their opinion in four steps scale (certainly yes - rather yes - rather no - certainly no) and possibility their own expression. Results can be seen in the table 3.

Table 3. Development of village in future

Order	**Development of village in future**	**Certainly yes**	**Rather yes**	**Total rate of positive answers in %**
1.	Improvement of traffic	981	765	86,56
2.	Support of entrepreneurship	869	864	85,92
3.	Building of new housing	868	761	80,76

4.	Improvement of public facilities i.e. school, post office, shops, etc.	743	861	79,52
5.	Support of local traditions, habits and culture	630	963	78,98
6.	Landscape protection, ecology	611	978	78,78
7.	Tourism, recreation, agro-tourism	695	872	77,69
8.	Foreign investment	708	849	77,19
9.	Support of agriculture	623	838	72,43
10.	Improvement of infrastructure (water-supply, sewage, gas pipe, etc.)	582	808	68,91
11.	Cross-border, regional and inter-municipal cooperation	368	870	61,38
12.	Fusion with another village	118	282	19,83
13.	Other	89	53	7,04

Source: Research Life strategy of rural inhabitants, realisation Sociological laboratory + STEM, 2005, used technique - questionnaire survey face–to face, 2017 respondents – rural inhabitants

Broader approach to this topic was used by M. Sobotka in his PhD. Thesis (Sobotka, 2009). He addressed mayors of chosen region (Pardubice region) to fill in his questionnaire with the question: "Which problems are priorities in planning of development of your village?" He offered 24 possible parts of development that respondents evaluated on the scale from 1 to 10 (from not important to very important). From 115 filed questionnaires he gained following results: *"...the most important activities supporting local development in villages of all size categories were identified by the respondents as maintenance of public space, reconstruction of traffic communications, pavements, security, building and modernisation of infrastructure, support of local culture activities and in larger villages also care for historical heritage."* (Sobotka, 2009)

In the survey of the Faculty of Science of the Charles University, two differently formulated questions were used for indication of rural development. They asked the local authorities of municipalities wit up to 3 thousand inhabitants what they consider the most important condition for successful village and the most important indicator of the successful. If we take success as a synonym to development we can to include the result of this survey to analysis. The respondent had to choose one of offered possibilities (condition, indicator). Two fifths of respondents chose the willingness of inhabitants to meet and cooperate on solving problems as the most important condition of success. 20 % obviously consider themselves as the condition for success as they chose "able mayor in the town hall". Others voted their ability to "acquire funds for projects. On the fourth place is also financial factor, even if indirectly – "enough young people willing to live in rural area" (municipalities acquire subsidies according to number of inhabitants). On the other hand

mostly developed infrastructure (32 %) is regarded as the indicator of successful municipality. Second are good relation of inhabitants to village (24 %) and a mayor that is able to acquire enough financial sources for village (17 %). The criterion mentioned above – increase of number of inhabitants – was used in this study also. It was regarded as an indicator of successful village by 11 % of mayors - respondents. (Chromý, Marada, Jančák, Havlíček, 2010)

The subject of rural development was also analyzed in the survey counselling for rural development with the use of several techniques. Two focus groups were carried out with the representatives of public life in rural localities. They answered the question: "What is the fist thing that comes to your mind when you hear the expression "development of your village"? Their ideas are possible to summarize as following: a) Spontaneously, the respondents connected development of their village primarily with the improvement of infrastructure, broader offer of jobs, protection of environment, renovation of old houses, better services, maintenance and modernisation of schools, renovation and building of sport places and resorts for recreation; b) All of them connected rural development with creation of new jobs, keeping young people in rural areas, maintenance of agriculture and nice environment.

Source: Research Advisory for rural development, realisation Sociological laboratory for Ministry of Agriculture, 2006, used technique – focus group, 20 respondents – rural actors

At the end we would like to present preliminary results from research called Monitoring of Rural Development, which is still being conducted. This project is financed from the project called Multidisciplinary evaluation of impacts of special territorial protection for hydrological important areas (Multioborové hodnocení vlivů územní ochrany vodohospodářsky významných lokalit ČR). Possible influence of area protection on local development is studied in chosen groups of villages. Semi-standardised interviews with opened questions are carried out with representatives of local municipalities (mostly with mayors). Interviewer records the answers into prepared questionnaire form and at the same time the interview is recorded for further analysis. Possible alternatives of answers are prepared in the questionnaire form for easier further coding. The final version was tested on small sample of respondents from representatives of rural municipalities.

In the first part of the interview, respondents are asked about important developmental activities in their village in last 10 years. The results showed that the possible answers in the questionnaire form were proposed correctly. Most of the items are used, only in some cases the researcher has to add a few of them.

The developing activities are possible to divide into three parts: public facilities (reconstruction or building sport places, municipal buildings, facility for cultural and social life),

public places (local road networks, playground for children, street lights and green areas) and infrastructure (water, sewage and gas pipes, cable networks, etc.). To support tourism cycling lanes were more often build, orientation signs for tourists were improved and historical buildings reconstructed. Voluntary activities of inhabitants involved all of offered possibilities (renewal of old traditions, fundraisings, voluntary work and other independent activities).

On the other hand, when the respondents were asked the open question: "Could you describe the most important developing activities in last 10 years", without any offered possibility of answer and followed up the firs idea of respondent (the subject that respondent takes into mind as the most important). The most often the answers focused on improvement of technical infrastructure (water, sewage and gas pipe, sewage plant – new or renovation). Second group of developing activities (which was not in prepared form) were territorial plans and proposals for future projects. They were mentioned by one third of mayors. They also considered technical infrastructure for new housing projects as very important for development of their village and more then one forth remembered a play ground or other sport places. Only 15 % of representatives considered some initiatives of inhabitant as developing activity.

Source: Research: Multidisciplinary evaluation of impacts of special territorial protection for hydrological important areas, used technique – semi-standardised questionnaire, 39 respondents – mayors or their representatives of rural municipality

Conclusions

The objective of this paper was to outline problematic of local development from the point of view of local actors. It focused mostly on rural areas because the conditions in urban area are different. Seven different surveys that were carried out from 2003 till 2010 were used as a source of the data. With regard of the fact, that the surveys were not primarily focused on problems of local development and did not use the same formulation of questions, the comparison is not easy. Some questions were focussed on developing activities in the past, other on future development; they were focussed on priority or signs of success. Common characteristic all of them is limitation on one locality – municipality. Together the data can be used to describe some indicators that can measure the level of rural development.

1. We expected that in the opinion of actors of local development (mostly mayors) and other rural inhabitants the highest appreciation will be mostly given to material and visible objects, for example technical infrastructure. This hypothesis was confirmed. Our results show that local development (municipal) is most often connected with building of technical infrastructure, support of housing, entrepreneurship and improvement of public facilities.

Only small part of respondents perceived rural development as social process that is depended on people and their social aims. Only in one of example – the research from the Science Faculty Charles University was social factor on the first place of the priority list.

Based on this knowledge, we could propose some criteria for analysis of local development. If local development is expressed by the indicators that are so important for mayors (technical infrastructure, public facilities, housing and entrepreneurship) it would be quite easy to measure it by merely taking technical data on public facilities. However, these facilities have been monitored already and this data are not enough to testify the level of development. The public facilities or existence of pipes are signs of quality of life which is directly proportional to size of municipality, which is difficult to influence.

2. The development of housing is a better indicator but it can be replaced by monitoring of number of inhabitants. Still, it is not an indicator, which could be judged unambiguously as positive or negative. The indicator of number of entrepreneurs is similar. It is not clear that all of them bring benefit to their village.

How should development be monitored? One of possible the ways is to create system of "soft-indicators" based on consequences and impacts of development, for example on quality of life of inhabitants in locality. These indicators could involve not only material facilities in the village but also the perception of inhabitants, not only the number of entrepreneurs but also their benefit for village. These indicators would reflect social climate in the village that could be in ideal case real indicator of positive local development. One of definitions of local development states: *"Shared aims for all inhabitants have to exist for local development to be a really a positive change for the local inhabitants,."* (Bernard, 2010)

To find these indicators could be very difficult and even to more difficult to introduce them to praxis. However, even today, using existing indicators, we can find and define a group of rural municipalities that develop and the development is really complex.

3. These villages can be found in lists of villages applying for the competition Village of the Year that is organized every year by Ministry of Agriculture, Ministry for Regional Development, Association for Rural Renewal and Union of Towns and Municipalities of the Czech Republic. The aim of this competition is to appreciate good activities of villages, their representatives and inhabitants, whose effort is not only to improve their housing but also to keep local traditions and participate in social life in the village. Many criterions are evaluate: conceptual documents, social life, activities of inhabitants, entrepreneurships, of municipal facilities and promotion of the village, level of technical infrastructure, energy

safety, maintenance of public places, care for landscape, etc. The villages show with the application for this competition the positive way of development and their representatives motivate inhabitants to further activities. We can only wish to have more examples of successful villages like the winner of this competition.

Acknowledgements

This contribution was created with the support of the Ministry of Agriculture in the frame of the project Multidisciplinary evaluation of impacts of special territorial protection for hydrological important areas.

References

1. Bernard J.: Lokální rozvoj ve venkovských obcích – k lepšímu porozumění používaného pojmu. *SOCIOweb_02_2010*. ISSN 1214-1720
2. Coffey William J., Polèse Mario: The concept of local development: A stages model of endogenous regional growth. *Papers in Regional Science Volume 55 1984*. ISSN 1056-8190
3. Chromý, P., Marada, M., Jančák, V., Havlíček, T.: Venkov očima představitelů venkovských obcí: regionální rozdíly v Česku. *Geografie–Sborník ČGS, 115, č. 2*. ISSN 1212-0014
4. Jehle R.: The koncept of endogenous rural development in the framework of its introduction in the regional policy in the Czech Republic. *Zemědělská ekonomika 1998 44*. Praha 1998. ISSN 0139-570X
5. Kocmánková-Menšíková L.: The need of information and extension service for the countryside and ist development (the opinions of local actors). *Agricultural Economics 2008 54*. Praha 2008. ISSN 0139-570X
6. Majerová V. a kol.: *Český venkov 2003 – Situace před vstupem do EU*, PEF ČZU Praha 2003, ISBN 80-213-1121-5
7. Majerová V. a kol.: *Český venkov 2006 – Sociální mobilita a kvalita života venkovské populace*, PEF ČZU Praha 2007, ISBN 978-80-213-1631-7
8. Maříková P. Countryside in the Czech Republic – determination, criteria, borders. *Agricultural Economics 2007 53*. Praha 2007. ISSN 0139-570X
9. Sobotka M.: Majetek obcí a jeho vliv na rozvoj obce, *disertační práce*, Univerzita Pardubice, 2009
10. Summers Gene F.: Rural Community Development. *Annual Review of Sociology 1986 12*, ISSN 0360-0572

OPTIMUM CURRENCY AREA THEORY – A CRITICAL VIEW[27]

Eva Muchová, prof. Ing. PhD.
University of Economics in Bratislava
Dolnozemská cesta 1, 852 35 Bratislava
The Slovak Republic
eva.muchova@euba.sk
tel.: +421267291528

Abstract. The launching of monetary union in Europe, from a historic point of view, represents a completely new solution. It did not have a very strong background in economic theory. The paper deals with the theory of optimum currency area (OCA) as the theoretical basis for analyzing the advantages of membership in a monetary union. R. A. Mundell in his ground-breaking essay of 1961 opened up the issue of optimal currency areas and put the question of under what conditions it is advantageous for a group of countries to introduce a common currency. The project of EMU has raised questions and polemics among a professional public. The criteria of the optimum currency area together with real convergence play a key role in assessing preparedness to join the monetary union, as well as in evaluating the costs and benefits of membership in it. The criteria for an optimal currency area are not a black and white problem. Some of them may be partially met and others not at all. This paper deals with the polemic issues related to the theory of OCA, explores the development of OCA theory and analyses the arguments pro-and-cons of a monetary union and finally discuss the relation between a political union
and a monetary union.
Key-words: optimum currency area, criteria, R. Mundell, monetary union, political union, EMU

Introduction

Theory of optimum currency area (OCA) is the theoretical basis for analyzing the advantages of membership in a monetary union. This theory has been described as "wondrous doctrine which can often be the background for quite contradictory conclusions" (Dědek, 2002). Defenders of the common currency and critics as well refer to this theory. Theory of optimum currency areas allows to answer the questions: what are the conditions for the participation in the monetary integration, and then, what are the costs and benefits of joining to monetary union. The main cost of monetary integration is the inability to use an independent monetary policy to combat unexpected asymmetric shocks. As the main benefits of the single currency are identified: reduction of transaction costs, elimination of uncertainty of exchange rate developments, price transparency. The paper deals with the polemic issues related to the theory of optimum currency area. Section 1 deals with Robert Mundell´s contribution to the theory, section 2 explores the development of OCA theory, section 3 analyses the arguments pro-and-cons monetary union. Then section 4 analyses the relation between a political union and a monetary union.

[27]The paper was elaborated with the support of grant KEGA project no.295-027EU-4/2010 .

Robert Mundell and optimum currency area theory

R. A. Mundell in his ground-breaking essay of 1961[28] opened up the issue of optimal currency areas and put the question of under what conditions is advantageous for a group of countries to introduce a common currency. The work was published in a period when discussions on the advantages and disadvantages of a fixed and floating exchange rate were conducted mostly at the academic level and the national currency was considered as essential for a country.

R.A. Mundell (together with R.I. McKinnon and P. Kenen) belong to the most important economists dealing with OCA focused mainly on defining the criteria that determine the optimum currency area with a fixed exchange rate (see summary of theories Ishiyama, 1975). It should be noted that the OCA theory does not specify the exact critical values for each criteria. R.A. Mundell focused on the country's ability to adapt to the shift in the demand for products from the one country´s products for products of other country (Mundell, 1961). The result of this shift is the decline in output and employment negatively affected by a demand shock. In the case of monetary sovereignty (a country has had its own currency), a negative demand shock would be resolved through depreciation respectively currency devaluation. In the case of monetary union Mundell considers labor mobility as a factor that may restore macroeconomic balance.

According to Mundell´s original theory, the optimal currency area is an area where there is high mobility of factors. Mundell defines optimality as the ability to stabilize employment and price levels in the country (Mundell, 1968). In other words, if the economy manages to maintain external balance without an increase in unemployment or without an increase in inflation induced demand, the existing exchange rate regime (whether it is a floating or fixed) is considered as optimal. Based on the previous analysis Mundell concludes: if there is sufficient mobility of production factors within the country but low in relation to foreign countries, the national currencies, should operate effectively under floating exchange rates (Mundell, 1961).

In 1973 R. Mundell developed his original theory and analyzed the free movement of capital. The exchange rate stopped to be an effective instrument of monetary policy to stabilize the economy and on the contrary it has become a potential source of asymmetric shocks (Mundell, 1973). The countries that did not enter into monetary union, may become targets of destabilizing capital flows and will face asymmetric shocks. Therefore the exchange rate may not be effective to

[28] R. A. Mundell's article "A Theory of Optimum Currency Areas" in 1961 represents a classic in the theory of optimal currency areas. In: the American Economic Review, 60, no. 4 (September 1961), pp. 657-665.

eliminate the effects of such shocks. This theory is known as the Mundell II. Membership in EMU helps to insure against this type of asymmetric shocks.

The originality of Mundell's approach in formulating the problem influenced the work of further generations of economists, who consider the two case studies contained in his work (monetary union and a floating exchange rate regime) as the most important alternatives.

Development of the theory of optimum currency area

R. I. McKinnon (1963) proposed openness as a criterion of optimum currency area. Membership in a monetary union brings benefits from the integration of the country, higher openness leads to higher savings in transaction costs and greater benefits from the elimination of exchange rate volatility. Openness of the eurozone´s countries is relatively high (McKinnon, 1963).[29]

In 1969 P. B. Kenen suggests the degree of product diversification as a criterion for determining the fixed exchange rates. If the country produces and exports a diversified range of products, the negative impact of asymmetric shocks is smaller than in less diversified economy. In this case, it is not necessary to change in the exchange rate. The fixed exchange rates become more favorable if the product diversification increases. Countries that specialize in one sector are more vulnerable in case of asymmetric shocks. In the case of a demand shock an independent monetary policy would be an effective tool for solving problems in these countries.

J. M. Fleming pointed out that only countries with almost the same rate of inflation may enter and remain fixed exchange rates (Fleming, 1971). Different rates of inflation are the main cause of current account imbalances. The same rate of inflation between countries enables the maintenance of relative purchasing power parity and, consequently, leads to the stabilization of business conditions. In the long run the stable foreign trade relations lead to current account balance and the need to use the exchange rate change is minimized. If inflation diverges too much a system of fixed exchange rates between countries can not be maintained in the long-term. It means that a monetary union must undergo the steps towards convergence of inflation rates.

According to J.C. Ingram another criterion of optimum currency area is the integration of financial markets (Ingram, 1973). Capital flows from the relatively stable areas to the shock affected regions may replace a role of the nominal exchange rate (to some extent).

[29] Currently, a small open economy (under the existence of unrestricted capital mobility) has little manoeuvre room for the implementation of effective independent monetary policy. Independent monetary policy may become a source of shock and not just shock absorber (De Souza and Van Aarle, 2004).

The other criteria were proposed as follows: fiscal solidarity and homogeneity of preferences (Iša, Okáli 2008). Homogeneity of preferences means that there is a consensus accross monetary zone on the way how to react in case of negative developments. Fiscal solidarity may occur in the form of fiscal transfers. Summary of the criteria of optimum currency areas provide a study developed by Tavlas (1993) and Mongelli (2002).

Optimum currency area criteria was based on economic evaluation of costs and benefits, countries may decide to join a monetary union on the basis of political reasons, since the common currency may be a first step towards the creation of political union. As stress Baldwin, Wyplosz OCA are not black and white issue. Some may be partially met and others not at all (Baldwin, Wyplosz, 2008).

Mundell´s pro-and-cons monetary union

Mundell's theory of the optimal currency area was to become the starting point of controversies over the establishment of EMU, in particular in respect of researching the benefits and disbenefits of monetary union. Mundell considers a common currency as crucial for monetary union, where he identifies three phases in its achievement: introduction of a fixed exchange rate with a credible mechanism; setting binding rules for monetary policy; and the replacement of the domestic currency by the common currency of the monetary union (or partner countries).

In his latest works Mundell has again returned to a cost-benefit analysis of monetary union attempting a systematic definition of the arguments for and against joining a currency area (Mundell, 1997). According to Mundell, a country should consider membership of a currency union, or zone with fixed exchange rates for these reasons:

- If the country has an interest to maintain a rate of inflation different from the rate of inflation in the currency area;
- If the country wants to use the exchange rate as an instrument of employment for lowering or raising wages;
- If the country wants to use the exchange rate as an instrument for influencing the balance of trade (currency devaluation);
- If the country prefers to use monetary expansion for refinancing government expenditures (something which would be prevented by the required discipline in the conditions of fixed exchange rates);
- If the government is not willing to surrender segniorage as a means of international payment;

- If the regime of fixed exchange rates could clash with the policy of a central bank having a mandate to maintain price stability;
- If currency integration with many countries means the elimination of national sovereignty, which is a symbol of national independence;
- If there is not a political and economic elite available in the country capable of maintaining a system of fixed exchange rates in balance;
- If political authorities are not able to achieve a balanced budget and/or create confidence in a permanently balanced budget or in the viability of the fixed exchange rates;
- If the country is not willing to accept the degree of integration instituted by the agreement on the optimal currency area (e.g. common standards, immigration, tax legislation, labour law).

In a similar manner Mundell introduces the reasons that should support a country's decision on becoming a member of an optimal currency area:

- Adjustment of the set rate of inflation in the optimal currency area;
- A lowering of transaction costs in international trade;
- Elimination of expenses for the emission and maintenance of the national currency;
- The setting of a clear direction for economic policy around which the expectations of economic subjects may be formulated;
- The elimination of exchange rate movements;
- Ensuring the international softening of the negative impact of shocks;
- Greater participation in financial markets and the capital market of the union;
- The creation of a competitive currency as a certain counterbalance against the dollar;
- The creation of a larger economic bloc with the possibility of influencing international economic development;
- The creation of a mechanism for strengthening monetary and fiscal discipline outside the influence of the political process.

Political integration and monetary union

In the real world the currency is synonym for national sovereignty. The creation of a new monetary arrangements should be accompanied by political changes (Mundell, 1961). Optimum currency area is effective only in areas where there is political integration as well. The success of monetary union is also based on a common political consensus and sharing common priorities

relating to the given macroeconomic objectives such as: economic growth, unemployment, inflation. Political will to integrate is critical to adopting the single currency (Mintz,1970).

Even before the launching of EMU critical comments were made. They pointed out that there are risks arising from the absence of political integration (Krugman, 1992; Feldstein, 1992). Feldstein states that an artificially created economic and monetary union may actually restrict trade between Member States and would almost certainly increase the level of unemployment for some time. Feldstein did not understand those who advocate monetary union, but rejected any move towards a federalist political structure for Europe. This is the formula for the economic costs without any political gain (Feldstein, 1992).

According to Feldstein political considerations prevailed over economic ones and monetary union is not beneficial for the EU. It is clear that there is a political vacuum at the European level in terms of a European superstate. The absorption of shocks remains solely in the hands of nation states and it is an important risk element. It is debatable to what extent nation states are able to eliminate the effects of asymmetric shocks, which can result in conflict between national governments and the ECB. Full monetary union without political union could have serious fiscal consequences for the euro area (Krugman,1992).

De Grauwe distinguishes two levels of political integration: institutional and operational one (De Grauwe, 2006). From an institutional point of view the EU has created a large number of institutions to which member states have delegated some of their sovereignty. In functional terms, the transfer of sovereignity takes place unevenly. There are areas in which the significant transfer of sovereignty has been realized such as: agriculture, external trade policy, competitiveness. On the other hand, the minimum transfer of sovereignty is registered in the area of taxation, social security and wage policy. De Grauwe argues that the euro area without further political integration has little chance to survive. Firstly, the political union should have certain characteristics of budgetary union, i.e. member states should provide some competence in the area of expenditure and taxation to the European executive bodies. This would allow to create a system of insurance against asymmetric shocks in the euro area. On the other hand, it would require a substantial increase in the size of the European budget.

Conclusion

1. The theory of optimum currency area has become extremely influential theory as a basis for monetary integration process.

2. The OCA theory represents a starting point of evaluation whether European Union had been prepared for the single monetary policy. The renaissance of theory began just with the European integration process (EMS crisis in 1992-1993, a project of EMU expansion of eurozone).
3. The theory of optimum currency areas has been criticized as well. Firstly, the critics have asked whether the differences between countries are so important that they result in the costs in the monetary union. Secondly, it was pointed to the fact that the exchange rate instrument is not always effective in resolving the differences between countries.
4. Optimum currency area is effective only in areas where there is political integration as well. The success of monetary union is also based on a common political consensus and sharing common priorities.

References

1. AHREND, R. et al. (2008): Monetary Policy, Market Excesses and Financial Turmoil", OECD Economics Department Working Papers, No. 597.
2. ALLSOPP, Ch. - ARTIS,M.(2003): The Assessment: EMU, Four Years On. Oxford Review of Economic Policy, 19, No., Spring.
3. BALDWIN, R.-WYPLOSZ, CH. (2008): Ekonomie evropské integrace. Praha, Grada Publishing ISBN 978-80-247-1807-1.
4. BARRELL,R. et al.(2008) : The Impact of EMU on Growth and Employment. National Institute of Economic and Social Research, Economic Papers 318.
5. BAYOUMI, T. – EICHENGREEN, B. (1992): Shocking Aspects of European Monetary Unification. CEPR Discussion Paper No.643, May.
6. CURRIE, D.(1997): The pros and cons of EMU. The Paper, HM Treasury, London.
7. DĚDEK, O. (2002): Česká ekonomika a euro. Politická ekonomie, 50, 2002, č.3.
8. DE GRAUWE, P.(2006): Some thoughts on monetary and political union. Leuven: University of Leuven 2006, in: http://www.econ.kuleuven.be/ew/academic/intecon/Degrauwe/PDG-papers/Contributions%20to%20books/EMU%20and%20Political%20Union-V.pdf
9. DE GRAUWE, P. (2007): Economics of Monetary Union. Oxford University Press.
10. DE GRAUWE, P. (2010): Crisis in the eurozone and how to deal with it. In: CEPS Policy Brief, no. 204/February, available on: www.ceps.eu
11. DE SOUZA, L.V., VAN AARLE, B. (2004): Euroarea and the New EU Member States. Basingstoke: Palgrave Macmillan ISBN: 1403915199.
12. EICHENGREEN, B. (1990): One Money for Europe? Lessons from US currency union. In: Economic Policy, 10, 1990.
13. FELDTEIN, M.(1997): The Political Economy of the European Economic and Monetary Union Political Sources of an Economic Liability. In: Journal of Economic Perspectives, Vol.11, no.4.
14. FELDSTEIN, M. (1992): The Case against EMU. The Economist, June 13rd, 1992.
15. FLEMING, J.M.(1971): On Exchange Rate Unification. The Economic Journal, 81.
16. FRIEDMAN, M. (1966): The Case for Flexible Exchange Rates. In: Essays in Positive Economics. Chicago: The University of Chicago Press ISBN-13: 978-0226264035.
17. ISHIYAMA, Y. (1975): The Theory of Optimum Currency Areas: a Survey. IMF Staff Papers, vol. 22.
18. IŠA, J. - OKÁLI, I. (2008): Európska menová únia, optimálna menová oblasť a možné dôsledky vstupu Slovenska do eurozóny. In: Politická ekonomie, 2008, roč. LVI, no.3.
19. INGRAM, J.C. (1973): The Case for the European Monetary Integration. Essays in International Finance, no.98.
20. KENNEN, Peter B. (1969): The Theory of Optimum Currency Areas:An Eclectic View, In: R. Mundell, A. Swoboda: Monetary Problems of the International Economics. University of Chicago Press.

21. KRUGMAN,P. – OBSTFELD,M. (2008): The Theory of Optimum Currency Area. In: International Economics. Addison Wesley, ISBN-13: 978-1408208076.
22. KRUGMAN, P. (1992): Second Thoughts on EMÚ. In: Japan and the World Economy 4.
23. McKINNON, R. (2000): Mundell, the Euro, and Optimum Currency Areas. Working Paper, Standford University.
24. Mc KINNON, R. (1963): Optimum Currency Areas. American Economic Rewiev, 53.
25. MINTZ, N. (1970): Monetary Union and Economic Integration. New York: N.Y. University Graduate School of Business Administration.
26. MONGELLI, F.P. (2002): „New“ Views on the Optimum Currency Area Theory: What is EMU Telling US? Working Paper no. 138 ECB.
27. MUNDELL, R. (1961):A Theory of Optimum Currency Areas. American Economic Review, 51 No. 4.
28. MUNDELL, R.(1968): International Economics, New York: Mac Millan, s. 178
29. MUNDELL, R.(1997): Optimum Currency Areas. Paper at the conference on Optimum Currency Areas. Tel Aviv University, December, p. 11-13.
30. STIGLITZ, J. (2003): UK must avoid „abused“ euro. By Ian Fraser – Sunday Herald, October 12th.
31. TAVLAS, G.S. (1993): The „New“ Theory of Optimum Currency Areas. In: The World Economy, November 1993, vol.16, no.6.
32. WANNINSKI, J. (1999): Mundell on euro. Memo to: R. L. Bartley, editor The Wall Street Journal, October.

FLEXIBILITY IN LABOUR MARKET RELATIONS BETWEEN EMPLOYERS' AND EMPLOYEES'

Liga Rasnaca Ph D, Latvia University of Agriculture, Liela iela 2, Jelgava, Latvia, LV 3001, liga.rasnaca@llu.lv, 25999188

Abstract. The labour market is an arena where the employee exchanges his or her labour for wages, status or any other goods achievable by work. The concept covers those institutes and practises which lead the processes of exchange and the receiving of services between employees, employers and other agents who take part in the labour market processes as representatives of employees and employers or as national or local government institutions and nongovernmental organisations (NGO). Flexibility in labour market relations may differ in different spatial regional units. The main attention is paid to the flexibility of the relations between the agents of the labour market in different rural and urban areas. The flexibility of labour market relations can be characterised with the help of different dimensions of flexibility. A consolidated flexibility index with four dimensions has been developed to assess the flexibility of the employers of different territorial units. The dimensions are: flexibility of employees' recruitment, flexibility of the attitude to employees from different social groups, flexibility of employees' attachment and flexibility of employees' evaluation. However, at least theoretically the avoidance of flexibility as an adaptation to the changes in the labour market is also possible.
Key words: labour market; labour market agents, flexibility

Introduction

Labour market is an arena where the employee exchanges his or her labour for wages, status or any other goods achievable by work (Kalleberg, Sorensen, 1979, 352). Labour market functioning could be characterised by relations among key agents of labour market: employers and employees in labour market processes (recrutement, attachment, dismissal). The concept covers those institutes and practises which lead the processes of exchange and receiving of services between employees, employers and other agents who take part in the labour market processes as representatives of employees and employers or as national or local government institutions and nongovernmental organisations (NGO).

At the beginning of the 21st century, the new employers of private sector established themselves in Latvia and other post-socialist society's labour markets, and changes occurred amongst the employers of the public sector (state and local governments), the global economical and financial crisis deepened the already existing unsolved problems. That is why flexibility is so current an issue in labour market relations, because it lets the adaptation for changes in labour market relations to happen.

The article has drawn attention to those aspects of labour market relations which are related to the flexibility of the relations between employers' and employees' in different regional units.The main goal is to find out if the theoretical approach is appropriate for the analysis of labour market relations in different regional units in Latvia. The specific task is to construct instruments for measuring employers' flexibility in regional units based on analysed theoretical approaches.

Latvian labour market relations have to go through transformations due to its socialist and soviet experience and integration in global and European Union labour market processes. Remarkable regional differences are immanent features of Latvia's labour market during last twenty years after the reestablishment of independence (unemployment rate, economic activity, etc.). Regional differences could be understood from the perspective of rural and urban division. The author operates by concepts "urban regions" and "rural regions" popular among labour market researchers (Copus, et.al., 2006). When determining the "urban" and "rural" areas, the author of the article uses the recommendations of the Organisation for Economic Development and Cooperation as the basis (population density, distribution of population, the size of cities). In accordance with this classification only the Latvian capital Riga and its surroundings are predominantly urban regions but the rest of the country is predominantly rural (Latvia. Human Development Report 2006/2007, 2007, 44).

The article pays attention to analysis of theoretical ideas about the genesis of flexibility and regional differences in labour market relations by Spanish descendent sociologist of social changes Manuel Castells, Polish descendent English sociologist of culture Zygmunt Bauman and German sociologist, creator of risk society concept Ulrick Beck. In order to interpret the flexibility of labour market relations in the medium level theories, the author investigates post-Fordism, neo-Fordism (Michael Hendel) and neoinstitutionalism (Paul di Maggio) theories.

The theoretical perspectives of labour market relations flexibility are analysed in the context of post-industrial labour market transformations. In order to deepen the analysis of labour market relations author uses the concept of flexibility, attending those manifestations of flexibility in labour market relations which allow talking about the expressions of post-Fordism and neo-Fordism in relations between employers and employees.

Flexibility in the labour market in EU countries has been an issue of social and economic development for at least the last three decades. Flexibility means survival in the constantly changing environment which requires adjustment, its understanding differs depending on the position of the labour market agent in the labour market (Gouliquer, 2000). Flexibility is referred to both the length of work and the contract and entrance into the labour market, as well as leaving it (Van der Steene, 2008; Edgell, 2006). The concept of flexibility is used when characterising particular labour market agents and their mutual relationships. Flexibility is the concept that may denote particular material changes and/or employer and employee strategies in the labour market. Flexibility is associated with the ability to survive in the global economics. Both the employer and the employee can be flexible, versatile, fast-thinking, and ready to any changes. However, an

inflexible employer or employee is hide-bounded, bureaucratic, and resistant to change. The most frequently mentioned dimensions of flexibility in the characteristics of the employers are functional flexibility, numerical flexibility and temporal flexibility. Flexible employer and employee relationships can be characterised through the core and the peripheral part of the employer's employed staff as well as diversity in the formation these relations (Strangleman, et.al., 2008; Watson, 1996; Ghezzi, et.al., 2007; Akioyoshi, 2003).

The author of the article is interested in the flexibility of labour market relations when entering the market and maintaining the labour market relations.

Theoretical framework

In the industrial and post-industrial period labour market relations are researched by Ulrich Beck, Manuel Castells and Zygmunt Bauman who represent schools of sociological thought of the $20^{th}/21^{st}$ century. Admittance of the differences between the industrial and the post-industrial period is the unifying element in these schools of thought, but at the same time there is an indication to a certain succession in developing employer – employee relations and also in the status rights. The analysed authors admit the existence of two different periods in labour market relations, but they emphasise different aspects of these differences and use different terminology. The difference is expressed in the speed of changes in the labour market (the risk and the spread in space and time increases, as well as the volume). Bauman emphasises the liquid character of the latest labour market relations period, the advantages of those labour market agents who can move fast and easily in space and acquire new methods in the labour market, emphasising the importance of the employers' power. Bauman indicates to a certain inequality affecting those who are attached to a place, family or who lack resources for a smooth and fast transition to another space, industry (Bauman, 2001, 228). Beck emphasises the decrease of the importance of geographical attachment in the labour market, the increase of the importance of the global risk factors and the decrease of the class division and mobilisation opportunities along with the increase of polarisation. In the opinion of the author of the article, the concept used by Beck's "halfway modernity" very precisely characterises those societies that are trying to enter the post-industrial labour market from the socialistic employment model (Beck, 2005, 202). Castells' "space of flows" theory underlins the global influence (flows) of people, capital and knowledge on labour market relations (Castells, 2000). Having analysed Castells, Beck and Baumann's terminological approaches, the author has decided to use the most frequently approbated and used concepts "industrial", "post-industrial" and "halfway modernity" to denominate the periods (and specific features) of labour market relations.

Terry Marsden, professor at the University of Aberdeen, researcher of rural development divides three possible variations of development of European rural areas: agri-industrial, post-productivist and sustainable rural development models. Marsden's models of sustainable rural development are close with Castells' theory of space of flows, underlining the influence of people, capital and knowledge on labour market relations in rural areas. There is a lack of protection mechanisms in rural areas against dangerous influences of space of flows, to allow maintain a local labour market. The sustainable model of rural development includes the co-operation between urban and rural areas as a prerequisite for the long term functioning of rural labour market (Marsden, et.al. 2005). Both authors emphasize differences in urban and rural labour market. Labour market relations can only be created if new labour market processes are happening (e.g. establishing of new employers, need for employees of a different qualification, knowledge and skills, change of the number of employees etc.) which is why the author thinks that in rural and urban areas the access to the „space of flows" is essential to the existence of labour market relations and their flexibility.

Different tendencies are also observed in the medium level theories of the labour market relations in the labour market theories. Within the perspective of post-Fordism (Michael Handel) those changes in the labour market relations are emphasised that evaluate employees' autonomy and that are aimed at evaluating knowledge and skills and use of technology (Handel, 2007). Within the perspective of neo-Fordism (George Ritzer), the intensification, standardisation and monitoring of employees' execution functions, understating of skills and knowledge is continuing, which affects employer and employee relations also in the service industry (Ritzer, 2008). In order to analyse flexibility of labour market relations the author has drafted a conceptual model, using also the concept of labour relations and work insecurity in small post-socialistic towns by Alison Stenning (Stenning, 2005), society transformation researcher at the University of Newcastle, the concept of myth of flexibility myth by Hariett Bradley (Bradley, et.al., 2004) researcher of gender and work sociology at the University of Bristol, the concept of long-term and insufficient employment by Kevin Doogan (Doogan, 2005) researcher of employment politics at University of Bristol.

Bradley questions the scale of the changes taking place in the labour market and the increase of the mass autonomy (Bradley, et.al. 2004, 110-117). Doogan supplements Bradley's explanation that demands for flexibility (as demand for skills and knowledge) is common only in a relatively small part of labour market with an idea about labour market agents' reluctance to change long-term labour market relations to short term, temporary ones. The author considers that demand

for skills (e.g. information technologies) allows explaining flexibility segmentation in labour market, taking in account the effect of new technology (Internet and telecommunications).

Barriers to the flexibility of labour market relations can be characterised as external (lack of space of flow: unavailability of infrastructure, administrative structures) and internal (institutional structures, their type of operation, individual behaviour). Research of the representative of neo-institutionalism Paul DiMaggio approves that people try to fit the new experience in the previous framework and schemes (DiMaggio, Powell, 2003). Barriers to the flexibility of labour market relations can be interpreted as institutional (norms, values, social symbols) or neo-institutional, such as "path dependency" at the individual and particular employers' level (Ghezzi, et.al., 2007).

The developed conceptual model allows explaining and grinding (Figure 1):

1) the differences in labour market relationships in regional units,
2) the regional differences in labour market relations flexibility in use of knowledge and information technologies,
3) the regional differences in labour market relations which are standardized, formal, insecure and based on predictable expectations (neo-institutionalisms).

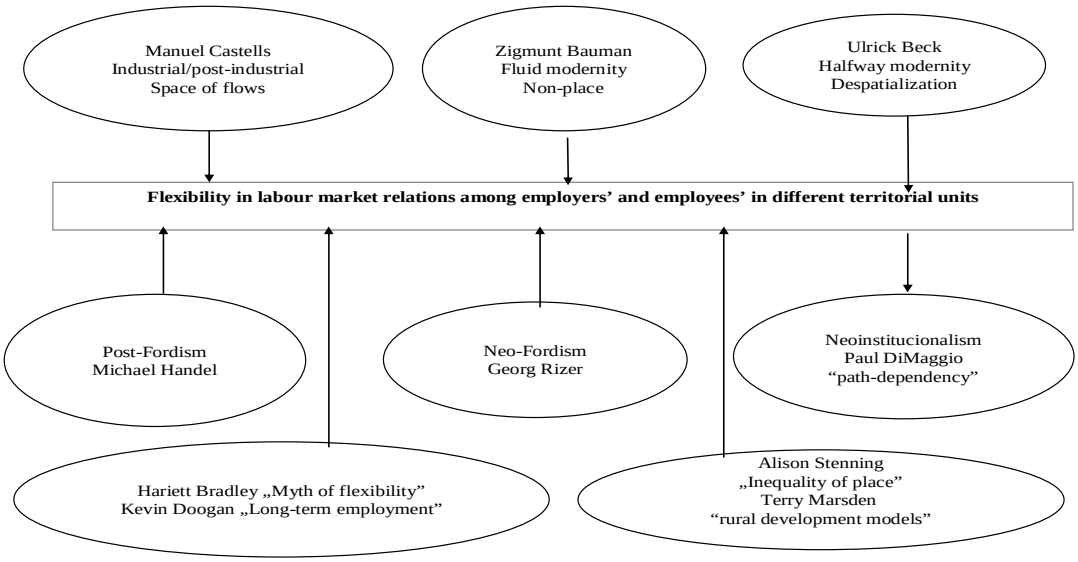


Fig.1. *Shematic description of theoretical prepositions used for building theoretical conception of labour market relations. Source: author's designed.*

Sociospatial perspective (space as integration of social and physical elements), similarly to Castells' "space of flows" conception, Beck's "social ***despatialization***" and Bauman's "non-place"

concepts allow integrating the characteristics of social and material elements in regional units, which creates a socio-spatial unity (Gottdiener, Hutchinson, 2005). Sociospatial perspective allows analysing the impact of global flows on local labour market processes as a complex, e.g. use of ICT (informational communication technologies), assessment of the knowledge of foreign languages, etc. Findings of the researchers of rural territories as a different sociospatial unit Terry Marsden allow the author to substantiate the application of the space of flows theory to the analysis of the labour market relations in rural territories where the threat of global risks is more expressed due to the remoteness of the territory and problems in availability of the infrastructure. Therefore the adjustment of labour market agents and the flexibility of relations are even more necessary in the rural areas to ensure the existence of the rural settlement places and the labour market relations.

According to the neo-Fordism theory the employer and employee relationships in the post-industrial period are characterised as 1) industrial relationships (Fordism) between the employer and the employees and post-industrial relations with an explicit increase of the service industry and emphasis on the importance of information and knowledge in the labour market existing simultaneously, 2) both the share of the labour market in which more complex knowledge and professionalism-based interaction between the employers and the employees is developing and that share in which this interaction is expressed in very simple standardised and repetitive relations is increasing simultaneously (Ritzer, 2008; Handel, 2007). As a result, the knowledge and skills of the employee are not used efficiently and the work time is spent on executing formal requirements, not allowing for employee autonomy.

Flexibility can consolidate the employers and the employees, their relationships, by supplementing their skills and knowledge and by levelling the organisational hierarchy. It can also be understood as a phenomenon that deteriorates the employee positions and does not solve the employer's problems, which means labour intensification and routinisation and formalisation of tasks.

Results and discussion

The progress of flexibility can be evaluated differently, depending on the observation of the interests of the labour market agents and the fact whether flexibility is directed toward the sustainability of the labour market relations. Researcher of the labour market segmentation Bradley defends the thesis that rejects the statement of post-Fordism about the general revolution of knowledge and skills in labour market relations. Breadly admits that the revolution of skills is attributed to the development of the service sector and the relative and the absolute increase in the

number of employers and employees in this sector in the post-industrial period, but she indicates to the changes in the structure of the service industry, where the fastest growing industries are fast food and telecommunication centres, which hardly can start and function in all labour market regional units (remote rural areas).

In both fast growing industries the employees have to perform a large number of simple, routine work operations that do not require high level of knowledge or skills (Bradley, 2004, 119-121). Bradley rather supports George Ritzer's neo-Fordism conception than Castells' and Handel's statements about the development of knowledge and information capable labour market relations in which educated and specific knowledge possessing employees are valued high.

Changes in the labour market relations not always mean demand for higher level of education, knowledge and skills, especially in the rural areas, where are limited possibilities to develop fast growing service sector industries (infrastructure, demand, etc.).

The author of the article uses also the neo-institutionalism paradigm. Depending on the past experience, "path dependency" allows explaining how individual or collective agents may adjust to the changing environment in labour market. The ability to adjust is related to the notion of relations flexibility or the lack of it in labour market (e.g. regional units).

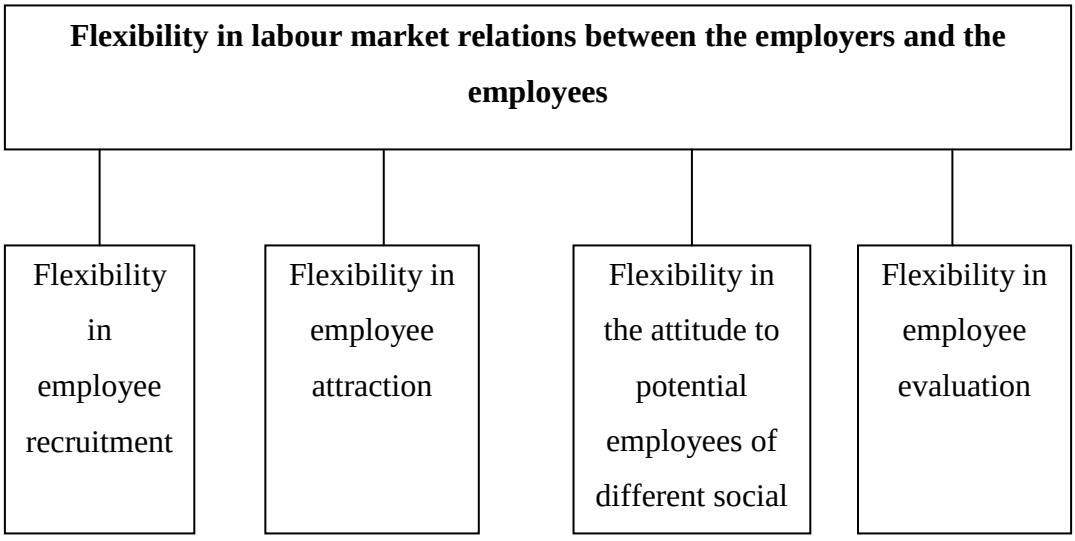


Fig.2. *Consolidated labour market relations flexibility index: author's designed.*

Using the described conceptual model, the author has developed a four dimension consolidated index of flexibility of labour market relations by which it is possible to measure the flexibility in labour market relationships.The flexibility of employer and employee relations and the correspondence of the employer requirements to the industrial or post-industrial period of the

labour market, features of neo-Fordism or post-Fordism labour market are characterised by the indicators revealed in the employers' choosing of:

1) types of employee recruitment,
2) types of employee attraction,
3) demands for a good employee,
4) readiness to employ representatives of different social groups (socially excluded risk groups).

A consolidated flexibility index with four dimensions has been developed to assess the flexibility of the employers of different regional units. The dimensions are: flexibility of employee recruitment, flexibility of the attitude to employees from different social groups, flexibility of employee attraction and flexibility of employee evaluation. Flexibility in labour market relations may differ in different spatial regional units. Each dimension of flexibility could be expressed differently in various labour market segments (e.g. regional spatial units).

However, at least theoretically the avoidance of flexibility as adaptation to the changes in the labour market is also possible. Lack of flexibility in labour market relations in particular spatial regional units can be expressed in at least two ways as labour market agents and mediators react to the changes (Rasnaca, 2010).

1. Traditional operation (according to the previously acquired successful model). It means hoping for traditional production development (sewing and food enterprises, work as tractor drivers in farming). Orientations to the previous profession, work conditions, position, labour relations.
2. Leaving the place. It can be done by any of the labour market agents: to emigrate, to transfer the enterprise, to stop offering a particular employment service. (Typical in places with a higher unemployment level, especially long-term unemployment, higher migration) (Boyd, 2002).

The consolidated flexibility index let to analyze risks and possibilities in labour market relations, evaluating risks for kye agents, particular social groups and processes in realization of labour market relations. The author considers that the perfomed analyses allow integrating macro and middle level theories for the analyses of labour market relations in different regional areas.

Conclusions

1. The author considers that the performed analysis of macro and middle-level theories allows validating the necessity for the development of an original conceptual model to analyse the

labour market relations in different regional units due to globalization as well as post-industrial, postsocialist transformations in society.

2. Labour market relations in the different regional units can be analysed, applying the author's developed conceptual model. The conceptual model includes synthesis of Castell's "space of flows", and Beck's "social ***despatialization***" and Bauman's "non-place" and "strangers' perception" ideas. That helps for better understanding of the labour market relationships in the urban and rural areas.
3. The functioning and existence of the labour market relations in some regional units (rural areas) is influenced by "space of flows" (migration, the lack of technologies).There are less opportunities to develop services as standardised, formally structured labour market relations (post-Fordism) in remote areas, because the range of potential service receivers is limited by the demographic situation.
4. The author considers that demands of flexible usage of the skills and knowledge in different regional units may differ significantly as explained Bredley's theory about "myth of flexibility".
5. Barriers to the flexibility of labour market relations could be analysed in the context of the concept "Path dependency" of neo-institutional theory.
6. Consolidated flexibility index give opportunity to evaluate labour market conditions in different regional territorial areas according external and internal flexibility criteria.
7. Consolidated flexibility index included four dimensions allowing to measure labour market relations' flexibility as a many-side phenomen.

References

1. Akiyoshi, M., (2003). *Flexibility of Communicating, University of Chicago.* Available: http://www.allacademic.com//meta/p_mla_apa_research_citation/1/0/6/5/7/pages106570/p106570-1.php (accessed 01, 06, 2011).
2. Bauman, Z., (2001). *Liquid Modernity*. Polity Press, Cambridge, p.228.
3. Beck, U., (2005). *The Brave New World of Work*. Polity Press, Cambridge, p.202.
4. Boyd, R., (2002). A „Migration of Despair": Unemployment, the Search for Work, and Migration to Farms during the Great Depression. *Social Science Quarterly*, Vol.83, Nr. 2, 2002, pp.554-567.
5. Bradley, H., Ericsson M., Stephenson C., Williams S., (2004). *Myths at Work*. Polity Press, Cambridge, p. 235.
6. Castells, M., (2000). *The Rise of the Network Society*. Blackwell Publishing, Oxford, p.594.
7. Copus, A., Hall, C., Barnes, A., (2006). Study on Employment in Rural Areas (SERA). Available: http://ec.europa.eu/agriculture/publi/reports/ruralemployment/sera_report.pdf (accessed 02, 05, 2011).
8. DiMaggio P., Powell W., (2003).The Iron Cage Revisited. In: Handel M. (ed.) *The Sociology of Organizations*, University of Wisconsin, Madison, SAGE Publications, pp.243-253.
9. Doogan, K. (2005). Long-term Employment and the Restructuring of the Labour Market in Europe, *Time& Society*, London, SAGE Thousand Ouks, pp. 65-87.
10. Edgell, S., (2006). (*The Sociology of Work.* London, Sage Publications, p. 244.

11. Gouliquer, L., (2000). Pandoras Box: The Paradox of Flexibility in Today's Workplace, *Current Sociology*, January, Vol.48 (1): Sage Publications, London, Thousand Oaks, pp.29-38.
12. Ghezzi, S., Mingione, E., (2007). Embeddedness, Path-dependency and Social Institutions. *Current Sociology*, Vol.55, No.1, January, International Sociological Association, SAGE (London), pp. 11-23.
13. Gottdiener, M., Hutchinson, R., (2006). *The New Urban Sociology*. Westview Press, Boulder. 2006, p. 408.
14. Handel, M. (2007).A New Survey of Workforce Skills, Technology, and Management Practices, Northeastern University, p.32.
15. Kalleberg A., Sorensen A., (1979). The Sociology of Labour Markets. *Annual Review of Sociology*, No. 5, pp. 351-379.
16. Latvia. Human Development Report 2006/2007.(2007) 120 p.
17. Marsden T., Smith E., (2005).Ecological Entrepreneurship: Sustainable Development in Local Communities through Quality Food Production and Local Branding. *Geoforum.*,36, pp. 440-451.
18. Rasnaca, L., (2010). Research of Latvian Employer and Employee Relations Regional Ddisparities in 21st Century (In Latvian: Rasnača L. Darba devēju un darba ņēmēju attiecību reģionālo atšķirību pētniecība Latvijā 21.gadsimtā Gr.: T.Tisenkopfs (sast. un zin.red.) *Socioloģija Latvijā.* Rīga: LU Akademiskais apgāds, lpp.239-254.
19. Ritzer, G., (2008). *The McDonaldization of Society*. Los Angles, Calif.: Pine Forge Press, p. 300.
20. Stenning, A., (2005). Re-placing Work: Economic Transformations and the Shape of a Community in Post-socialist Poland, In: *Work, Employment & Society*, 19; pp. 235-259.
21. Strangleman T., Warren T., (2008). *Work and Society.* Sociological Approaches, Themes and Methods. Routledge, New York, Abingdon, p. 344.
22. Van der Steene T., Sels L., Van Hootegem , De Witte, Forrier A., (2008). The Impact of the Institutional Context on the Politics of Flexibility: Comparison Belgium-the Netherlands. *Journal of European Industrial Training*, pp.384-393.
23. Watson, T., (1996). *Sociology, Work and Industry*. Routledge, London; New York, p.392.

MASS CULTURE VERSUS POPULAR CULTURE

**Dr. Marek Sokołowski, The Faculty of Social Sciences,
University of Warmia and Mazury in Olsztyn, Poland
e-mail dorota.kobus@uwm.edu.pl**

Abstract. Mass culture is one of the most discussed issues of contemporary times. The development of mass culture was possible due to the urbanization process, the industrial revolution and the development of mass communication. U. Eco is collected arguments against mass culture, as voiced by various critics: the standardization of content, the commercialization of art, the trivialization of the products of high culture, the promotion of passive attitudes towards content and the deadening of historical consciousness. On the other hand, according to supporters of mass culture, it popularizes culture among the masses, which previously did not have access to it. In addition, man always has the need for simple entertainment. The distinction between high culture and mass culture is invalid due to the problematic nature of classifying artwork into one of the two categories. It is impossible to determine what will advance into the category of high culture in the future. The term mass culture is often used as a synonym – both in everyday speech and in academic writing – for popular culture. In fact their meanings partially overlap, and are partially different. Popular culture was spread also via direct contact, and not only via technical means. We can actively participate in popular culture. Cultural changes are currently taking place, regardless of our attitude towards them. We can – using the terminology of U. Eco – adjust to it or await the final Apocalypse.
Key words: mass culture, high culture, popular culture.

Mass culture

As once stated by Krzysztof Teodor Toeplitz, the term *mass culture* is one of the most discussed issues of contemporary times. He explained that this is due to the fact that these two words encompass issues from various fields of life, including: the cinema and television, popular music and phenomena linked with fashion and customs. Toeplitz also associated the term with increasing population growth (Toeplitz, 1981, 5-6).

Wladyslaw Kopalinski writes that the term *mass culture* was formed in the 1940s in the USA. It is loaded with esthetic, entertainment and intellectual content specific for an urbanized society. This content is transmitted via mass media. In order to reach the maximum number of recipients the content includes little intellectual and aesthetic value. Often the subject matter is simplified and vulgarized (Kopaliński, Wiankowska-Ładyka, 1999, 217.).

K. T. Toeplitz also traces its origins to the times following the Second World War (Toeplitz, 1975, 132), and the development of mass society. The term *mass society* was defined by Herbert Blumer. According to Blumer mass society differs from other forms of collectivity due to a heterogonic social composition, the anonymity of its members, the existence of poor interactions between anonymous participants, and the lack of ability to act jointly (Goban-Klas, 2005, 211.)

Societies which fulfill all the above criteria were formed mainly in large industrial centers in the 19th century. The urbanization process was accompanied by various social phenomena. Among these, according to Dominic Strinati, were: an eradicated devotion to the land, the destruction of

close-knit rural societies, the secularization of society, the establishment of new life models in urban cities populated by anonymous crowds as well as poor moral integration (Strinati, 1998, 18.). Social interactions began to take on new meanings. Previously people had close emotional and social ties, knew each other well, had much in common. In this new epoch contacts become fleeting and shallow or even formal in nature – e.g. administrative. Despite urban crowding, people felt lonely in the presence of others (Kłoskowska, 1980, 119-120).

In the words of K. T. Toeplitz: "The formation of these new, qualitative and anonymous interpersonal relations is perhaps the greatest blow that history could have dealt man" (Toeplitz, 1981, 38).

The work routine also changed. Most people were condemned to a long and monotonous execution of the same activities in difficult conditions. A phenomenon called *work alienation* was observed. It pertained to separating the effects of work from the workers themselves (Olszewska-Dyoniziak, 1998, 147.). This led to passiveness and a lack of intellectual effort. Tired and burned out people became easy targets for salesmen of trivial and simple products.

There could be no mass culture without the development of a mass means of communication. Tomasz Goban-Klas called the 20th century, due to the development of the cinema, radio and television, the "period of media and communication" (Goban-Klas, 2005, 10). Currently a unique role is played by the internet.

The year 2001 changed the face of the internet. Until this time users mainly received online content. The beginning of the 21st century changed this. Blogs and social networking services were popularized, as well as online stores; users could now express their opinions concerning products, etc. This new reality was called the Web 2.0. Users could now become "creators" and active co-participants. Large social networks were formed (http://technologie.gazeta.pl/internet/1).

The scale of this new phenomenon can be illustrated by the fact that Facebook, a social networking service, had over 600 million users at the beginning of 2011 (http://www.socialbakers.com/blog/). Websites such as MySpace or YouTube allow users to publish their own creative content for an unlimited and culturally divergent potential group of viewers. Mass culture received yet another tool to popularize its content on a previously unheard of scale.

Based on the aforementioned aspects of the origins and development of mass culture we see that it was possible due to the urbanization process, the industrial revolution and the development of mass communication.

Criticism of mass culture

From the very beginning, mass culture has caused many controversies. Umberto Eco conducted an interesting classification of standpoints concerning this phenomenon. He called critics who saw only the negative consequences of mass culture the “apocalyptics”. The use of this term was due to the argument that mass culture was leading to the “demise of culture”. Supporters were called “integrators”. These people accepted the new phenomenon or were even fascinated by it. An illustration of the “Apocalypse” according to Eco can be found in his work on mass culture, while examples of integration stems from an analysis of the content generated by the culture (Eco, 2010, 27).

U. Eco collected the arguments against mass culture, as voiced by various critics. Among the most important are:

- Standardization of content. Means of mass communication target a diversified public and must adjust to “average tastes”. Original and innovative solutions are overlooked.

- Commercialization of art. Culture is governed by the rules of the market. Artistic content is overlooked due to the desire to obtain maximum profit. Only content expected by the public is produced. Additional needs are stimulated by commercials.

- Trivialization of the products of high culture (Kłoskowska, 1980, 320.). This content is distributed by the mass media in a “flattened” manner, so as not to force the viewer into making an effort. An equal sign is placed between the products of high culture and entertainment-related products. The concert of a pop music star can be assessed as an event of equal rank as an opera.

- The promotion of passive attitudes towards content. The products of mass culture should be constructed in a way that does not engage our attention. People are not encouraged to gain new experiences. Only maintaining the status quo is encouraged.

- The deadening of historical consciousness. The mass media offer a huge amount of daily information concerning contemporary events, due to which we are aware only of the present. Historical consciousness is beginning to fade (Eco, 2010, 70-73.).

The above list should be supplemented by N. Postman’s argument that all areas of life have been converted into an “appetizer” of show business, the aim of which is only pleasure. He coined the metaphor: amusing oneself to death (Postman, 2006, 114).

The author directed this severe criticism mainly towards television. Postman stated that the basic function of this broadcast media is entertainment (Postman, 2006, 121.).

The above arguments generated a response on the part of defenders of mass culture. Arguments for can be presented in a simplified manner:

- Mass culture did not take the place of high culture. It popularized culture among the masses, which had previously not had access to it. It is difficult to expect people with relatively little education to view art in the same way as someone well or highly educated. Yet even simplified forms of high art (i.e. painting reproductions) provide esthetic models for people who do not normally have contact with the products of high culture.

- Man has always had the need for simple entertainment. It is unfair to blame mass culture for the fall of high culture. People have not always spent their leisure time in a productive ways. As an example, boxing matches on TV can be compared to ancient gladiator fights.

- The standardization of content and the unification of tastes eradicates social differences. Thanks to simplification the content is more easily understood. This prevents "cultural exile" in backward social layers (Eco, 2010, 76-83.)

The term *mass culture* was probably used for the first time by D. MacDonald in his article *A Theory of Popular Culture*, in 1944. MacDonald is one of the greatest critics of the mass culture (Kłoskowska, 1980, 263.) MacDonald was very conservative and believed that art should be left to the elite; the remainder of society, according to the author, should maintain their old habits (Strinati, 1998, 23-24). We see here two conflicting perceptions of culture. They contain the center of the conflict between mass culture and high culture.

The distinction between high culture and mass culture is clearly evaluative and seems to be currently out of date and oversimplified. High culture is prescribed by such traits as elitism and activeness of recipients. Its creations are the result of creative and original work of artists. Here we can speak of work with permanent value. It affects the mind of its viewers and is linked with the sphere of the sacrum. Its educational aspect is also significant.

Based on contrasts we can formulate the features of mass culture. Its creations are fleeting and only of entertainment value. These products are designed with the maximum group of passive recipients in mind. Mass culture is said to be schematic. It affects the emotional sphere (Jakubowski, 2006, 23-25).

The distinction between high culture and mass culture is also invalid due to the problematic nature of classifying artwork into one of the two categories. It is difficult to ascertain criteria. Operating based on fixed standards might not lead to desirable results, as certain forms of art, thought to be "low", are actually included in the high culture category. An example is jazz music, once thought to be entertainment for the lower social layers. Currently it is considered elite music

with great artistic content. It is impossible to determine what will advance into the category of high art in the future.

In many ways mass culture is the people's antithesis. Previously local artists or craftsmen worked for people they knew personally, and were somehow connected with. The main objective of creativity was the desire to express one's own emotions. Folk art was strictly linked with the place it was created. Social determinants played an important role. All this caused art to be more diversified and individual in nature than are the products of mass culture. The global nature of mass products caused their content to become unified and adjusted to the suit the needs of diverse societies, often with nothing in common. Industrial products, manufactured for profit, replaced sincere emotions (Kłoskowska, 1980, 360-361.).

A comparison of these cultures is not completely correct. It is rather a mental abbreviation. For the most part it is due to the idealization of traditional culture. Folk elements are often incorporated into mass productions. They can be very successful (e.g. the work of Kapela ze Wsi Warszawa (Band from the Village Warsaw), which received many awards), or be the source of inspiration (e.g. songs by the band De Press, or the popular band Brathanki) for contemporary artists.

An introduction to popular culture

The term *mass culture* is often used as a synonym – both in everyday speech and in academic writing – for *popular culture*. Both terms have a lot in common. We must, however, be aware of the fact that these terms are not interchangeable.

An outline of the relationship between mass culture and popular culture poses many definition-related difficulties. Marian Golka says: "these terms (…) have a lot in common, but there are also many differences. Their meanings partially overlap, and are partially different. Their common denominator is a large number of recipients" (Golka, 2008, 146.). Golka then describes the differences, pertaining mainly to the different means of the diffusion of these phenomena; popular culture was spread also via direct contact, and not only via technical means. Additionally pop culture features feedback – a participant of a festival can become its broadcaster. Mass culture is linked with unified content which was designed to reach as many recipients as possible. Popular culture is currently diversified, and often pertains to niche content without chances of reaching a broad audience.

Marek Krajweski perceives mass culture as a phase of the development of popular culture. He additionally maintains that this phase was completed along with the "contemporary phenomenon of de-massing (Krajewski, 2005, 18) .Currently content is also targeted at smaller groups.

Dominic Strinati has a different approach to these terms. The author stated that "mass culture is popular culture created by mass industry techniques and sold for the profit of the mass public" (Strinati, 1998, 22.). Here the elements of both cultures are identical. The only difference is means of transmission. An example is concerts which do not require personal attendance. Yet the release of such performances on DVDs causes them to become a part of mass culture.

John Fiske described popular culture as the process of generating meaning inside a given social system. He wrote about an active process, dependent, for the most part, on its recipients. Fiske believed that for a product to become a part of popular culture it must be appealing and satisfy interests. Despite commercialization he wrote: "However industrialized culture may be, it will never be fitting to describe it in terms of the sales and purchases of products" (Fiske, 2010, 23).

There are also opinions that the term *popular culture* denotes "mass culture with a plus sign". Here we see a pejorative approach to the second term. It has been noticed that pop culture enables individuals to choose the contents they deem as interesting, and do not have to uncritically accept imposed products, oriented on profit (Olszewska-Dyoniziak, 1998, 155). We can actively participate in popular culture. We are not limited to passive reception.

D. Scheck places the products of pop culture between: "works of art in a gallery (…) and a street stand with corn". In his definition he strives to emphasize both the broad nature of the term, and its diversity. Scheck believes that pop culture, despite its naiveté, is not primitive. He also believes that high culture derives inspiration from the standards imposed by pop culture (Scheck, 1997, 5-6.).

According to M. Krajewski, the problem with defining mass culture is due to the fact that the phenomenon is both very broad and universal. It cannot be effectively put into words. Furthermore, the phenomenon is relatively new. It is thus difficult to "take a step back" and objectively describe it. A further problem is the phenomenon's dynamics. Pop culture has been termed by Krajewski as: "undoubtedly the most dynamic type of culture". It is thus difficult to indicate its limitations. A researcher will never get its whole picture; we can merely draw its outline. It is also difficult to state whether popular culture can be separated from other cultures and whether it is possible to indicate features which characterize solely popular culture. The last issue discussed by the theory of mass culture is that the phenomenon is mainly evaluated – no attempts are made to understand it (Krajewski, 2005, 15-16.).

The weakness of disciplines which analyze popular culture is portrayed by the words of M. Krajewski: “pop culture cannot be described or explained unequivocally to its recipients, or even analyzed”. Krajewski believes that this is due in part to the commercial nature of pop culture. Despite the pejorative attitude towards the pursuit of profit and procurement of material goods, these phenomena prompt processes which alter our lives. It can be said that money is a desultory, random power, which materializes itself in the way individuals spend their free time, in trends and entertainment (Krajewski, 2006, 5).

It is believed that popular culture preceded mass culture. It is linked with the birth of capitalism and mechanisms of the formation of nationalism. Thus some researchers place its origins in the beginning of the 18th century in Europe. Others connect mass culture with its entertainment function and see its origins in popular forms of entertainment in the Roman Empire (e.g. gladiator fights). In this case we can say that pop culture has been with us since the origins of mankind (Strinati, 1998, 15).

Popular culture is sometimes criticized as the tool of Americanization. Americanization can be defined as imposing American behavioral patterns on other cultures. This is due to the fact that a large amount of pop culture originates in the USA, mainly in the fields of cinematography and popular music. Yet pop culture takes on many forms, depending on many conditions, and American culture is just one of its many aspects (Nieroba, 2010, 50)

Cultural changes are currently taking place, regardless of our attitude towards them. We can – using the terminology of U. Eco – adjust to them or await the final Apocalypse. Whether we like it or not pop culture and mass culture are all around us. The shape of the future of culture remains a great unknown. We should, however, pay close attention to its transformation.

References

1. Castells M., *Społeczeństwo sieci*, Warszawa 2007.
2. Eco U., *Apokaliptycy i dostosowani. Komunikacja masowa, a teorie kultury masowej.*Waszawa 2010.
3. Fiske J., *Zrozumieć kulturę popularną*, Kraków 2010.
4. Goban-Klas T., *Media i komunikowanie masowe. Teorie i analizy prasy, radia, telewizji i Internetu*, Warszawa 2005.
5. Golka M., *Socjologia kultury*. Warszawa 2008.
6. Jakubowski W., *Edukacja w świecie kultury popularnej*, Kraków 2006.
7. Kłoskowska A., *Kultura masowa*. *Krytyka i obrona.* Warszawa 1980.
8. Kopaliński W., Wiankowska-Ładyka Z. [red.] *Słownik wydarzeń, pojęć i legend XX wieku*. Warszawa. 1999.
9. Krajewski M., *Kultury popularnej.* Poznan 2005.
10. Krajewski M., *POPamiętane*, Gdańsk 2006.
11. Nieroba E., *Flirty tradycji z popkulturą: dziedzictwo kulturowe późnej nowoczesności*, Warszawa 2010.
12. Olszewska -Dyoniziak B., *Oblicza kultury. Wstęp do antropologii międzykulturowej komunikacji*, Kraków 1998.
13. Postman N., Zabawić się na śmierć. Dyskurs publiczny w epoce show-businesu. Warszawa 2006.

14. Scheck D., *Leksykon amerykańskiej popkultury*, Kraków 1997.
15. Strinati D., *Wprowadzenie do kultury popularnej*, Poznań 1998.
16. Toeplitz K. T., *Kultura w stylu blue jeans*, Warszawa 1975.
17. Toeplitz K. T., *Wszystko dla wszystkich*, Warszawa 1981.
18. http://walthowe.com/navnet/history.html [02.05.11].
19. http://technologie.gazeta.pl/internet/1, 104665,7963172,Web_3_0_jest_blizej_niz_myslisz.html [02.05.11].
20. http://socialbakers.com/blog/ 100-facebook-reaches-another-milestone-600-million-users/ [02.05.11].

„HUMANITIES GREY HAIRS" – ASPECTS OF THE AGEING OF SOCIETY

Dr. Beata Tomaszewska-Hołub
Dr. Wacław Domaszewicz
The Faculty of Social Sciences,
University of Warmia and Mazury in Olsztyn, Poland
E-mail dorota.kobus@uwm.edu.pl

Abstract. Modern demographic transformations that take place in European societies cause the process of ageing to become irreversible and persistent. This is happening as a result of the simultaneous occurrence of such factors as average life expectancy growth, fertility decrease and a negative birth rate. As a result the structure of European population changes, the amount of people in pre-productive age decreases and simultaneously the amount of those in post-productive age grows. The process of the ageing of many societies, as well as Polish society, creates many economical, political, social and cultural consequences. An increasing number of seniors cause them to become an important, although specific type of consumer. A growth of demand for health services, education and artistic services should be expected. But the most alarming is the problem of rapidly growing fiscal deficiency and the insufficient financing of the Polish retirement system. In order to prevent retirement system bankruptcy it is necessary to constantly monitor such areas as: reform of retirement system, introducing later retirement, increasing the effectiveness of work and the professional activation of seniors as well as the liberalization of immigration regulations.
Key words: ageing, seniors, discrimination, retirement, employment.

The characteristics of the ageing process in society

The ageing of societies has become a demographic, social, economical and cultural fact. The first symptom to be observed is the systematic growth of the percentage of elderly people in the whole population. It is the result of an increasing average life expectancy, which on global scale grew from 47 years in 1955 to 65 years in 1995 and according to the UN, will reach 73 years in 2025. Another factor which stimulates this process is the prosperity of countries, which results in better social security and easier access to health care, which leads not only to an increased percentage of elderly people in the society but also to an extended life expectancy (Synak 2002, 12). The highest percentage of elderly people occurs in such countries of Western Europe as Sweden, Germany, Great Britain and France (Kowaleski 2006, 30). In these countries the number and percentage in the population of the so called "old-old"[30], which means people above age of 80, is also growing and currently constitutes 25% of the senior population. To sum up, the ageing of society can be analyzed in two dimensions – extensification, which means the probability of living till the age assumed as a borderline for old age, and intensification, understood as extending life expectancy of those who have already crossed this borderline.

Another issue is the time range of the process of ageing in society. Spreading this process in time has its crucial social and economical advantages. In many countries in Western Europe the

[30] It is a notion introduced to demography for describing those, who are incapable or capable to some limited degree to independend function in society.

process of ageing has been taking place for at least 25 years and paradoxically the long lasting nature of this process allowed for a relatively advantageous adaptation to the situation. In countries where the ageing process is now accelerating (like e.g. Poland), it will become more intense in the near future, when large numbers of people crosses become older than 65. This situation may cause the intensification of social problems at a much larger scale.

The social causes of the ageing of society

One fundamental factor that influences the process of ageing is a constant decrease in child birth, creating a smaller percentage of children in society and at the same time increasing the percentage of adult and elderly people. Additionally the long-lasting tendency of decreasing child birth rates leads to a decrease in amount of children, teenagers and also adults, whereas the amount of elderly people relatively increases, which results in the growth of the index of societal ageing.

It is worth while to emphasize that the registered changes in population growth have a social explanation – they are the result of the transformation of the current model of family life. Accepting – especially by young people – the so-called Western model of living results in a decreasing birth rate. The causes of this situation are amongst others the increasing interest in education, difficulties in the job market, smaller allowances for families, dysfunctional families and difficult social and economical conditions which people in a procreative age find themselves. These negative tendencies are additionally strengthened by transformations in the field of performing social roles, an increase in the number of informal relationships and the number of divorces.

Intense economical stabilization pressures, aiming at the constant raising of the social status of an individual, generating ones own success and treating the factors above as a main factor of self-assessment has become a social fact that influences mainly the young generation. Family and children, as chosen values, loose their meaning to some degree. Even more common are decisions to put off having children and reduce the number of children. What is more, the process is not finished and applies to following generations.

All the reasons above not only atomize society, weaken family relations but in consequence contribute to disadvantageous demographic changes. The ageing of societies intensifies, leading to constant changes in the structure of the population. As a result it is the population of people in their productive years that is more burdened with the generation of their parents and grandparents than the generation of children – and that leads to an obligating dependence of a persistent character, deepening with time.

Characteristics of the process of ageing in Poland

During the last 25 years ageing has also become a part of Polish society, although as a result of changing child birth rates the process has differed in its dynamics. Among basic parameters that create the demographic picture of Poland the decrease in the child birth rate should be counted, which causes a systematic decrease in the percentage of children in the population and intensifying, especially at the time of transformation, the emigration index. This situation overrates the condition of the whole Polish society, moreover it creates new challenges both in social and economical fields. The borderline of demographic „old age", set by the UN as 7% of the people at the age of 65 in population was crossed by Poland in 1967, while in the same time in Sweden it was 13% of people over the age of 65, almost 13% in France and Belgium, 13,5% in Austria and over 15% in the former German Democratic Republic.

The Polish pyramid of the population of the XX century indicates at a phenomenon of fluctuation of the following generations, numerous or obviously less numerous. The mechanism of the fluctuation of demographic occurrences is embedded in the process of the reproduction of population. The less numerous years fell in the time of I World War, after which in the period between wars an increase in the birth rate occurred. But soon after World War II began, so that the generation born during I World War, being at their period of best fertility, had unfavorable conditions to realize it. The post-war period was the period of the baby boom; the first one took place in the 50's. At that point the reproductive plans of women were being realized both who had just entered the age of highest fertility and those older, who postponed those plans as a result of the war. So between 1950–1960 Polish society was young, of a relatively big and growing number of births, which mainly resulted in the constant growth of population (Holzer 2003, 16-17). Additionally, the large number of births after the war inhibited the growth of percentage of the elderly people in Polish society. In the following years the same effect was observed thanks to the baby boom population coming of age. Between 1955 and 1975 the child birth rate was gradually decreasing. In Poland the percentage of people over the age of 65 in the population increased every year since 1967. In 1968 the share of people over the age of 60 was over 12%, which according to Rosset scale[31] means reaching the state of demographic old age in Poland. According to Sauvy's[32]

[31] According to Rosset a scale of 4 degrees should be assumed I demography, which enables counting an index of ageing for society. The so called demographic youth is characteristic for a population, in which people over the age of 60 constitute less than 8% of population. The so called foreground of ageing means when the percentage of people over the age of 60% is between 8-10%, when its between 10-12% we call it the proper ageing of population. The last, fourth level means so called demographic old age, when the percentage of people over the age of 60 is over 12% of all population.

old age index, Poland is counted among ageing countries and in the future the ageing process will intensify as a result of the gradual growth in the number of elderly people and a decreasing number of the young and children. In the specialist literature another measure of the ageing process' dynamics is the so called Bourdelais' variable verge of old age. According to it, the border of old age is the age, at which the statistical individual is left with the last 10 years of life. In such cases those years are the period of real old age. The percentage of elderly people counted by this index is much lower than when you apply the constant value of 60 or 65 years. Adopting UN standards, Polish society crossed the border value of the so called advanced demographic old age in 1980 – set as 10% of people over the age of 65 in the whole population.

Although the process of ageing seems to be constant, our country is not counted among old societies, because the pace of the ageing of the population has been relatively slow. However, according to demographic prognosis prepared by the Central Statistical Office for 2003-2030, the population of Poland in forthcoming years will gradually decrease (table 1)

Table 1. The population of Poland according to the prognosis of the UN (in thousands)

Year	2015	2020	2025	2030
Population	38 173	37 840	37 337	36 680

Central Statistical Office, 2005, p.16

Additionally, as a result of fluctuations in the following generations, in the structure of the population the percentage of children and young people decrease, as well as the amount of people at the productive age, while simultaneous the growth of the percentage of people in the post-productive age will increase (tab.2).

Table 2. Changes in the structure of Polish population according to age (%)

Age group	2015	2020	2025	2030
0-17	16,7	16,3	15,8	14,9
18-59/64	63,5	60,8	58,9	58,2
65+	19,8	22,9	25,3	26,9
All	100%	100%	100%	100%

[32] In his demographic works Sauvy proposed so called ageing index in society, which would be expressed by relation between the number of old and young people.

CSO, 2005, p.16

Moreover, among the people in their productive age the process of internal ageing will occur. This situation will cause very difficult conditions in the labour market, where soon a transformation of labour resources we now own will be necessary, as well as the strengthening the fraction of the generation 50+, or even the professional stimulation and training of older people, who now stay away from the labour market.

One of intentional actions stimulating the professional activity of older people is the program "50 plus", introduced in Poland in 2004. Its aim is to increase the work effectiveness of this age group, by teaching them modern technologies, improving professional skills and widening their knowledge. An increased percentage of older people in the number of people employed means lowering cost of earlier pensions, which could relieve public finances and improve the permeability of the labour market (Klimkiewicz 2009, 4). The index of employment of people over the age of 50 is low enough to stimulate this group of employees by creating the regulation of promoting employment and labour market institutions, where a specific category of unemployed was separated - those over the age of 50. In reference to the 50+ generation it was observed, that the number of acts of discrimination in the labour market increased. The problem is serious enough to be commented on by the European Comission in the 13th paragraph of the Amsterdam Treaty, 1997, in the provision about fighting discrimination in the labour market, including age discrimination also. Moreover, in the Lisbon Strategy, adopted by the EU in 2000, there is a provision about increasing the economical productivity of EU nations by, among others, the professional stimulation of people of late adult age (55-64) do the level of 60% (www.eurofound.europa.eu/publications/index).

Modern attitude of societies to the old – the role of old men

In the current profile of culture the standards and values that dominate depreciate old age. The representatives of the young generation are in a privileged position, because the rules that dominate glorify youth. The hegemony of youth, fitness and beauty defines ageing as something unpleasant and embarrassing – simultaneously pushing away the position of old people. Old is not a socially desirable value or economically effective in a consumer sense. This creates a situation of danger to elderly people.

An additional difficulty is that in old age people are gradually excluding themselves from playing crucial social roles. This state was called by E.Burgess a roleless role[33]. This undefined role places the old man in a disadvantageous social situation, which may result in social alienation or even a crisis of identity. It has an enormous meaning in the context of modern, postindustrial societies, in which every individual's activity, generating no service or product is valued relatively low. Currently the value of a man is evaluated in the category of producing something socially useful. The end of a professional career is a time of increased access to free time resources, but as the time spent not working is not a source of a functional role, it is also a time of increased unproductivity. The old individual ".. experiences a dilemma between freedom and uselessness and society has not worked out any idea of a reasonable role for a person at the age when he is poorly valued and considered unproductive" (Niezabitowski 2007, 81).

In Polish society, compared to other European countries, the role of old men is to some significant and relatively positive extent connected with the family. During the last 25 years the structure of the family has changed, although despite clear atomization, relations between generations – according to researchers – have not worsen that much. Undoubtedly this is the consequence of stronger family bonds in Poland and to some extent insufficient organization of alternative forms of elderly care, especially when their disability intensifies. The family is still a place of basic meaning in the field of satisfying the senior citizens most important needs.

The meaning of work in a senior's life

It is known, that the life's perspective of an individual changes depending on the stage of his life. In old age the value of staying in good condition and independence in life and action increases, as well as those connected with social integration. The basic problem is real access to the labour market whose form and scale responds to the seniors' expectations and capability, enabling them to be active and socially independent.

In a situation when the average life expectancy increases and the period of old age is lived through more and more advantageously, as different deficiencies, typical for the age are felt later and later it can be assumed, that seniors are in relatively better health. As a result they may want – or be forced to – stay professionally active for a longer time, which would allow them to gain additional income, keeping in touch with other people and cultivate social relations, satisfy their

[33] According to Burgess looping functional role and social identity by an individual happens as a result of retiring and stopping social activity. An individual then experiences being „trapped in socially vapid role."

needs related to work and – what is very important – would build the budget of the country. This has a fundamental meaning, especially as we are now observing the decreasing efficiency of the institutions of social security. At the same time it is worth remembering, that nowadays the situation in the labour market, especially the current unemployment problem may cause – and it really does – some discrimination of older people, who are eager to work. Employing an older person, who receives a retirement pension, is perceived morally wrong, as blocking work places to people in the productive age. Moreover, the existing regulations caused that until recently, as a result of extending access to retirement systems the professional activity of older people decreased (Szukalski 1999, 69-78). Relatively long education leads to a deformation of the relation between the time worked and the time of gaining experience, so currently in many economically developed countries the raising the retirement age for both men and women to the age of 65 is in progress.

Nowadays, as a result of decreasing labour resources, the chance of professional reactivation can create economically productive people, in different forms of employment from part-time to tele-work or professional advising. The better the education of the individual is, the higher the alternative cost of retirement. So the perspective of employing pensioners will be determined by their eagerness to continue work and the economical need of increasing employment. Another factor that may stimulate professional activity of people in a post-productive age is the fact, that the development of the market economy, especially high technology decreases the demand for simple physical work, but creates advantageous conditions for high-qualified people – regardless of age. Paradoxically the time of the transformation and restructuring of the economy may favour seniors' professional activation, especially in all those fields of economy, which do not require work which is limited by age (Frąckiewicz, 2004, 149). In the case of a stable or relatively stable economy, depending on changing work supply and low demand for work, the group of people in the post-productive age could be professionally activated (Pietruszek 2006, 197). It is worth remembering that in the last few years in Poland also there were attempts to legislate actions, which aimed at makings the retirement age of women at 65, the same as the retirement age for men and restraining the possibility of professional work after early retirement (Goliowska 2004, 208).

Conclusions

1. The process of the ageing of many societies, as well as Polish society, creates many economical, political, social and cultural consequences. The real perspective of work force deficiency mobilizes changes in the field of politics and work organization.

2. At the same time an increasing number of seniors cause them to become an important, although specific type of consumer (so the consumption demand has to also undergo transformation). A growth of demand for health services, especially in the area of medical care, rehabilitation, physical therapy and relaxation, education and artistic services should be expected. An important issue is to teach the senior consumers how to find offers suitable for them and that satisfying their needs, among the loads of offers potentially dedicated to them. This is an issue of great importance, because as a specific consumer type, the senior consumer will significantly influence the demand for goods and services of a specific economic type.
3. But what is most alarming is the problem of rapidly growing fiscal deficiency and the insufficient financing of the Polish retirement system, which will intensify even more when the baby boom generation retires. The stability of pensions from public retirement funds is impossible to maintain at current level. In order to prevent retirement system bankruptcy it is necessary to constantly monitor such areas as: reform of retirement system, introducing later retirement, increasing the effectiveness of work and the professional activation of seniors as well as the liberalization of immigration regulations.

References

1. Frąckiewicz L., 2004, Polska starość demograficzna w europejskim tle, w: Samodzielność ludzi starych z perspektywy medycyny i polityki społecznej. Dotychczasowe doświadczenia UE i Polski. Materiały konferencyjne, Polskie Towarzystwo Gerontologiczne, Warszawa.
2. Golinowska S., red., (2004), W trosce o pracę. Raport o Rozwoju Społecznym Polska 2004, Program Narodów Zjednoczonych ds. Rozwoju, Warszawa.
3. Holzer J.Z., (2003) Demografia, Polskie Wydawnictwo Ekonomiczne, Warszawa.
4. Klimkiewicz A., (2009), Społeczno-prawne uwarunkowania aktywności zawodowej osób w wieku 50+ na rynku pracy, w: Polityka Społeczna, nr 2, Warszawa.
5. Kowaleski J. T., red. (2006), Ludzie starzy w polskim społeczeństwie w pierwszych dekadach XXI w. Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
6. Niezabitowski M., (2007), Ludzie starsi w perspektywie socjologicznej, Biblioteka Pracownika Socjalnego, Katowice.
7. Pietruszek M., (2006), Rynek pracy przyszłości wobec starzenia się ludności Polski, w: Ludzie starzy w polskim społeczeństwie w pierwszych dekadach XXI w., Kowaleski J. T., red. Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
8. Synak B., red. (2002) Polska starość, Wydawnictwo Uniwersytetu Gdańskiego, Gdańsk.
9. Szukalski P., (1999), Zmiany wieku przechodzenia na emeryturę, w: Gospodarka Narodowa, nr 10, Warszawa.

MIND MAPS AND THEIR USAGE TO DEVELOP STUDENTS' FOREIGN LANGUAGE SKILLS AND COMPETENCE

Inese Ate, Mag.paed.
Turiba University
Graudu 68, Riga, LV-1058, Latvia; e-mail:inesea@turiba.lv phone: +371 26137754

Kristīne Liepiņa, Mag.paed.
Turiba University
Graudu 68, Riga, LV-1058, Latvia; e-mail:kristines@turiba.lv phone: +371 26522744

Abstract. The topicality of this article is connected with the necessity to acquire foreign languages more effectively. Nowadays people face rapid changes and new challenges connected with globalization processes, extension of the labour market and a multicultural environment. These changes and challenges create new tasks for lecturers- to be aware of new approaches how to improve the teaching of foreign languages at the tertiary level, analyze one's own experience and compare that with the experience of other countries, and help students to acquire new "learning strategies".

Analysis of the theoretical literature shows that young people have well-developed cognitive abilities such as perception, thinking, memory and thinking operations – analysis, synthesis, comparison, generalization and classifying. Creating mind maps reflects the process of perception. The creating of mind maps does not promote a passive learning and learning environment, on the contrary it activates the learning environment and the study process. Concepts help to classify and arrange ideas/thoughts, and mind maps connect the right and left cerebral hemisphere.

The ability to memorize information can be significantly improved because process of creating mind maps resembles the memory process. Concepts, images and key words are used, and connections are formed between concepts.

Creating mind maps develops thinking and students learn to arrange concepts and ideas into systems. When we are thinking we use words and concepts, which are arranged into schemes or models.

The authors offer several ways how the implementation of mind maps in foreign language teaching and learning creates links between the previous and new knowledge, stimulates students to take active part in the study process and develops students' foreign language skills and competence.

Key words: learning styles, thinking process, visualization, concepts, mind maps

Introduction

Nowadays people face rapid changes and new challenges connected with globalization processes, extension of labour market and multicultural environment. These changes affect higher education and that is why the study process should be oriented towards development of different skills enabling students to react adequately to those changes, take appropriate decisions concerning these new challenges. One of the most important skills is foreign language skills for communication and professional use in a particular professional area. Moreover these changes and challenges forward new tasks for lecturers - to be aware of new approaches how to improve teaching of foreign languages at higher schools, analyze one's own experience and compare with the experience of other countries, and help students to acquire new learning strategies. As Grenfell and Erler indicate: "Central is the idea of equipping learners with what is necessary to make the most of

their own learning skills. This is where language learner strategies come in: they offer the tools for learners to manage their own learning." (Grenfell, Erler, 2007:4)

The aim of this work is to characterize the development of early maturity age group, analyze the components of the cognition process- perception, memory and thinking, show the possibilities to accelerate memorization by helping students to acquire skills for arranging concepts and thoughts in systems, creating of cognitive maps.

Theoretical framework

Different approaches to acquisition of foreign languages can be found in theoretical sources. The authors use one of the approaches based on the application of cognitive maps. Researchers Collins, Buzan, Fisher have written about cognitive or knowledge maps and application of those maps. To make sure that it is possible to apply cognitive maps for successful improvement of foreign languages skills at tertiary level, lets characterize in detail early maturity age group that coincides with average age of students at higher school.

The age between 20 and 24 is early maturity that is characteristics given by Erickson, Svence as well considers that at this stage ego crisis is directed to development of intimacy or isolation. Attempts to get high qualifications, acquire skills and knowledge, be involved in public activities, look for essence of life and entertain are typical of a person at that age. Thinking becomes more intellectual, abstract, independent and young people can generalize when seeking common principles and regularity in separate details.

According to Svence a person in adolescence has acquired abilities to perform logical operations (analyze, synthesize, abstract, generalize and classify), can formulate hypothesis, improvise on different information, find original solutions and encompass one's own problems in the context of general problems. (Svence, 2003)

The authors of this paper will continue by looking at three components of cognitive process- features of perception, memory and thinking- more in detail to make sure if creating of cognitive maps is "friendly" for processes of our brain.

Meikšāne characterizes perception as a process of cognition that becomes apparent at the moment of reflection of things and phenomena, when perception functions on organs of senses. To make the process of perception more effective a lecturer should keep in mind several features of perception. One of the features of perception is optional nature of choice of perception, which means that each listener during perception selects what is related to his own interests and needs.

That is why a lecturer's task is to lead the process of perception purposefully, highlighting objects of perception from the background. (Meikšāne, 1998)

People perceive the surrounding world with the help of sensations, five senses. Visual, auditory and kinesthetic system of perception dominates, although the brain can use any of the five senses. Everybody of us has one dominating type of perception. Usually visual perception is dominating for 29% of students, auditory perception for 34%, kinesthetic perception for 37% of students. Each person has one dominating system of perception, but that does not mean that a person cannot use other systems as well. We cannot declare that one system is better than others. However people usually choose one particular system. This choice is instinctive.

"When people feel relaxed they perceive new information and ideas easier. State of relaxed attention is optimal for studies – responsible tasks and low level of stress."(Smith, 2000:11)

The ideas of cognitive psychologist Miller about dividing information into "chunks" and limited ability of short- term memory to save information became a basic idea in the theory about memory. Miller (1956) wrote about person's ability to remember and record information in short-term memory is related to number 7. Vorobjovs as well refers to number 7 in connection with recording of information and concludes that after reading a text for the first time a person can remember 7 + - 2 separate items on average. (Vorobjovs, 1996)

The basic process of memory is memorization, when person's experience is recorded and a new knowledge is connected to the previous knowledge. Memorization can be short- term or long-term, unintentional and intentional.

A well- known fact is that information having emotional shade- positive or negative can be memorized easier. Men and women have distinctions -men remember negative events longer, women, on the contrary, forget negative events faster.

"Memory can be oriented towards memorization and storing of the information coming from sensations and perception or the information coming from thinking and imagination."(Vorobjovs, 1996:87)

"An increase in the use of written language meant that information could be stored and retrieved at different times. The printing press, the computer and the internet have all taken the strain off the need to remember an extended number of things," notices Turner. (Turner, 2002:1)

Thinking can be described as a process of psychological cognition when generalized and indirect reflection becomes apparent with the help of speech. A word is a basic element of a speech. But separate words cannot express a complicated thought. That is possible only by using a

combination of words, a language. Language as a system materializes itself in a speech. One of the functions of a speech is an ability "to serve" thinking. (Vorobjovs, 1996)

Operations of thinking are: analysis, synthesis, comparison and generalization. A problem situation should arise to make thinking operations join in a process. Three simultaneous conditions determine the process. They are as follows:

- Appearance of a new unknown fact or phenomenon;
- Uncertainty of ways to find out information about this fact or phenomenon;
- Person's attitude and willingness to find out the new information.

Turner draws attention to "easy access to information that can cut down the time it takes to find it. However, we also have to process more kinds of information- visual, verbal, cultural and social- and sort out the connections between them in more complex ways."(Turner, 2002:2)

Researcher Fisher connects thinking with cognitive development. Students should be helped to arrange concepts and thoughts in systems. Creating cognitive maps is one of the methods to develop learning skills. (Fisher, 2005)

To understand how to link together and apply this process for the improvement of foreign language acquisition, it is necessary to speak about mind maps or cognitive maps. Mind maps have different names. They are called concept or semantic maps, knowledge maps, net or cluster of words, mind maps, mind links, memory maps, cognitive maps etc. Tolman introduced a term "cognitive map" in 1940s of the 20^{th} century. Dr. Allan Collins and Ross Quillian developed the theory of semantic net in 1960s. Dr. Allan Collins is regarded as a creator of modern cognitive maps due to his contribution and published researches. A well-known British author of psychological publications Tony Buzan as well can be regarded as a creator of modern mind maps. He has written several books about the advantages of this method.

Researcher Fisher believes that all the processes encompassing thought in diagrams can be called cognitive maps. Cognitive maps try to describe visually or graphically mutual links between ideas or concepts. When basic words and concepts are identified, it is easier to use language for making notes as well as for thinking, learning and memorizing. (Fisher, 2005)

Researchers give different clues how to make maps although visualization is a uniting component. A map is a visual arrangement of different figures, for example: rectangles, triangles, circles etc. Lines and/ or arrows are drawn from one figure to another or among several figures. Previously mentioned Buzan has worked out exact guidelines for making maps. For example, all the connecting lines become thinner farther from the centre. Concepts expressed by one word are

written above the corresponding line. A line and a word are of the same length. Creative approach and usage of different colours (at least three) are essential.

According to the carried out researches there is not the only one way that is the best. Some people prefer geometric figures the others free lines. It is closely connected with individual learning style and experience. That is why students need to be introduced to different ways how to arrange information graphically.

When you start making cognitive maps, the first step usually is to collect ideas and find links between them. The links are clearly visible and distinguishes cognitive maps from ordinary collecting of ideas.

There are 3 basic purposes why it is useful to apply cognitive maps and make the thinking process visible. They are as follows:

- To study what is known –that means to identify basic concepts, to show links between ideas and to design a meaningful scheme of what we know and understand;
- To help for planning- maps are useful when planning some activity or project, because we can arrange and group ideas and show their interconnections in the maps;
- To support evaluation- they help to evaluate experience or knowledge, reflect on basic components of the acquired knowledge or performed activities. (Fisher, 2005)

According to the theoretical sources the advantages of cognitive maps, with the main idea in the centre, are as follows:

- the main idea is clearly expressed;
- a comparative significance of ideas can be clearly shown by underlining or placing them nearer to the centre;
- a link among ideas can be clearly shown;
- a visual form makes the scheme clear;
- a structure is natural and provisional and allows additions and adaptations;
- the open nature of the process facilitates attracting of ideas;
- each scheme is individual and unique and that is why it is easier to memorize, recall into memory or revise it. (Fisher, 2005)

Consequently designing of maps promotes not passive learning and learning environment, but encourages students to be actively involved in the study process. Cognitive maps stimulate active thinking, develop cognitive skills - analysis, classification, synthesis and provide a possibility of visual communication and evaluation.

Designing of maps stimulates a flow of information from students to a teacher, from a teacher towards students and among students. Students get information, they reflect on it, interpret and connect it with their own schemes of comprehension. The most important thing is that students learn to study, visualize and arrange information. The maps can be applied in the context of every subject of the study programme. They can be useful for group discussion and promote cooperative learning, you can add information to them or change them. Moreover teachers and students can use a computer when designing maps. A map provides all-embracing frame for a language, where all the aspects of language skills- speaking, listening, reading and writing are applied in a meaningful way. (Fisher, 2005)

Materials, methods and examples of practical application of cognitive maps

The authors carried out research of theoretical sources and study course programmes, conducted questionnaire and observation of students and qualitative approach.

Both of the authors teach English to the students at Turiba University, that is why the examples of cognitive maps are created for the students of Faculties of Business Administration and International Tourism. The given map describes the themes of the study course Professional lexis (English)-2 for the students of Faculty of Business Administration. (See figure 1).

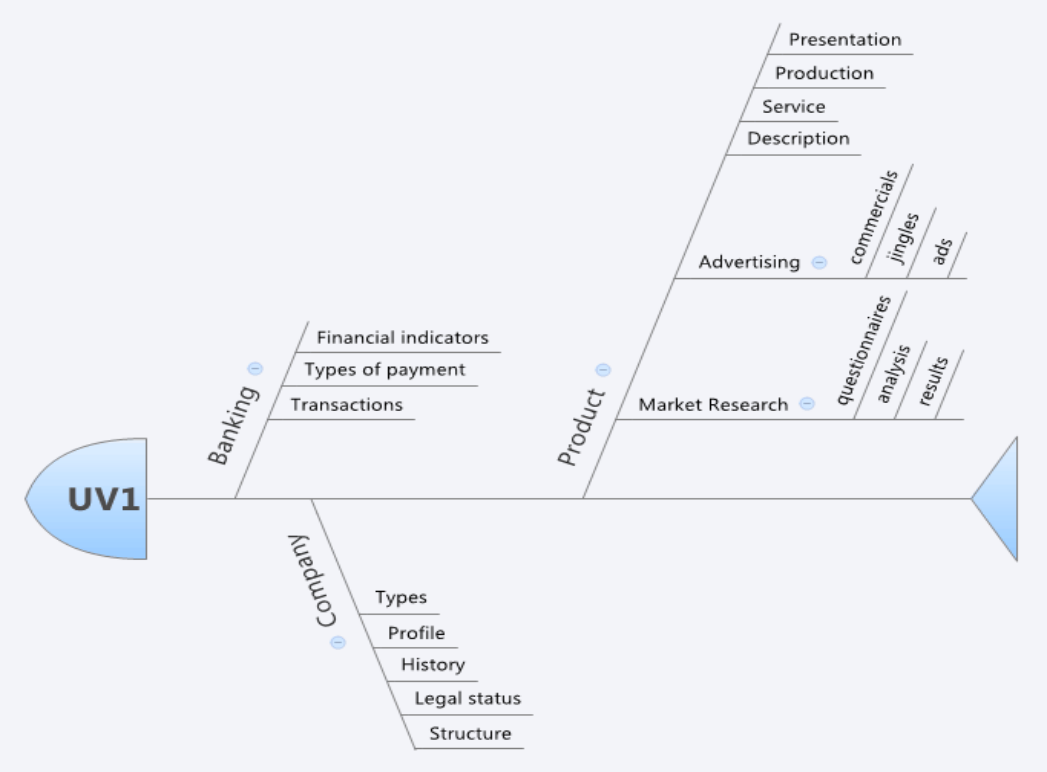


Figure 1. Themes of the second semester.

How to structure and memorize concepts

Task 1**:**While acquiring the theme “Banking”, students are divided into 3 or 4 groups, with 3 to 5 students in each group. Each group has to make a mind map of different banks, types of payment, transactions and financial indicators.

Each group presents its map by the end of the task.

You can make improvements and additions to maps. Maps can be used when revising a theme or themes before a test or exam.

Understanding the structure of the given/ read text

Task 2: While acquiring the theme “Company”, students read at home the text “The Philips Story” and make a cognitive map of the content of the text. Students are divided into groups of 3 or 4, they compare their individual maps and create the group’s map and present it later to the other groups.

Revision

Task 3: Every student makes his individual cognitive map about the covered theme, then introduces a pair mate with his map and explains its structure. All students make a summarizing mind map about all the themes covered during the semester.

Findings and discussion

27 first year students of the Faculty of International Tourism (FIT) and 12 first year students of the Faculty of Business Administration (FBA) participated in the study. There were 29 women and 10 men. The questionnaire was offered to the students during their English classes. The following questions were included in the questionnaire: how actively the students take part in the study process, if they are aware of their own learning styles, if students know how to recall information better and how to connect a new information with the previously acquired knowledge, if they know what cognitive maps are. The authors have come to a conclusion that the majority of the first year students –18 from FIT and 7 students from FBA did not know about cognitive maps and had never made them before. 14 students from FIT and 8 students from FBA admitted that knowing how to connect the new information with the acquired knowledge significantly improves their English skills. 15 first year students from FIT and 6 first year students from FBA were not sure which way of memorizing information improves their ability to recall English professional lexis more effectively.

The authors observed that for some of the students without previous experience visualization of knowledge and making/designing of maps caused difficulties. Those students copied the structure of the sample map or wrote the terms in columns because they were not sure

how to visualize the knowledge. The students were tense and not confident of their abilities. The lecturer should help the students in such a situation by creating free relaxed atmosphere, making them to feel at ease, encouraging to acquire visualization of knowledge and apply it to facilitate the learning process**.**

The students acknowledge that application of cognitive maps in the study process helps to recall, systematize and link the acquired knowledge with new information/knowledge in that way improving their own learning skills. The students admit that application of cognitive maps improves ability to memorize a large amount of information better, which is one of the preconditions for successful improvement of foreign language skills and competence.

Conclusions

Analysis of the theoretical sources for the article shows that young people of that age group have highly developed cognitive skills (perception, thinking, memory) alongside with necessary thinking operations (analysis, synthesis, comparison, generalization, classification), creativity and spontaneity. Thus, the authors have come to the following conclusions:

1. Cognitive maps stimulate thinking and develop cognitive skills: analysis, classification, synthesis, and provide a possibility of visual communication and evaluation.
2. Creation of cognitive maps facilitates learning environment and study process as a whole.
3. Concepts help to classify and arrange thoughts, and maps help to connect right and left cerebral hemisphere.
4. Ability to memorize information improves due to the similarity of thinking and mapping processes.
5. The process of mapping uses concepts, images and key words and shows connections of concepts.
6. Cognitive maps facilitate development of thinking. Words and concepts are arranged in schemes or models during the thinking process.
7. Students' foreign language skills and competence in higher school improve significantly provided that a lecturer uses different methods and positive stimuli, creates relaxed atmosphere, encourages students' active participation and cooperation in the learning - teaching process.

References

1. Fišers R.(2005) Mācīsim bērniem mācīties. Rīga: Raka.

2. Meikšāne Dz. (1998) Psiholoģija mums pašiem. Rīga: Raka.
3. Opolcere U. (2000) Mācīties ir lieliski. Rīga: AlbertsXII.
4. Smits E. (2000) Paātrināta mācīšanās klasē. Rīga: Pētergailis.
5. Svence G. (1999)Attīstības psiholoģija. Rīga: Zvaigzne ABC.
6. Svence G. (2003) Pieaugušo psiholoģija. Rīga: RaKa.
7. Vorobjovs A. (1996) Psiholoģijas pamati. Rīga: Mācību apgāds.
8. Grenfell M.& Erler L. Language Learner Strategies. Language Learning Journal. Vol.35, Nr.1. www.educationarena.com [2007.06.]
9. Miller G.A. (1956) The magic number seven, plus or minus two: Some limits on our capacity for processing information. Psychological Review,Nr. 63: 81-97
10. Turner J. How to Study: 2 Learning to Remember. Sage Research Methods Online. http://srmo.sagepub.com[2002]

FACTOR OF ACCULTURATION AND ITS MANAGEMENT WITH FOREIGN STUDENTS

Vita Balama, Dr.paed.,
professional MBA, Ventspils University College
e-mail: vitab@venta.lv

Abstract. The tertiary education of Latvia faces new challenges and dimensions in its development and sustainability one of which is the welcoming of foreign students. Their level of acculturation is the main issue for the given article. The reasons of the phenomenon of acculturation are evaluated and the forms of it -integration, assimilation, separation, and marginalization and their possible solutions are discussed. The existing experiences of the students are also explored. Culture shock is described from different viewpoints: from that of foreign students studying in Latvia and from that of Latvian students returning after a study semester or two abroad. Within the paper conclusions and recommendations for overcoming culture shock will be proposed
Key words: Acculturation, assimilation, integration, separation, marginalizaton

It is generally accepted that intercultural communication creates stress for most individuals. The individuals who engage in intercultural contacts for extended periods of time will respond to the stress in different ways. Most of them will incorporate at least some behaviours from the new culture into their own behaviour. But there are some that take on the characteristics, the norms, and even the values and beliefs of another culture willingly and easily. However, there are many who resist the new culture and retain their old ways, sometimes choosing to spend time in enclaves populated only by others like themselves. And very seldom there are some who simply find the problems of adjusting to a new culture to be intolerable, and they leave if they can.

People's reactions also change over time. That is, the initial reactions of acceptance or rejection often shift as increased contacts produce different kinds of outcomes. Such changes in the way people react to intercultural contacts are called ***adaption***. For any different behaviour there is needed a certain time of adaption called period of adaptation. For some it is very short, for some it never ends. Thus the foreign students coming to study in host country sometimes adjust very fast. It depends on how big is the basic difference between their own culture expressions: beliefs, values, history, time and space perceptions, and so on. The shorter the period of their stay in the host country for study time is, the more they appreciate it. If the foreign students have chosen longer period of stay there may appear a kind of fall back in their adaptation behaviour. Sometimes these are everyday habits of the host country people that annoy or irritate the representatives of the other culture, sometimes it is simply the language barrier for everyday purposes. Students know fairly well the language of the subjects studied, but fail during the everyday intercourse because of locals using their native language not some internatioanl language that is used during the studying process. Words such as *assimilation, adjustment, acculturation,* and even *coping* are used to

describe how individuals respond to their experiences in other cultures. Many of the terms refer to how people from one culture react to prolonged contact with those from another.

Over the years, different emotional overtones have been attached to those terms. To some people, for instance, *assimilation* is a negative outcome; to others it is positive.

Some consider *adjustment* to be „good", wheeras for others it is „bad". Anyone has to make one's own value judgement about what constitutes the right kind of outcome. The competent adjustment to another culture will vary greatly from situation to situation and from person to person. There is used the broader term of *adaption* to charcterize these adjustments because it subsumes various forms of cultural or individual adaption. *'Adaption is the process by which people establish and maintain relatively stable, helpful and mutually shared relationships with others upon relocating to an unfamiliar cultural setting.'* The definition is modified from one proposed by Young Yun Kim. (Gudykunst, Mody, 2002; Kim, 2001). This definition suggests that when individuals adapt to another culture they must learn how to 'fit" themselves into it. Different individuals and different groups will make the fit in different ways. Adaptation includes physical, biological, and social changes.

Physical changes occur because people are confronted with new physical stimuli – they eat different food, drink different water, live in different climates, and reside in different kinds of housing. These things are adapted differently also refering to the age of people under discussion. The older the person is the more obstacles he or she will find in the route of adaptation to different culture. When people are exposed to a new culture, they may undergo actual physical and biological changes. Especially if that is connected with time zone difference. People from USA or Canada when coming to Europe will suffer more discomfort as the people from European countries visiting USA or Canada. People deal with new viruses and bacteria; new foods cause new reactions and perhaps even new allergies. Social relationships change with the introduction of new people. Outgroups may become bonded with ingroups, for example, in opposition to the new outgroup members. Such changes may also cause individuals to define themselves in new and different ways. (Berry, Kim, Boski, 1988). Alternatively, the culture itself might change because of the influence of people from other cultures.

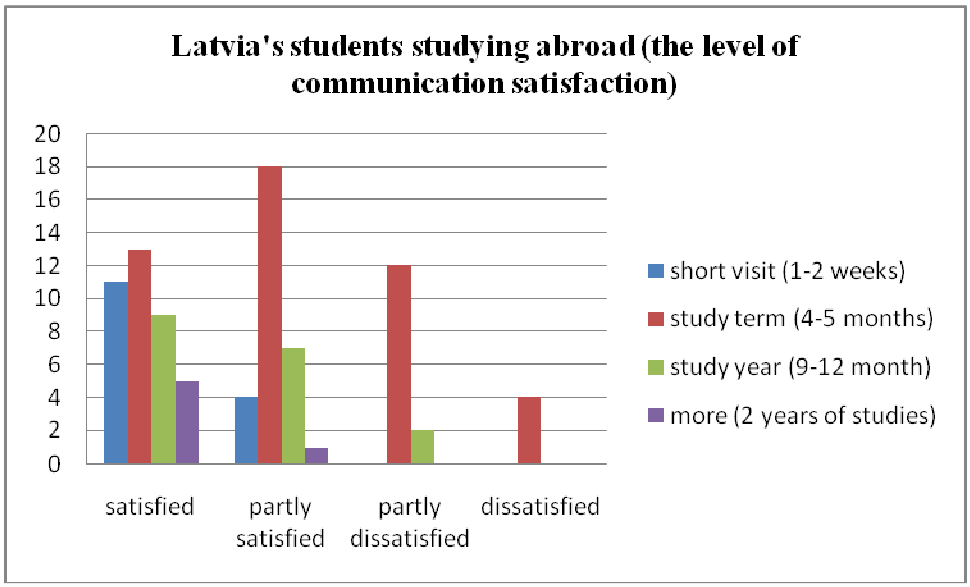
Sustained intercultural contact that requires total immersion in another culture may produce a phenomenon that has sometimes been called *culture shock*. Culture shock is formed by the anxiety that results from losing all our familiar signs and symbols of social intercourse. These signs or cues include the thousand and one ways in which we orient ourselves to the situations of daily life: when to shake hands and what to say when we meet people, when and how to give tips, how to

give orders to servants, how to make purchases, when to accept and when to refuse invitations, when to take statements seriously and when not. Now these cues, which may be words, gestures, facial expressions, customs, or norms, are acquired by all of us in the course of growing up and are as much a part of our culture as the language we speak or the beliefs we accept. All of us depend for our peace of mind and our efficiency on hundreds of these cues, most of which we are not consciously aware. (Oberg, 1960). Things taken for granted at home require virtually constant monitoring in the new culture to assure some degree of understanding. The loss of predictability, coupled with fatigue that results from the need to stay consciously focused on what would normally be taken for granted, produces the negative responses associated with culture shock. These can include

- excessive washing of the hands;
- excessive concern over drinking water, food, dishes, and bedding;
- fear of physical contact with attendants or servants;
- a feeling of helplessness and a desire for dependence on long-term residents of one's own nationality;
- fits of anger over delays and other minor frustarations;
- delay and outright refusal to learn the language of the host cuntry;
- excessive fear of being cheated, robbed, or injured;
- great concern over minor pains and eruptions of the skin;
- and finally, that terrible lomging to be home, to be able to have a good cup of coffee and a piece od apple pie, to walk into that corner drugstore, to visit one's relatives, and in general, to talk to people who really make sense. (Oberg, 1960).

Often associated with culture shock are the U-curve and W-curve hypotheses of cultural adaption. In the U-curve hypothesis, the initial intercultural contacts are characterised by a positive, almost euphoric, emotional response. As fatigue mounts and culture shock sets in, however, the individual's responses are more and more negative, until finally a low point is reached. Then gradually, the individual develops a more positive attitude and the new culture seems less foreign, until a positive emotional response once again occurs. The U-curve hypothesis has been extended to the W-curve, which includes the person's responses to her or his own culture upon return. It posits that a second wave of culture shock, which is similar to the first and has been called *re-entry shock*, may occur when the individual returns home and must readapt to the once taken-for-granted practices that can no longer be followed without question. (Koester, 1984; Martin, 1984).

Many of the students who have spent a term or two abroad on return cannot find their place for some time. They seem to have got used to different life style, different habits, values, and beliefs of their host country. And again one should bear in mind that it depends on the person and its adaptation speed, depths, and comprehension.



Pict.1. The level of communication satisfaction by students from Latvia studying abroad.

In the research there participated 86 students mainly from 3 different universities of Latvia: Latvia University (27), Ventspils University College (33) and Riga Stradina University (16) as well as 4 representatives from Liepaja University and 6 representatives from Latvia Agriculture University. Most of the respondents (54.7%) were studying abroad for a term, and as the research shows that it is the most crucial period for adaptation to foreign culture. The first satisfactory image has vanished and the more critical phase usually starts to end by the time they have to reentry their own culture again. That usually causes certain discomfort.

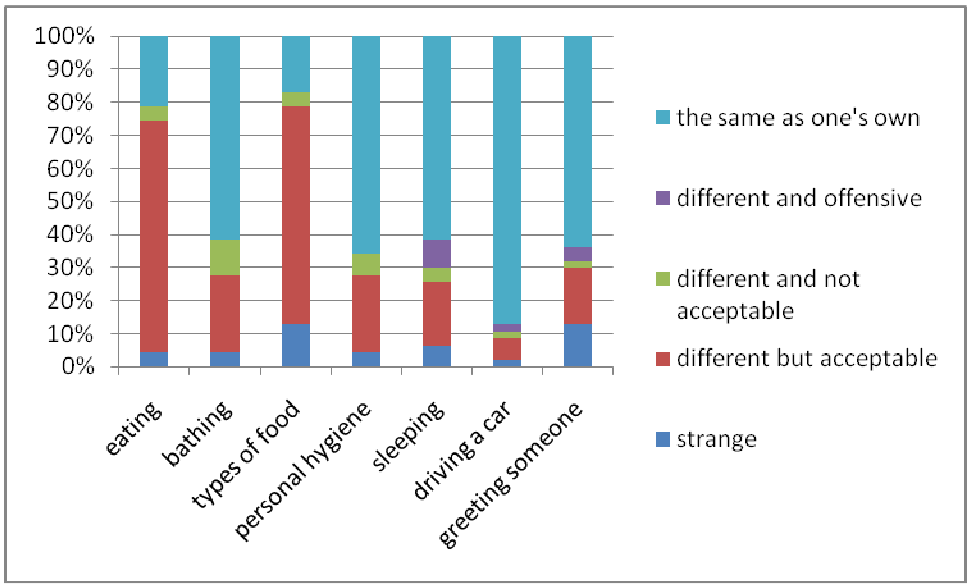
In the graph shown in picture 1 we can see that in general students are satisfied with their stay and level of communication. The students expressing dissatisfaction are among those whose stay is comparatively long- one term (4-5 months), among them usually are also those who are partly dissatisfied. This contributes to the idea about the lowest point of U-curve adaptation.

The differencies in accepting another culture usually are connected with issues in the following fields:

- Eating (how, when, with whom)
- Bathing (how, where, how often, with whom)
- Types of food (what is edible and not edible)
- Personal hygiene (daily regime, use of deodorants or perfumes, teeth cleaning, etc.)
- Sleeping (where, how, with whom)
- Driving a car (who, which side of the road, how fast)
- Greeting someone (how, whom, when, why)

Evaluation of these issues were carried out and regarded as (1) strange, (2) different, but acceptable, (3) different and not acceptable, (4) different and offensive, and (5) the same as one's own.

For the fact that most usually students go to study only for one term, further the data analysis is given only for this group of respondents although other results of the research are also available.



Picture 2. Everyday issues determining the comfort of adaptation for students living abroad for 4-5 months' period.

As it is seen from the graph displayed in picture 2, most of the everyday activities seemed to be almost the same as those of their own culture except the food and eating habits. In some cases the way of sleeping habits were annoying (going to bed too late, having the pet in the bed, very loud neighbours and late studying of the roommates). In two cases the greeting of the persons were

not acceptable at all. In another case it turned out to be driving a car that caused the most of the problems, because of regular violation of traffic rules and even minor accidents in the street and parking allotment. The analysis of such responses gives really true and basic insight into the process of adaptation and at the same time points out the issues to be avoided in the future. It gives the basis for future culture studies and exemplifies the existing theories.

Though initially regarded as plausible, the U-curve and the W-curve hypotheses do not provide sufficiently accurate descriptions of the adaption process. They do not account, for instance for those whose experiences remain favorable, for those who fail to adapt and return home prematurely, or for those whose level of discomfort changes little during the adaptation period. Rather there seem to be a variety of possible adaption patterns that individuals could experience, depending on their particular circumstances. The pattern of adaption varies widely from one individual to the next and therefore no single pattern can be said to characterize the typical adaption process. (Nash, 1991). There is also ample evidence to suggest that the adaption process has multiple dimensions or factors associated with it. For example, Mitchell R.Hammer, William B.Gudykunst, and Richard L.Wiseman have suggested that intercultural effectiveness consists of three such dimensions: the ability to deal with psychological stress, skill in communicating with others both effectively and appropriately, and proficiency in establishing interpersonal relationships. (Hammer, Gudykunst, Wiseman, 1978).

Colleen Ward and her colleagues have identified just two dimensions of adaption:psychological and sociocultural. The former is similar to Hammer and his colleagues' first diemnsion, and the latter seems to combine the remaining two. (Ward, Kennedy, 1999). Despite such distinctions, however, the adaptation process has usually been viewed as a single „package" of related features that allow the same trajectory of change for a given individual. However, distinct patterns of change likely characterize each dimension of adaptation.

Answers on two important questions shape the response of individuals and groups to prolonged intercultural contact, thus producing different outcomes. The first concern is whether it is considered important to maintain one's cultural identity and to dispaly its characteristics. The second concern involves whether people believe it is important to maintain relationships with their outgroups. (Berry, Kim, Boski, 1988).

There exist four major types of adaptation: assimilation, integration, separation, and marginalization.

Assimilation occurs when it is deemed realtively unimportant to maintain one's original cultural identity but it is important to establish and maintain relationships with other cultures.

Assimilation means taking on the new culture's beliefs, values and norms. In the research carried out by the author there were no real cases of assimilation observed but that does not exclude the fact that such type of adaption exist. This definite type of adaption refers more to those whose come to live and survive in another culture for longer period or life time.

When an individual or group retains its original cultural identity while seeking to maintain harmonious relationships with other cultures, *integration* occurs. Integration produces distinguishable cultural groups that work cooperatively to ensure that the society and the individuals continue to function well. There the students under discussion showed significant acknowledgement to the expressed ideas of cooperation and understanding among different nations. Both integration and assimilation promote harmony and result in an appropriate fit of individuals and groups to the larger culture.

When individuals or groups do not want to maintain positive relationships with members of other groups, the outcomes are different. If a culture does not want positive realtionships with another culture and if it also wishes to retain its cultural characteristics, *separation* may result. If the separation occurs because the more politically and economically powerful culture does not want the intercultural contact, the result of the forced separation is called *segregation*. If, however, a non-dominant group chooses not to participate in the larger society in order to retain its own way of life, the separation is called *seclusion*. When individuals or groups neither retain their cultural heritage nor maintain positive contacts with the other groups, *marginalization* occurs. The form of adaptation is characterized by confusion and alienation. The latter two types mentioned above did not appear with the respondents of the research, because the students who go for studying abroad are well-educated and prepared to face different culture, still there appeared some confusions and misunderstandings as discussed previously and showed in the picture 2.

Conclusions

1. Successful management of culture shock depends on an awareness of its possible existance thus its symptoms and the degree of its severity.
2. The effective adaptation process takes place when the host culture and the local environment is studied carefully. It could be promoted by mastering verbal and nonverbal language skills.
3. For better adaptation it is essential to develop intercultural relationships as well as maintain an intimate social network.

4. When adapting to different culture it is necessary to assume the principle of difference, sometimes simply remember one's own perceptual context.
5. The research showed that those who anticipated failure events better adapted to different culture.

References

1. Berry J. W., Kim U., and Boski P., „Psychological Acculturation of Immigrants," Cross-Cultural Adaption:Current Approaches, ed. Young Yun Kim and William B.Gudykunst (Newbury Park, CA:Sage, 1988)
2. Gudykunst W. B. and Mody B., Handbook of International and Intercultural Communication, 2nd ed., ed. William B. Gudykunst and Bella Mody (Thousand Oaks, CA: Sage, 2002), 260 p.;
3. Hammer M. R., Gudykunst W. B., and Wiseman R L., „Dimensions of Intercultural Effectiveness:An Exploratory Study." International Journal of Intercultural Relations 2 (1978): 382-393 pp.
4. Kim Y. Y., Becoming Intercultural: An Integrative Theory of Communication and Cross-Cultural Adaption (Thousand Oaks, CA: Sage, 2001), 31 p..
5. Koester J., „Communication and the Intercultural Reentry: A Course Proposal," Communication Education 23 (1984): 251-256pp.
6. Martin J. N., „The Intercultural Reentry:Conceptualizations and Suggestions for Future Research," International Journal of Intercultural Relations 8 (1984): 115-134 pp.
7. Nash D., „The Course of Sojourner adaption: A New Test of the U-Curve Hypothesis," Human Organization 50 (1991): 283-286 pp.
8. Oberg K., „Cultural Shock: Adjustment to New Cultural Environments," Practical Antropology 7 (1960): 176 p.
9. Ward C. and Kennedy A., „ The Measurement of Sociocultural Adaption," International Journal of Intercultural Relations 23 (1999):659-677 pp.

ANALYSIS OF PROFESSIONAL COMPETENCES OF LABOUR PROTECTION SPECIALISTS

Imants Bērtaitis pr.Mg.ing. LLU, Faculty of Forestry, Akadēmijas Street 11, Jelgava, imants.bertaitis@llu.lv, tel. 29125071

Abstract. The number of occupational diseases and accidents occurring at work in the Republic of Latvia are decreasing from year to year, nevertheless it is one of the highest in the European Union. This is due to several reasons e.g. insufficient competence of employees, employers and also labour protection specialists. Determination of competences is particularly important when taking into account the necessity to define learning outcomes in all educational programs in accordance with the European Qualifications Framework (EQF) and the National Qualifications Framework of Latvia developed on its basis in 2010.
In order to reduce risk of injuries and occupational diseases at work, labour protection specialists in cooperation with employers and employees have to ensure safe work environment. To be able to fully carry out these tasks, labour protection specialists have to be competent. Labour protection specialists have to possess various competences as they have to draw employees and employers` attention to the places that are dangerous in a technological process, to explain legal requirements to be followed at work and they also have to provide professional instructions to employees. The aim of the research is to determine the competences that labour protection specialists have to possess, carry out the analysis of possibilities to acquire these competences and determine their conformity with the EQF.
Keywords: labour protection, competences, education of labour protection specialist, the EQF.

Introduction

With the development of new technologies the scope of knowledge required for performing work reduces, which, in its turn, leads to work specialization. At the same time, this knowledge should become more profound. There might even be cases when an employee is not familiar with all technological process. Whereas labour protection specialists are in a completely different situation, according to the legislation they can work in different areas without specializing in a certain area. This means these specialists have to have multi-disciplinary knowledge and skills so that they would be able to understand a technological process and be aware of the places that may endanger employees` health and safety. When inspecting the duties a specialist in labour protection has to perform, we see that they have to apply knowledge that covers a wide range of scientific disciplines. We can say that the competences of a specialist in labour protection are comprised of many inter-related competencies.

Research methods

Research methods comprise reflection from personal experience and analysis of literature sources.

Results and discussion

The concept "competence" has recently been analyzed as a social pedagogical problem. New social processes occur in modern society and give a new meaning to the term “competence”.

Opinions determine the concept of competence, its nature, content and formation conditions:

- ✓ awareness of the value of lifelong learning;
- ✓ active involvement in the process of personal development thus emphasizing qualitative human activity,
- ✓ formation of common educational space as a result of socio-economic processes, availability of common information, etc.

The concept of competence gets a new content and has higher demands, and forms in a wider social environment.

In modern society the concept of competence emerges in a new quality, as it is characterized by a shift of scientific paradigm.

Paradigm shift is understood as a model of thinking of a certain age, a world scene, a cultural activity or a scientific view of the world.

Scientific theory mentions signs of the shift of paradigm:

- ✓ the phenomena that cannot be explained by the existing theories turn up in scientific development process;
- ✓ new scientific evidence facilitate search for new research methods;
- ✓ scientific study of the phenomena and scientific understanding are expanding and changing.

We can formulate competence as skills, knowledge and attitudes that can be acquired and successfully applied.

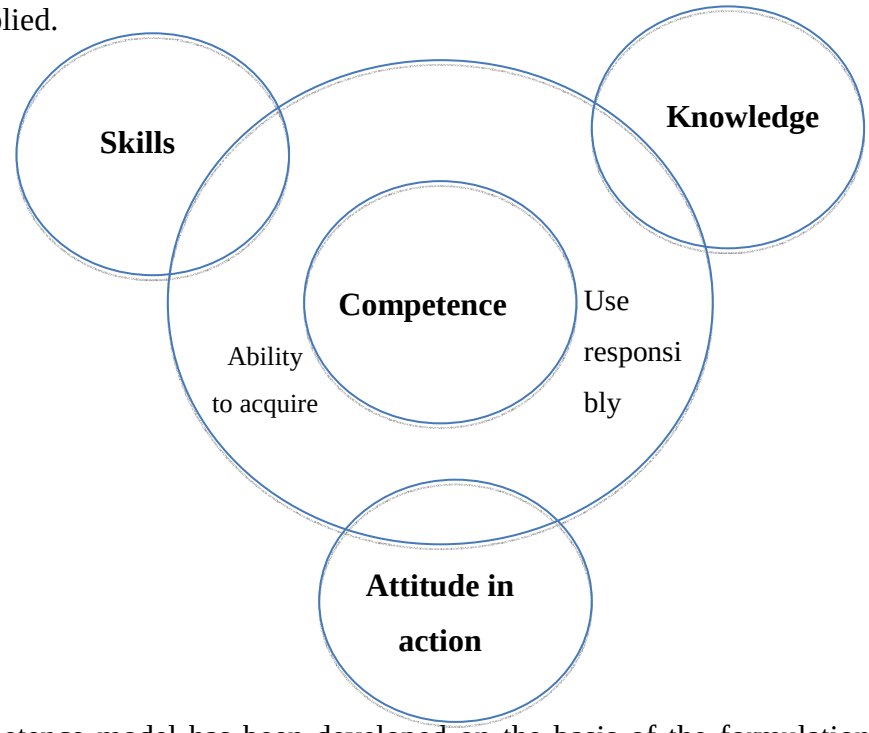


Fig.1 The competence model has been developed on the basis of the formulation of competence given by B. Briede

When speaking about competence categories, they have to be classified. Classification of competences should be understood as a reflection of the content of competence from "general" to "special" and "specific".

Classifications tend to be "generalizational" and "target orientated". "General/ generalizational classification" reflects a logical order of the system of objects including three types of meta-classification.

1. Between equipollent single-level objects (processes).
2. Between different objects of the same level.
3. Between different objects of different levels.

This general/ generalizational classification will have the status of fundamental law. This general/ generalizational classification based on the fundamental laws of natural sciences becomes Mendeleev Periodic System of Chemical Elements.

Target orientated classification is used to manage and explore a variety of operations. The relationship between the "general/ generalizational classification" and "target orientated classification" shows the connection between nature and phenomena. The more thoroughly the classification shows a diversity of “nature” of phenomena to be classified, the more distinct its proximity to the general/ generalizational classification is. The less "nature" classification has, the more it approaches artificial or target oriented classification. If a classification is described as more introverted, it can be more described as extrovert. (Subetto. A.I. 1994)

The more extrovert is the classification, the stronger it is, while introvert classifications allow understanding the nature of classifications. Classifications can be general, superficial i.e. intended for showing off, or substantial and fundamental i.e. profound. The movement of classification process in the coordinate system from extrovert to introvert is a reflection of the classification process from external signs, i.e. classification of the main qualities, to internal phenomena, the main qualities of the classification. In fact, it is the movement of classification from external qualities to internal qualities of the objects to be classified.

A postulate of mono-qualitative and multi-qualitative unity, based on the principle internal-external assumptions, acquires a new interpretation in the dynamics of qualification process. This interpretation manifests itself as the extrovert classification, whose diversity is reflected in the classification of multi-qualitative objects, including their external qualities, while the introvert classification, whose uniformity is ideally reflected by the classification of mono-qualitative objects, including their essential (internal) qualities.

Using theory of Meta classification, the classification model of competences labour protection specialist should have was developed.

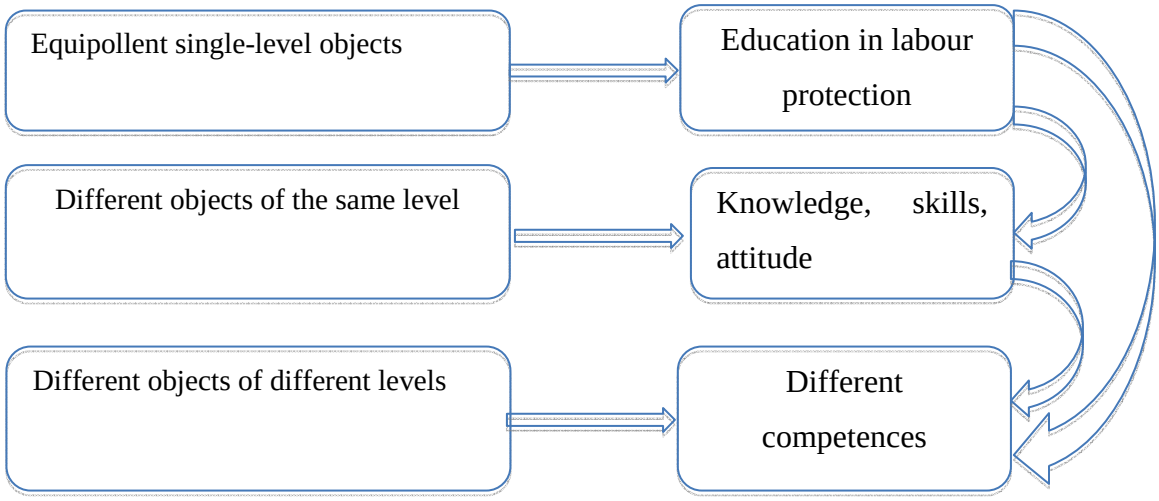


Fig.2 The classification model used to classify competences possessed by labour protection specialists is based on three Meta classification types by Subetto A.I., this is the author's interpretation.

According to legislation the following skills are mentioned as a competency-building elements for labor protection specialists:

- ✓ ability to run a business in such a way as to ensure a safe and healthy working environment;
- ✓ ability to plan business activities in such a way as to ensure safe and healthy working environment;
- ✓ to organize business activities in such a way as to ensure safe and healthy working environment;
- ✓ implementation of business activities so that safe and healthy working environment is ensured.

While carrying out analysis of the occupational standard a classification model of the competences of labour protection specialists from the general to special and specific was developed.

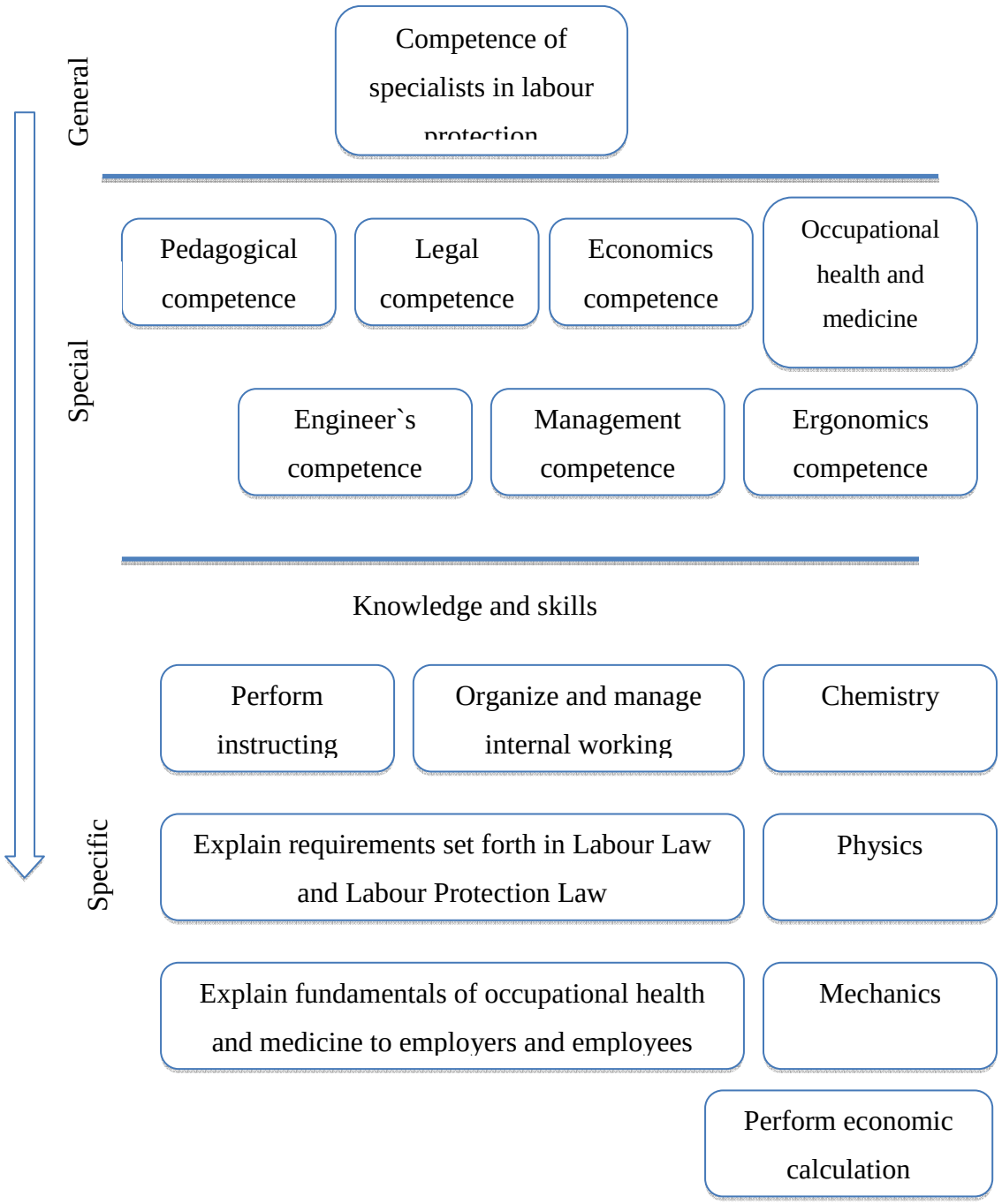


Fig. 3 The classification model of the competences of labor protection specialists, the author`s research

Starting with 2010 European Qualifications Framework for lifelong learning (EQF) is being introduced with the aim to make the process of moving to another country or changing a job easier

for students and employees, as well as to facilitate the possibility to start studying in another educational establishment.

Eight reference levels will be used in the EQF which are based on the results of learning processes (defined in connection with knowledge, skills and competence). The EQF “learning outcomes” are defined as formulations on what students know, understand and are able to do after completion of the training, so a greater emphasis is laid on learning outcomes rather than on learning process (length of training session). Learning outcomes are divided into three categories:

1. knowledge;
2. skills;
3. competences.

This suggests that qualifications (in different combinations) cover a wide range of learning outcomes, including theoretical knowledge, practical and technical skills as well as social skills, most important of which is the ability to cooperate.

Conclusions

1. The new "competence” fully complies with the EQF.

2. The specific skills, a specialist in labour protection must have, comprise a number of scientific disciplines.

3. The current education system does not provide labour protection specialists with possibility to acquire comprehensive skills in labour protection.

The study was financially supported by the ESF project “Support for doctoral programme realization of Latvia University of Agriculture (04,4-08/EF2.D2.35)”

References

1. Субетто А.И. Системогенетика и теория циклов. Ч.1,2. – М.: Исследо- ват. центр проблем кач-ва под-ки спец-ов, 1994. – 248с.; 260с.
2. Research carried out by the Ministry of Welfare "Darba apstākļi un riski Latvijā " (Working Conditions and Risks in Latvia") 2007.
3. http://www.lm.gov.lv/upload/darba_devejiem/20101115_komp_spec.pdf skatīts 12.05.2011
4. http://ec.europa.eu/education/pub/pdf/general/eqf/broch_lv.pdf skatīts 15.052011
5. Bremzes S., Grasmane D., Turusheva L. *„Professional Competence of Future Managers of External Relations".*//Proceedings of the international Csientific Conference „Social Integration in an Expanding Europe". *Latvian University of Agriculture, Faculty of Social Sciences,* 21-22 May, 2004.-Jelgava, p. 124.-132.
6. W. Knöchel: Qualifikation, Kompetenz und Weiterbildung. Schriften zur beruflichen Aus- und Weiterbildung, Band 21. Innovationstransfer- und Forschungsinstitut für berufliche Aus- und Weiterbildung. Schwerin 1996
7. J. Erpenbeck/V. Heyse: Berufliche Weiterbildung und berufliche Kompetenzentwicklung. In: AG QUEM (Hrsg.): Kompetenzentwicklung '96. Strukturwandel und Trends in der betrieblichen Weiterbildung. Berlin 1996

8. G. Albrecht/H. J. Buggenhagen/V. Mirschel: Berufliche Kompetenzentwicklung. Anspruch an neue Kriterien und Instrumentarien zur Leistungsermittlung und -bewertung. Gutachten an die Arbeitsgemeinschaft Betriebliche Weiterbildungsforschung e.V. Berlin 1997
9. R. Arnold: Von der Weiterbildung zur Kompetenzentwicklung — neue Denkmodelle und Gestaltungsansätze in einem sich verändernden Handlungsfeld. Gutachten für die Arbeitsgemeinschaft Betriebliche Weiterbildungsforschung e. V. Kaiserslautern 1997

PEDAGOGICAL ASPECTS OF E-LEARNING IN HIGHER EDUCATION

E-STUDIJU PEDAGOĢISKIE ASPEKTI AUGSTĀKAJĀ IZGLĪTĪBĀ

Sarmīte Bremze
Latvia University of Agriculture, Lielā iela 2, Jelgava, LV-3002
e-mail: sarma325@cs.llu.lv, tel.:+37163005650

Abstract. The IT boom in the world has contributed to the wider application and development of e-learning/e-studies in the higher education of Latvia as well. *E-studies are the studies, which take place with the application of electronic technologies: telecommunication and computer networks, radio and TV, video records, interactive TV and multimedia CD-ROM.* In some countries e-studies are understood as online studies in the network. An especially organized virtual environment is an *essential feature of e-studies*, interactive study materials for instructors and students self-study, possibilities of self-assessment for both and the support of instructors in the study process.
E-study principles enter Latvian higher education institutions slowly, however. It is stressed by specialists – during the next years students and lecturers more and more will discover the opportunities offered by modern technology. Practically it is: the instructor is reading the lecture face-to-face, but the variety of study materials, tests, group work and project development is organized virtually: discussion forums, chats with instructors and classmates, etc. Twenty years ago the telephone and fax, radio and TV, audio and later video were technologies characteristic of *distance learning*. It was possible to achieve a remarkable improvement in the quality of studies.
E-studies/e-learning is more than only business. The *new teaching methodology* is characteristic to this form of learning, which differs from full-time study. Via e-learning the student acquires the necessary information society added value of education – learns not only the subject matter, but also learns how to work with new technologies. In Latvian universities e-studies are realized in different versions. One of the most common is the acquisition of study courses attending lectures in person at the university as well as working in a virtual environment.
The problem with e-studies is that in Latvian universities, it is necessary not only to explore new technologies and to acquire new study habits, but also to encourage not only students but also the lecturers themselves to use the new study technology. The latest trends show that study work is increasingly switched to the virtual environment, but that does not mean that, thinking about the quality of studies, the "effect of presence" will disappear, which cannot be provided by e-studies without the sufficient "effect of presence" of the lecturer. Students wish to mix- face-to-face lectures where the teacher can be asked what they do not understand and also work in a virtual environment. That is the way to make study process more effective and to improve the quality of specific courses.
E–study is becoming more and more popular in the world. However, aiming for maximum quality, such studies recquires large capital investments in different sectors as well.
Key words: education, technologies, e-learning, instructors, motivation

Introduction

The author`s intention is to study pedagogical aspects of e-learning on a larger scale – to look at them on the world scale, through the articles published in the Proceedings of the conferences which take place regularly in different countries of the world, and to look at not only the instructors` attitude but the business world/people point of view toward such a form of study as e-learning is, and study the ways of the instructors` encouragement to use e-learning as a new approach to study process or only a new form of study. E-studies or e-learning or Distance learning or e-training is used to describe similar *form of study which takes place in virtual environment and application of electronic technologies make the study process interactive.* The definition of the process allows recognize it as web-based learning taking place simultaneously all over the world for about twenty years already. Research was carried out to study pedagogical issues concerning

encouragement of students and lecturers to apply new study technologies and also to touch upon and to examine pedagogical issues, to reconsider them, therefore different literature sources revealing different views of different authors from all around the world were analyzed.

The **aim** of the research is to study pedagogical aspects of e-learning in order to introduce (tell about) them to Latvian academic community, revealing their similarity all around the world, mainly focussing/drawing attention to some the instructors have while dealing with techologies as well as with students motivation, encouraging them to apply e-training in their studies.

Research methods

Investigation of the events reflecting e-learning in the world and illumination of the published materials in the Proceedings of the conferences devoted to application of technologies in study process, analysis and selection were carried out. The author of the given study carried out the review of the latest reports, published during last twenty years, articles and other kinds of publications on the topic under discussion related to e-learning and blended learning environments. Literature analysis is presented to assist the reader to reveal and appraise importance of instructor`s and the learner`s motivation as well, in the success of e-learning and blended learning courses. From the selection of evidences it is expected to conclude, that student motivation is resulting from the lecturer`s willingness and competence to apply technologies in study process being a major factor for e-learning and blended learning success. The results of the report have to alert the reader, that student success and quality of the study process, in e-learning environment, is heavily related to course layout and accessibility as well. The author of the article tries to provide a summary of current research on the topics of e-learning and blended learning while also the role of instructor in encouragement of students is stressed.

Results and Discussion

Not only in Latvia and other European countries but also in America, application of the latest technologies in e-learning in Corporate, Government, Healthcare, and Higher Education are widely discussed at forums of different scale, as well as on regular basis at the World Conferences on e-learning. Canadian scholar Sir John Daniel (Commonwealth of Learning, Canada), at „World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2009" proposed the following issues for discussion: „What is technology and what are its strengths? ... Technology in a people-centred way and Adam Smith's analysis of technology in terms of division of labour, specialisation, economies of scale and machines. In other areas of life technology has

used these principles to increase access, improve quality and lower costs. Is this true of e-learning?" (Daniel, 2009) E-training is considered nowadays as a very important issue for business organization in such a remoted country for Europeans as Jordan is in the Arabian world. *Osama Harfoushi, Ruba Obiedat* (Jordan) have researched organization's acceptance of the new training system before implementing it. System`s functionality of organisation, finance resources, human resources, their potential/capabilities, regarded as pedagogical preconditions of the successful study environment, in their research were proved being the main factors which affect e-training acceptance. „E-training is considered nowadays as a very important issue for business organization because of the benefits it can bring. Unfortunately, e-training is not fit well in most of Jordanian organization. In order to implement e-training successfully in an organization, you need the right people at the right place using the right resources. Furthermore, it is essential to measure the organization's acceptance for the new e-training system before implementing it in order to gain its full potential. The research proposes a model to measure an organization's acceptance for a new e-training system. The model has been developed from various previous studies and then it has been tested using quantitative methods (questionnaire). The studied factors which are believed to affect the e-training acceptance are: System Functionality, Finance Resources and Human capabilities." (Harfoushi, Obiedat, 2011) Not only for business organization but also for the university, which nowadays is also regarded as a business organisation, e-studies/e-learning is more than only business. *New teaching and learning methodology* becomes a challenge in this form of learning, which differs from full-time studies at the university. Via e-learning the student is encouraged to acquire added value of education, so necessary for web-based learning and on-line work in information society, to learn not only the subject matter, not only acquire the content but also to learn how to work with new technologies. „Many colleges and universities are now investing more in e-learning and blended learning courses. For a course to be worth the investment the institution must first recognize the most important factors to consider while developing the course. Of all the factors considered while developing a course the student must be considered as the most critical."(Shivetts, 2011) Technology is changing higher education in many ways. Distance education has become common. Curtis J. Bonk, a professor of instructional systems technology at Indiana University (US), surveyed the landscape in „The World Is Open: How Web Technology is Revolutionizing Education (Jossey–Bass)." (Bonk, 2009) and drew educators attention to the development of instructional systems technology market and education expenditure on e-learning acceleration from 5% of total expenditure to 50% and the capacity of quality improvement and frameworks which had to have some "innovative consideration" as well.

"Harness DisruptiveTechnologies"

With the present changes taking place in both the US and the UK (read: European) education systems, it is interesting to look back to see where they have arrived at in, as called by some authors, "Harnessing Technology" or "Disrupting Class" as education systems looked to adaptation and evolvement, according to their opinion, to „the massive changes technology is bringing to learners lives and how they live them and consequently how and where they learn."(Becta, 2008). It is almost full marks to the Becta research team in their analysis of the trends most likely to impact upon young people, while they certainly picked up the trend toward mobile devices. The Becta research related to the learner and the learner's context, identified four emergent or potential future trends: 1) consumption of multiple technologies by young people; 2) increased dependence of young people on mobile technologies for online social networking; 3) increased parental encouragement of their primary age children's educational uses of computers in the home; 4) increased use of TV-on-demand by young people in the home. American scholar Clayton M. Christensen (US), by contrast, had delved deeply into the malaise he believed that was effecting the US education system at that time and Latvian at present, beyond simply looking at the impact of emerging technologies on the lives of learners and how they could be used to support learning. Interestingly his solutions were aimed not at harnessing emerging technologies for learning, but at the school system itself (by disrupting it) and centred principally on giving schools the right framework to innovate. Learning Platforms creation was regarded as one of innovative intuitive tools to create learning content with modes to allow, for delivery, in some form of content exchange, model emerge. Into the concept of the platforms social learning environments were included to allow collaborative content development and collaborative learning and collaborative peer to peer sharing of learning, and also support the exchange and delivery of learning over a multitude of differing devices at the Latvian universities as well. It should be noted, that the next generation of learning platform, given the speed of technology and, in fact all (and much much more) of the requirements, could be met in the corporate e-learning market already. The challenge was in firstly giving the universities in Latvia the right infrastructure in which to innovate in: Academies, Free Schools or Virtual Schools, etc. Consequently pedagogical aspects concerning schools to discuss were: 1) exploration of new technologies, 2) motivation and encouragement of teachers to use new study technology, 3) encouragement of pupils to use new study technology, 4) acquisition of new studying habits using new study technology, 5) making of the study process more efficient (personalizing it), 6) the quality of schooling, 7) improvement of the quality of specific courses. It should also be noted, that knowledge and training skills/techniques acquired at

school form basis for university studies. Learning results are of the utmost importance for school, for well developed content and information exchange mechanisms in the form of acquired information technology skills as study links are important for students, therefore it is so important for the assessment of university study outcomes to examine learning process at school.

Technology assists to develop study skills

Developed content and exchange mechanism was viewed by Christensen as the second stage disruption of the classroom. Indeed the work of Professor Sugata Mitra's "Hole in the Wall" experiments had shown that," in the absence of supervision or formal teaching, the children can teach themselves and each other, if they're motivated by curiosity and peer interest". (Christensen, 2008) The first stage of disruption in Christensen's model was broadly how ICT was deployed in the classroom, with computer based learning replacing monolithic learning. As it was pointed out by him, that this was driven or rather made possible by the falling prices of computers, e-learning content (and a parallel recognition that e-learning had improved in quality), but was driven ultimately by budgetary constraints (and looming teacher shortages in the US) – in short – technology was substituting the teacher at school and the instructor at the university. Christensen predicted that technologies share of the education budget in the US would grow from 5% to 50%, and the flip in the substitution curve would begin in 2012! It would be noted, that a new virtuous circle of demand emerged that promoted both: a growing demand for e-learning content due to its cost saving, leading in turn to a fall in e-learning content prices due to the rise in demand and an ever improving quality of learning materials (development of E-study content in the form of study courses) and technology (including the development of students` self-directed study skills) to create e-learning, improves in Latvian universities as well.

In the corporate market

In the corporate market of the world, the impact of the 2008-2009 economic crisis saw massive downward pressure on corporate training budgets and a consequent strong uptake of e-learning and other web based communication technologies. Technology did in some ways replaced the trainer, - will technology now replace the teacher, or, at least, fill any of the gaps? Time will tell. Perhaps the US education system would benefit by looking at many of the excellent research papers to give learner perspective and explain how education systems can harness new technologies for learning. And, perhaps, the UK schools could look toward the US for new school models for the emerging Academies and Free Schools as how to innovate and differentiate disruptively! Any

company or organisation that can bridge countries in learning technologies should be highly valued as the opportunity to share best practise from both education systems would be of huge value. (BECTA, 2011) Perhaps not only European but also Latvian education system would also benefit by studying experience of both: the UK and the US schools and new school models not only in secondary but also in higher education. However, **it is interesting to note** that while the BECTA researchers focused on how emergent consumer technologies could be harnessed to support learning, Christensen looked for the development and adaptation of new solutions from the software developer market as opposed to the consumer market and in particular "Applications" – pieces of sophisticated software developed for specific purposes. (Not APPS as so often associated with i-phones).To Christensen the ability to deliver personalised learning or student centred learning is paramount and to provide platforms of tools that will enable non-professionals (by this he means non-professional software developers) "to create software that helps different types of learners" is one of key themes. Christensen **argues**, that „these tutor tools are likely to emerge as some form of virtual tutoring" (Christensen, 2008). According to research published by Ambient Insight (See http://www.youtube.com/watch?v=gtVYkEdGtfo) tools and vitally mechanisms for their exchange – via learner user networks will grow in the future and become enhanced as learners and teachers will also contribute to content development and catering for all types and styles of learner. **Virtual schools – already a strong trend in the US** model is believable and likely to only accelerate and can be regarded as e-learning model in Latvian higher education as well.

Two sides of the same coin

Many excellent BECTA reports addressing school and college use of e-learning and learning technologies offered a vision of an insightful vision of the future (see the 2008 report "*Analysis of emerging trends affecting the use of technology in education. Research to support the delivery and development of Harnessing Technology: Next Generation Learning 2008–2014")* and was perhaps one of the most accurate and forward looking pieces in terms of highlighting the up and coming trends . BECTA (and its researchers) looked at toward the US and into the UK to highlight what is believed would be the key trends in technology's use in learning and education. By contrast also in 2008 Clayton M. Christensen published his work "*Disrupting Class"*, - with the sub title "*How Disruptive Innovation will Change the Way the World Learns"*. While Christensen's sub title talks about how the world would learn, his work principally addressed the challenges and issues faced by the US education system. Indeed Christensen's introduction painted a bleak assessment of the US school system of that time. As two sides of the same coin, it has to be noted

also, that still there exists instructors` negative attitude toward introduction and application of technologies in study process. Not only in Latvia but also in the United Kingdom voices of opposition can be heard. **Susan Greener (University of Brighton, Brighton, UK),** BA, MBA, EdD, FHEA, Chartered Fellow CIPD, at present works at Brighton Business School as a lecturer in HRM, Business Context, Research Methods, Learning and Development. She is Course Director of the fully online final year undergraduate course, validated by University of Wales, with international students. Her research interests are in e-learning strategy, teacher support and development and reflective learning. In her research she had pointed out, that there would always be academic staff who manifest resistance to changes and innovation, referrinng to/dealing with technology enhanced learning which is the issue of pedagogics. „Traditional management approaches suggest that resistance is an enemy of change. However there is an increasingly attractive counter view which suggests, that, resistance is something to be explored and understood, in order that communication and understanding about the proposed change is better implemented. This is the approach taken in the paper, which seeks to explore resistance among academic staff to the adoption of technology affordances in Higher Education teaching and learning. The initial hypothesis based on survey research suggests that there will always be faculty who eschew information and communication technologies (ICTs) – beyond basic PowerPoint™ and email - and thus will be unable to take advantage of learner engagement through the pedagogical affordances both of virtual learning environments (VLEs) and of Web 2.0. Institutions increasingly require staff to adopt basic engagement with VLEs, but that is as far it goes with many teachers. Rather than just have to put up with this situation, or make people participate despite their personal views, we should seek to understand better what causes such resistance, what underlying personal pedagogies are driving this perspective, and how best to accommodate strongly held personal pedagogic diversity amongst teaching staff. As part of a larger project to explore and map academic staff stances in relation to e-learning and e-teaching, the preliminary research discussed in the paper analyses initial qualitative unstructured interviews with staff, selected for their reluctance to explore the possible learning and teaching affordances of ICTs. Results from the initial study have been analysed in relation to current thinking on change management discussions of resistance (Waddell and Sohal, 1998, Ford et al., 2008), in order to offer some tentative recommendations on how the phenomenon may be further studied and how institutions wishing to develop staff adoption of ICTs in learning and teaching may proceed”(Greener, 2010).

Conclusions

1. Currently wide-ranging discussion of the wide-spread use of technology in the study process takes place in the world. Technology in a people-centred way and in terms of division of labour, specialisation, economies of scale and machines is used in all areas of life. Technology principles have been used to increase access, improve quality and lower costs in e-learning as well.
2. Before implementation of the new training system at the university, the existing organization`s functionality, finance resources, human resources, their potential, regarded as significant pedagogical preconditions of the successful study environment, have to be examined. That will provide sound basis for acquisition of new studying habits using new study technology.
3. The ability to deliver personalised learning or student centric learning is paramount and to provide platforms of tools that enable non-professionals to create software that helps different types of learners at the university study process is important. These tutor tools are likely to emerge as some form of personalized virtual tutoring as well.
4. Instructors/Teachers contribute to content development and catering for all types and styles of learner and their skills development; it is believable and likely not only acceleration of the virtual schools, but virtual study environment as well.
5. Resistance, as psychological aspect in education, is something to be explored and understood in students, instructors and administration as well, in order that communication and understanding about the proposed change is better implemented. To explore resistance among academic staff to the adoption of technology affordances in Higher Education teaching and learning is significant, too.

References

1. Analysis of emerging trends affecting the use of technology in education. Research to support the delivery and development of Harnessing Technology: Next Generation Learning 20082014. BECTA collection (2008); http://www.elearningcentre.co.uk/Resources/Becta_Collection 12.07. 2011.
2. Bonk J. C. (2009) The World Is Open: How Web Technology is Revolutionizing Education. Indiana University. US. Higher Education, August 25, 2009. http://online-journals.org/i-jet/article/view/1443. 18.07.2011.
3. Christensen M. C. (2008) Disrupting Class. How Disruptive Innovation will Changethe Waythe World Learns. BECTA collection (2008) http://www.elearningcentre.co.uk/Resources/Becta_Collection 18.07.2011.
4. Daniel S. J. (2009). Is E-Learning True to the Principles of Technology?. Presented at World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2009.**World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education (ELEARN) 2009** October 26, 2009. http://www.editlib.org/view/33043,17.07.11.
5. Harfoushi O., Obiedat R. (2011) E-Training Acceptance Factors in Business Organizations. International Journal of Emerging Technologies in Learning (iJET), Vol 6, No 2 (2011) ISSN: 1863-0383 http://online-journals.org/i-jet/article/view/1443. 18.07.2011.

6. Greener S. (2010) Staff who say no to Technology Enhanced Learning. Proceedings of the 5th International Conference on e-Learning. Universiti Sains Malaysia. Penang. Malaysia. 12-13 July 2010 http://academicconferences.org/2-proceedings.htm.ISBN: 978-190663869-6 (cd) Published by Academic Publishing Limited . Reading. UK.44-118-972-4148. www.academic-publishing.org.19.07.2011.
7. Shivetts C. (2011). E-Learning and Blended Learning: The Importance of the Learner. A Research Literature Review. International Journal on E-Learning, 10(3), 331-337. Chesapeake, VA: Association for the Advancement of Computing in Education (AACE). **International Journal on E-Learning.** ISSN 1537-2456 Volume 10, Issue 3, July 2011Chesapeake, VA. http://www.editlib.org/p/33111,17.07.2011.

FOREIGN LANGUAGE AS A MEANS OF COMMUNICATIVE COMPETENCE

Olga Civzele, Mg.paed, Mg.proj.mgmt.,
Latvia University of Agriculture, 2, Liela St., Jelgava, Latvia,
olga.civzele@inbox.lv
Larissa Turusheva, Dr.paed.,
Latvia University of Agriculture, 2, Liela St., Jelgava, Latvia,
larisa.turuseva@llu.lv

Abstract. Learning a foreign language is not the aim for students of the bachelor's study programme *External Relations of Organisations*. English as a foreign language is integrated into the study process and has become a tool in acquiring professional competence. ESL standards, worked out at the Center of Applied Linguistics in Washington, DC, have been taken as a basis in achieving learning outcomes. Blended learning, which includes both traditional and non-traditional methods and means of learning a foreign language, has proved to be successful in reaching the main goals: business and life communication, work with different sources of information and its presentation, cross-cultural communication.
Key words: communicative competence, procedural language knowledge, foreign language as a tool, CAL ESL standards, blended learning

Methods of the research

1. Theoretical: analysis of scientific literature on philosophy, psychology, education and international experience;
2. Empirical: quaziexperiment, which includes:

participants pedagogical observation (monitoring); discussions; interviews with employers and graduates of the study programme – an opportunity to do a needs analysis; focus group discussions; reflection within the framework of portfolio method on the students' competence assessment; students' and their practice supervisors' questioning; Mann-Whitney U test; Cramer V coefficient.

Research base

All the students of the Latvia University of Agriculture 2nd level professional study programme *External Relations of Organisations* during the whole study period (96 students in 2005 and 72 students in 2009) and 88 their practice supervisors, 63 respondents – employers and 6 study programme graduates – young specialists.

Communicative Competence of the Head of External Relations Unit

The concept of communicative competence has a wide range of interpretation, therefore for the purpose of external relations needs an analysis of communicative competence concept in the

comprehension of linguists (Canale, Swain, 1980; Surigin, 2000; Kostomarov, 1999; Kunin, 1996 and others) and sociologists (Vaclavik, Bibin, 2000; Ezera, Graudina, Dreiberga, 2000; Edeirs, 1999 and others) has been done.

Linguists pay attention to language and speech aspects, as shown in Figure 1.

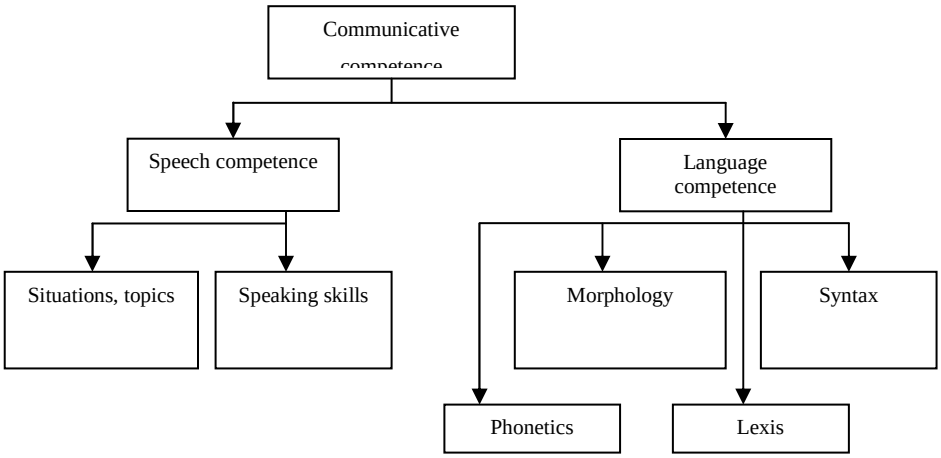


Figure 1. Communicative competence in the understanding of linguists (Surigin, 2000:69).

In the current research *the communicative competence of the head of external relations* is understood as one of five competencies which create professional competence. *Communicative competence* is one of the main managerial professional competence components (Boyatzis, 1982; Wood and Payne, 1998; Tuning Educational Structures…, 2002; Burganova, 2008 and others), as all the management functions are tightly connected with communication.

Because of the necessity to establish and maintain contacts, create and maintain partnership relations, to present the organization, which are the main external relations functions, a *language acquisition skill* becomes one of the *life-long learning skills* and an important component of *the head of external relations unit's communicative competence.* The use of foreign languages is a link and tool for successful and resultful study subjects' acquisition, development of different competences. Limited foreign languages skills impose restrictions in the work of business people; prevent Latvia from getting involved into international projects and activities, in the result of which the European and world markets have partly been missed out.

Expertinterview results show that all experts name communicative competence as the main competence of the head of external relations unit, with the help of which all the other manager's competences are synthesised and realised. As the most important reasons of non-successful communication Latvian employers name a language barrier and lack of information, business culture and etiquette.

However, the knowledge of foreign languages is not a guarantee for a high level of communicative competence, as *communicative competence* consists not only of *communication skills* (speaking, listening, reading, writing, non-verbal and foreign languages skills*),* but also *the skills to accept and present information* (ICT use, presenting (oral and written) skills, performing*),* which supplement informative competence, and vice versa.

The curriculum of the *External Relations of Organizations* study programme includes such study subjects as *Countries studies*, *Business communication*, *Business correspondence* (all together 15 subjects are taught in English), *Speech and writing culture*, *Business etiquette and communication* and others, in the study process of which the necessary communicative skills are developed.

Languages at the Study Programme *External Relations of Organisations*

The English language is widely used in 16 EU countries. According to Eurostat data, almost half of adult citizens in these countries (47 %) speak English. In comparison, only 34% of Latvia respondents can communicate in English (Svesvalodu izmantosana ES valstis un Latvija, 2005).

The results of both, expertinterviews and interviews with the graduates of the study programme *External Relations of Organisations*, show that language competency is one of the most important external relations specialist's competencies. In the process of language acquisition students develop their professional competence, as they develop all communication aspects: interpersonal, interpretive and presentational.

Not only methodological, but psychological factor as well influence the process of language learning with different groups of students. Generally speaking, nowadays people understand the necessity of knowing a foreign language. Nevertheless, the level of students' knowledge of English varies a lot.

According to the data of Latvia Ministry of Education and Science, "quite a big proportion of young people finish school with low, or very low key skills, especially in natural sciences and foreign languages. Eurostat data prove that Latvia has one of the lowest results in EU" (IZM, 2008:1).

English as a subject is not included in the curriculum of the study programme *External Relations of Organisations* at Latvia University of Agriculture, but it is widely used as a tool in the acquisition of the study programme. Because of the situation that the students' level of knowledge of English is different, *English Grammar* is a compulsory subject for the first two semesters.

Getting prepared for the seminars, students have to read a lot in English in practically all the subjects of the curriculum. K.Cho and S.Krashen in the USA (Cho and Krashen, 1994), F.Hafiz and I.Tudor in UK (Hafiz and Tudor, 1989), F.Lai in Hong Kong (Lai, 1993), as well as current research results prove that reading in a foreign language improves listening and speaking skills, in the result of which communicative competence is developed. In the study programme *External Relations of Organisations* languages are used as a means for the development of professional competence, and languages, especially the English language, acquisition is integrated into the study programme and shows the level of professional competence of external relations specialists.

Because of a comparatively very short period of time available for the third foreign language acquisition, searching for the best foreign language teaching style, different methods are used. Each approach is based on different concepts of languages learning and aids, the use of specific techniques. German for Specific Purposes, which is an obligatory subject, has 9 ECTS credits; but basics of French, Italian, Russian and Spanish are optional courses for 3 to 9 ECTS credits each. The question is if a student can choose a third language to learn, and if s/he chooses it, what level of language skills s/he will have. The question arises, as in total the curriculum allows not more than 9 ECTS credits in total for all optional courses.

There is not a single perfect method of language teaching, good for everyone. For the purposes of the study programme *External Relations of Organisations,* an integrated study system, the so-called *blended learning*, which combines different methods, is used. Students and teachers, both think that the system is contributory and motivating. ICT use helps the students acquire a foreign language at their own pace, independently from their groupmates. The results of this system usage are seen in the students' self-evaluation and in the employers' evaluation of the students' skills.

ESL standards (ESL, 2002), worked out at the Center of Applied Linguistics in Washington, DC have been used as most compatible with the Professional Standard for the head of external relations unit (Profesijas standarts, 2003). Thus, English is not taught as a study subject, it is a means for other subjects' content acquisition.

Table 1.

ESL Standards (ESL, 2002) in Comparison with the Head of External Relations' Professional Competence Criteria

Goals of ESL use	ESL Standards (ESL, 2002)	Fields of ESL use by students	ESL Standards eligibility to professional competence criteria
Goal 1: *To use English to communicate in social settings*, which corresponds with communicative and collaborative competences.	Standard 1	Social interactions	Collaboration competence
	Standard 2	Interaction in, through, and with spoken and written English for personal expression and enjoyment	Collaboration and communicative competences
	Standard 3	Use of learning strategies to extend communicative competence	Communicative, informative and learning competences
Goal 2: *To use English to achieve academically in all content areas*, which corresponds with learning competence, skills to put knowledge into practice and communicative competences.	Standard 1	Interaction in the classroom	Collaboration competence
	Standard 2	Obtaining, processing, constructing, and providing subject matter information in spoken and written form	Requirements coincide with informative competence life-long learning skills
	Standard 3	Use of appropriate learning strategies to construct and apply academic knowledge	Learning and self-management competences, which include self-assessment, self-reflection, self-confidence and self-discipline
Goal 3: *To use English in socially and culturally appropriate ways*. In Professional Standards these are collaboration and communicative competences.	Standard 1	Use of appropriate language variety, register, and genre according to audience, purpose, and setting	Collaboration and communicative competences
	Standard 2	Use of nonverbal communication appropriate to audience, purpose, and setting	Collaboration and communicative competences
	Standard 3	Use of appropriate learning strategies to extend sociolinguistic and sociocultural competence	Collaboration and communicative competences

In the table (Table 1) ESL standards are compared with professional competence criteria of the head of external relations. The table is worked out on the basis of ESL standards (ESL, 2002) and Professional Standard for the head of external relations unit (Profesijas standarts, 2003).

Conformity to the study programme objectives is seen in the standards for foreign language learning by the American Council on the Teaching of Foreign Languages (Standards..., 1996):

STANDARDS FOR FOREIGN LANGUAGE LEARNING

COMMUNICATION: Communicate in Languages Other Than English

- *Standard 1.1:* Students engage in conversations, provide and obtain information, express feelings and emotions, and exchange opinions.
- *Standard 1.2:* Students understand and interpret written and spoken language on a variety of topics.
- *Standard 1.3:* Students present information, concepts, and ideas to an audience of listeners or readers on a variety of topics.

CULTURES: Gain Knowledge and Understanding of Other Cultures

- *Standard 2.1:* Students demonstrate an understanding of the relationship between the practices and perspectives of the culture studied.
- *Standard 2.2:* Students demonstrate an understanding of the relationship between the products and perspectives of the culture studied.

CONNECTIONS: Connect with Other Disciplines and Acquire Information

- *Standard 3.1:* Students reinforce and further their knowledge of other disciplines through the foreign language.
- *Standard 3.2:* Students acquire information and recognize the distinctive viewpoints that are only available through the foreign language and its cultures.

COMPARISONS: Develop Insight into the Nature of Language and Culture

- *Standard 4.1:* Students demonstrate understanding of the nature of language through comparisons of the language studied and their own.
- *Standard 4.2:* Students demonstrate understanding of the concept of culture through comparisons of the cultures studied and their own.

COMMUNITIES: Participate in Multilingual Communities at Home & Around the World

- *Standard 5.1:* Students use the language both within and beyond the school setting.
- *Standard 5.2:* Students show evidence of becoming life-long learners by using the language for personal enjoyment and enrichment (Standards..., 1996).

To find out the students' communicative competence level a questionnaire was given to the students and their practice supervisors, which consisted of the same questions. The questionnaires were fulfilled by the same students in 2007 and 2009 at the end of practice period in the 2nd and 4th study years after the criteria for each indicator (competency). All together 137 students' and 89 practice supervisors' questionnaires were analysed.

Table 2.

Structure and Criteria of the Head of External Relations Unit's Communicative Competence

Competence	*Criteria*	*Grades*				
COMMUNICATIVE COMPETENCE	Criterion *Communication skills*					
	1. Indicator *Speaking*	1	2	3	4	5
	2. Indicator *Listening*	1	2	3	4	5
	3. Indicator *Reading*	1	2	3	4	5
	4. Indicator *Writing*	1	2	3	4	5
	5. Indicator *Non-verbal*	1	2	3	4	5
	6. Indicator *Foreign languages skills*	1	2	3	4	5
	Criterion *Skills to accept and present information*					
	1. Indicator *ICT use*	1	2	3	4	5
	2. Indicator *Presenting (oral and written) skills*	1	2	3	4	5
	3. Indicator *Performing*	1	2	3	4	5

The grades description is generalized, it is concretised by indicators.

Research Results

Data validity and reliability are guaranteed by mixed research methods use, which is a necessary condition to get generalised information on the research field. The research is done to evaluate the students' competence development during the whole study period and the results validity and reliability are maintained by the employers' – practice supervisors' participation in the research.

To check the qualitative data, non – parametric data processing methods of SPSS Statistics 17.0 software were used. As the questionnaires results reflect subjective evaluation and are non – parametric, Mann-Whitney U test for 2 independent samples was used (Paura, Arhipova, 2002), with the help of which interval, relations and ordinal scale data were processed.

The reliability of the data is proved with the calculated p-value (Sig.) in statistical tests and 95% - 100% max.value level (0,05>V>0,000), Mann-Whitney U test for 2 independent samples and Cramer's V coefficient.

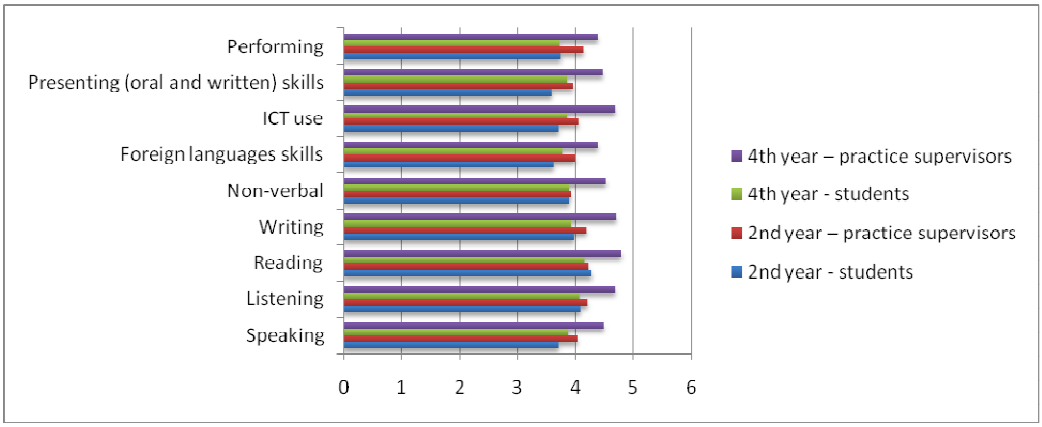


Figure 2. Assessment of the Same Students' Communicative Competence Skills in the 2nd and 4th Years of Studies (in 5 grades).

The comparison of the students' skills assessment results in the 2nd and 4th years of studies show that whether the students are too critical to themselves or the results of their studying are not good enough. However, their self-evaluation results are in conflict with employers – practice supervisors' opinion about the students' skills, the research data, interviews and observation results. In the result of that the students' and employers' assessment coherence was researched to check the students' accuracy of self-evaluation.

The empirical research results allow concluding that:

- with 100% max.value (V=0,000) the evaluation of practice supervisors is disparately higher in comparison with the students' evaluation of the indicators „reading", „writing", „information and communication technologies use";
- practically with 100% max.value (0,05>V>0,001) the evaluation of practice supervisors is disparately higher than that of the students for the indicators „non-verbal skills", „foreign languages", „presenting skills", „performing", „teamwork" and „managing people and resources".

Conclusions

1. Language is a tool for the head of external relations unit's professional competence development, which contributes to communicative, informative and learning competences development;

2. Taking part in annual students' conferences and international conferences helps students develop their presentation skills, as presenting in a foreign language in an unknown environment is a challenge, which helps to collaborate better in the future.

References

1. Boyatzis, R. (1982). *The Competent Manager: A model for effective performance.* New York: John Wiley and Sons.
2. Burganova, L.A. (2008). *Teorija upravlenija.* (Vissheje obrazovanije). M. ZHINFRA-M. [in Russian].
3. Canale, M. & Swain, M. (1980). Theoretical bases of communicative approaches to second language teaching and testing, *Applied Linguistics,* 1, 1–47.
4. Cho, K.S. & Krashen, S.D. (1994). Acquisition of Vocabulary from the Sweet Valley Kids series: Adult ESL acquisition, *Journal of Reading*, 3798, 662–667.
5. Edeirs, Dz. (1999). *Efektiva komunikacija: Vissvarigaka vadibas makslas metode*. R.: Asja. [in Latvian].
6. *ESL Standards for Pre-K—12 Students Project*. (2002). Retrieved March 17, 2003, from http://www.cal.org/eslstandards/.
7. Ezera, I., Graudina, I., Dreiberga, S. (2000). *Lietiska komunikacija*. Riga: Kamene. [in Latvian].
8. *IZM Noteikumi*. (2008). Retrieved May 3, 2008, from http://www.aiknc.lv [in Latvian].
9. Hafiz, F.M. & Tudor, I. (1989). Extensive reading and the development of language skills, *ELT Journal*, 43(1), 4–13.
10. Kostomarov, V.G. (1999). *Yazikovoj vkus epohi. Iz nabljudenij nad rechevoj praktikoj mass-media.* SPb: Zlatoust. [in Russian].
11. Lai, F.-K. (1993). Effect of extensive reading on English learning in Hong Kong, *CUHK Education Journal*, 21(1), 23-36.
12. Paura, L. & Arhipova, I. (2002). *Neparametriskas metodes. SPSS datorprogramma*. Jelgava: LKC. [in Latvian].
13. *Profesijas standarts*. (2003). Registracijas numurs PS 0229. Profesija. Arejo sakaru strukturvienibas vaditajs. Kvalifikacijas limenis. Retrieved March 9, 2007, from http://www.izmpic.gov.lv/Standartu_reg/Arejo_sakaru_str_vien_vaditajs.pdf [in Latvian].
14. *Standards for Foreign Language Learning: Preparing for the 21st Century*. (1996). ACTFL. Retrieved March 9, 2007, from http://www.actfl.org/i4a/pages/index.cfm?pageid=3392.
15. Surigin, A.I. (2000). *Osnovi teorii obucheniya na nerodnom dlya uchashihsya yazike*. SPb: Zlatoust [in Russian].
16. *Svesvalodu izmantosana ES valstis un Latvija. Eiropas Komisijas petijums.* (2005). TNS Latvia. Retrieved October 8, 2008, from http://www.tns.lv/?lang=lv&fullarticle=true&category showuid&id=2296&mark=sve%F0valodu|zin%E2%F0anas [in Latvian].
17. *uning Educational Structures in Europe; Line 1: Learning Outcomes: Competences.* (2002). Retrieved February 25, 2006, from http://tuning.unideusto.org/tuningeu.
18. Turusheva, L. (2010). *Professional Competence of the Head of External Relations Unit and Its Development in the Study Process. Summary of the Doctoral Thesis for the scientific degree of Dr.paed. in Higher School Pedagogy*. Riga.
19. Vaclavik, P. & Bibin, D. (2000). *Psihologija mezhlichnostnih kommunikacij*. *Sankt-Peterburg:* OTTO press. [in Russian].
20. Wood, R. & Payne, T. (1998). *Competency-based recruitment and selection*. Wiley.

MĀCĪBU PRIEKŠMETA „SOCIĀLĀS ZINĪBAS” SASNIEDZAMIE REZULTĀTI VECĀKU SKATĪJUMĀ

ACHIEVABLE OUTCOMES OF „SOCIAL SCIENCES” FROM THE PARENTS' POINT OF VIEW

Lana Janmere, Mg.sc.soc.,
Latvijas Lauksaimniecības universitātes Sociālo zinātņu fakultāte, Lielā iela 2, Jelgava,
lana.janmere@llu.lv, 26451002

Abstract. Parental involvement in the development and assessment of educational content is a rare research subject not only in pedagogy, but in Latvian social science research as well. There is not serious analysis in the scientific literature about subject content from the parent's point of view and it isn't used in the development of educational content. These are the main reasons which determine the necessity of such research. Furthermore „Social sciences" is new subject in the Latvia educational system and there are different attitudes about it from teachers and pupils. As far as results from this research show parents generally accept content of this subject, but they disagree about some themes, which are included in the content of „Social sciences". Therefore developers of educational content must take in to consideration parent's point of view about knowledge and skills which are achievable outcomes in this subject.
Key-words: parents, social sciences, knowledge, skills.

Ievads

Mācību priekšmets „Sociālās zinības” ir salīdzinoši jauns mācību priekšmets Latvijas izglītības sistēmā, kas ieviests pirms 5 gadiem. Kā minēts šī priekšmeta paraugprogrammā, tā nepieciešamību noteikušas mūsdienu pasaulei raksturīgās straujās pārmaiņas, kas ietekmē gan cilvēku ikdienas dzīvi profesionālajā un personīgajā jomā, gan valstu un sabiedrību iekšējās un savstarpējās attiecības. Tādēļ sabiedrībai jāveidojas no kritiski domājošiem un sociāli atbildīgiem indivīdiem, kuri spēj un vēlas uzklausīt dažādus viedokļus, prot un grib risināt gan viņiem pašiem, gan sabiedrībai un valstij kopumā nozīmīgus jautājumus, veiksmīgi orientējas mainīgajā ekonomiskajā situācijā (Sociālās zinības 1. – 9. Klasei. Pamatizglītības mācību priekšmeta programmas paraugs.). Līdz ar to mācību priekšmeta „Sociālās zinības” mērķis ir sekmēt sociālo procesu izpratni, kā arī izglītojamā gatavību pieņemt un īstenot sociāli atbildīgus lēmumus personiskajā, profesionālajā un sabiedriskajā dzīvē demokrātiskā sabiedrībā (Sociālās zinības. Mācību priekšmeta standarts 1. – 9. klasei, 2006). Būtiski atzīmēt, ka sociālo zinību apguve sniedz ieguldījumu dažādu līmeņu attīstībā, ne tikai aptverot skolēna personīgo izaugsmi, bet arī atklājot viņa vietu sabiedrības un valsts kontekstā.

Sociālās zinības ir integrēts dažādu zinātņu jomu priekšmets un apvieno sevī iepriekš atsevišķi mācītus priekšmetus: veselības mācību, biznesa ekonomiku, ētiku un civilzinības. Tādējādi pašlaik šajā mācību priekšmetā apvienotas četru izglītības jomu – veselības, ētikas, ekonomikas, pilsoniskās – zināšanas. Šāda pieeja ļauj veiksmīgi atklāt kopsakarības un izprast

sabiedrību un cilvēkus no dažādiem skatu punktiem, kā arī attīstīt skolēnos sistēmisko domāšanu. G. Avotiņa u.c. autori to definē kā sociālo domāšanu, ko raksturo spējas aplūkot objektu vai tēmu no daudzu dimensiju redzes leņķiem, proti, paskatīties uz parādību filozofiski, ekonomiski, valstiski vai politiski, no cilvēka veselības un tikumisko vērtību viedokļa (Avotiņa u.c., 2003).

Sociālo zinību saturu veido trīs komponentes:

- Gatavība sociāli atbildīgai nostājai;
- Sociālpolitisko un ekonomisko norišu un personības attīstības pētīšana un interpretēšana;
- Izpratne par cilvēka un sabiedrības attīstības likumsakarībām (Sociālās zinības. Mācību priekšmeta standarts 1. – 9. klasei, 2006).

Sociālās atbildības veidošana skolēnos ir šī mācību priekšmeta vadmotīvs, ko iespējams realizēt, attīstot sistēmas pieeju jebkuras personības un sabiedrības problēmas vai parādības analīzē. Ja skolēns gūs izpratni par to, kā viņa rīcība, kas ir viens neliels sabiedrības sistēmas elements, var ietekmēt apkārtējos un sabiedrību kopumā un kā atbildes reakcija var ietekmēt viņu pašu, sociālās atbildības jēdziens gūs daudz praktiskāku nozīmi šī skolēna apziņā. Būtībā sociālā atbildība būtu jāsaprot ne tikai kā atbildība pret citiem, bet arī sevi pašu.

Balstoties uz skolēna ieguvumiem no katras sociālajās zinības iekļautās izglītības jomas, varētu izveidot interesantu skolēna ideālu: veselīgs un veselību veicinošs, tolerants, saimniecisks, labs savas valsts pilsonis. Tādu rezultātu vēlas sasniegt izglītības politikas veidotāji – profesionāļi, taču vai tādus savus bērnus vēlas redzēt vecāki? Tas ir jautājums, uz kuru tiks meklēta atbilde pētījumā.

Pētījuma metodes

Lai atklātu, kādi ir vecāku viedokļi par sociālajām zinībām un to uzdevumiem, un apkopotu viņu priekšlikumus šī mācību priekšmeta satura uzlabošanā, tika veikts kvantitatīvs pilotpētījums, kurā nepieciešamo datu ieguvei tika izmantota aptaujas metode. Tādējādi bija iespēja pārbaudīt izveidoto pētījuma instrumentāriju, kas ļautu tālākajos pētījumos iegūt kvantitatīvu minētās pētījuma problēmas raksturojumu un atklāt tās galvenās attīstības tendences.

Pētniecības instruments – anketa tika sastādīta, izmantojot mācību priekšmeta „Sociālās zinības" standartā 1. – 9. klasei iekļauto saturu. Anketa izveidota ar mērķi noskaidrot, kādi ir vecāku viedokļi par sociālo zinību sasniedzamajiem rezultātiem, kas minēti priekšmeta standartā,

un vai tie, viņuprāt, ir nepieciešami šī mācību priekšmeta ietvaros. Anketas struktūru veido 3 tematiskie virzieni:

1. sociālo zinību standarta uzdevumos paredzēto zināšanu nepieciešamība skolēniem vecāku vērtējumā;
2. sociālo zinību standarta uzdevumos paredzēto prasmju nepieciešamība skolēniem vecāku vērtējumā;
3. vecāku viedokļi par sociālajās zinībās iekļauto veselības, ētikas, ekonomikas un pilsoniskās izglītības jomu nepieciešamo īpatsvaru.

Anketas datu analīzē tika izmantoti absolūtie un relatīvie rādītāji. Tā kā anketā iekļauto jautājumu loks ir plašs, dažādu atbilžu salīdzināšanai tika aprēķināti kopējie indeksi. Šādu indeksu kā vispārinošu statistisku rādītāju izmantošana dos iespēju analītiskās izteiksmēs aizstāt individuālas pazīmes vērtības ar vienu kopējo (Kristapsone, 2008).

Pētījumā 2010. gada novembrī un decembrī piedalījās 239 respondenti, kas dzīvo Rīgā (70 respondenti), Jelgavā (94 respondenti) un lauku teritorijās (bijušie Jelgavas un Dobeles rajoni) (75 respondenti), tādējādi tika dota iespēja savu viedokli paust dažādiem respondentiem. Sākotnēji tika plānots rezultātu analīzi veidot, izmantojot kritēriju „dzīvesvieta", taču pašlaik nelielā izlases apjoma dēļ tas vēl nav iespējams. Tā kā ir iecere pētījuma instrumentāriju izmantot plašāk, šis uzdevums tiks izpildīts. Šajā rakstā tiks atainoti daži galvenie rezultāti, kas atklājās, analizējot pilotpētījumā iegūtos datus.

Rezultāti un diskusija

Vecāku loma izglītības politikas veidošanā tiek vērtēta pretrunīgi. No vienas puses tiek kritizēti izglītības satura ietekmēšanas instrumenti, kādi ir vecāku rīcībā, bet no otras puses tiek uzsvērts vecāku zināšanu trūkums un neieinteresētība ne tikai izglītības satura noteikšanā, bet arī sadarbībā ar skolu un skolotājiem. Mācību priekšmetā „Sociālās zinības" vecāku sadarbība ar skolu ir īpaši svarīga, jo tā mērķi un uzdevumi ir cieši saistīti arī ar audzināšanas uzdevumiem ģimenē.

Zināšanu ieguve ir viens no metodiskajiem mērķiem sociālajās zinībās. Par būtiskākajām zināšanām, ko bērni iegūst sociālajās zinībās, vecāki uzskata veselības izglītības jautājumus. Samērā lielā vienprātībā viņi atzīst, ka nepieciešama izpratne par veselīgu dzīvesveidu un veselībai labvēlīgu vidi, savu un citu atbildību pret veselību un veselīgu vidi. Tam pilnībā piekrituši un piekrituši attiecīgi 118 jeb 49% un 98 jeb 41% respondenti. Tādējādi šīs zināšanu grupas kopējais indekss ir 1,38, kas ir augstākais rādītājs salīdzinājumā ar pārējām vecāku novērtētajām sociālajās zinībās iegūstamajām zināšanām.

Zināšanas par sabiedrības ētiskajām vērtībām tiek vērtētas kā otra nozīmīgākā zināšanu grupa. Tādējādi ētiskos jautājumus vecāki atzīst par būtisku sociālo zinību sastāvdaļu. Šo zināšanu iekļaušanai sociālajās zinībās pilnībā piekrīt vai piekrīt kopā 212 jeb 88% respondentu, kas veido augstu kopējo indeksu 1,3. Arī vērtējot šo zināšanu grupu, salīdzinoši neliels ir to respondentu skaits (22 jeb 9%), kas nav spējuši paust konkrētu viedokli. Būtībā izpratni par ētiskajām vērtībām vecāki uzskata par būtisku sava bērna izglītības elementu. Tas varētu būt skaidrojams ar to, ka viņi vēlas, lai skola turpinātu ģimenē mācīto vai arī tieši pretēji – lai skolā bērns iegūst to, ko ģimenē dažādu iemeslu dēļ nav iemācījies.

Kā trešā nozīmīgākā zināšanu grupa novērtēta „izpratne par satiksmes drošību un citu drošības noteikumu ievērošanu". Indeksa vērtība 1,29 ir diezgan tuva pirmajai un otrajai zināšanu grupai, kas liecina par to, ka drošības jautājumu nozīme vecāku skatījumā nav mazāk būtiska kā veselība un veselīga vide, kā arī sabiedrības ētiskās vērtības. Šāds vērtējums varētu būt saistīts ar publiskajā telpā bieži izskanējušo informāciju, ka cilvēki un it īpaši bērni dažādās sadzīves situācijās gūst nopietnas traumas, un zināšanu ieguve par drošības noteikumiem un darbībām, kā nelaimes gadījumos rīkoties, bērniem palīdzētu izvairīties no dzīvību apdraudošām situācijām.

Taču kā mazāk nepieciešamas vecāki vērtē pilsoniskās un ekonomikas izglītības sniegtās zināšanas. Izpratnei par sabiedrības sociālajiem un politiskajiem procesiem un likumsakarībām kā nepieciešamām zināšanām pilnībā piekrīt vai piekrīt attiecīgi 31 jeb 13% un 123 jeb 51% respondentu. Tādējādi salīdzinoši zemāks ir šīs zināšanu grupas indekss, kas nepārsniedz vērtību 1 un ir tikai 0,67. Liels skaits ir to vecāku (66 jeb 28%), kas nespēj paust konkrētu viedokli par šo jautājumu. Skaidrojumi tam var būt dažādi: vai nu viņi par to nav vispār domājuši, vai arī nespēj izlemt, vai šādas zināšanas viņu bērniem ir nepieciešamas. Bet izpratne par sabiedrības ekonomiskās attīstības likumsakarībām ir zināšanas, kas tiek vērtētas vēl zemāk nekā iepriekš minētie sociālpolitiskie jautājumi. To par nepieciešamu uzskata kopumā 129 respondenti, kas ir tikai nedaudz vairāk kā puse (54%) aptaujāto. Turklāt vērtējot šo zināšanu grupu ir vislielākais respondentu skaits, kas nespēj izvēlēties konkrētu alternatīvu. Tie ir 86 jeb 36% aptaujāto, kas ir vairāk kā trešdaļa no visiem respondentiem. Līdz ar to kopējais indekss ir tikai 0,5.

Būtībā kā nozīmīgas tiek vērtētas tās zināšanas, kas nav saistītas ar sabiedrisko procesu izpratni, bet gan skar konkrētus cilvēkus individuāli – veselība, ētiskās vērtības, drošība. Varētu teikt, ka vecākiem pašiem trūkst sociālās domāšanas, kuru attīstīšanu paredz mācību priekšmets „Sociālās zinības". Viņi neskata pasauli kā sistēmu, kurā gan individuālās, gan kolektīvās aktivitātes ir savstarpēji saistītas un atzīmē kā būtiskāko tieši individuālo dzīves jomu. To gan nevar

apgalvot par visiem aptaujātajiem, taču, kā liecina aptaujas rezultāti, tāda ir lielākā daļa respondentu.

Sociālo zinību standartā 1. – 9. klasei ir paredzēts, ka skolēniem jāgūst zināšanas arī par sabiedrībā visai pretrunīgi vērtētiem jautājumiem. Vecāku viedokļi par to, vai bērniem skolā būtu jāgūst informācija par sociālajām problēmām un citiem pretrunīgi vērtētiem procesiem ir visai dažādi. Kā liecina iegūtie dati, atbilžu izkliede ir diezgan liela un, izvērtējot šos jautājumus, respondenti vairs nepauž tādu vienprātību kā iepriekš apskatītajos.

Lielākā daļa vecāku, t.i., vairāk nekā 85% aptaujāto pilnībā piekrīt vai piekrīt, ka bērniem sociālo zinību stundās ir jāgūst informācija par visādiem atkarību veidiem un to negatīvajām sekām. Izvērtējot tādas atkarības – smēķēšana, alkoholisms, narkomānija, azartspēļu atkarība un datoratkarība -, kas kļuvušas arī par sociālām problēmām, vecāku viedokļi ir visai vienprātīgi un to respondentu skaits, kas uzskata, ka sociālo zinību stundās par to nevajadzētu runāt ir salīdzinoši neliels – ap 10 respondentu. Datoratkarībai kopējais indekss ir vislielākais – 1,4, taču gandrīz tikpat liela indeksa vērtība 1,39 ir narkomānijai un arī smēķēšanai un alkoholismam – katrai pa 1, 38. Nedaudz vairāk vecāku nespēj paust konkrētu viedokli attiecībā uz azartspēļu atkarības problēmu iekļaušanu sociālo zinību saturā, tādēļ azartspēļu atkarības kopējais indekss ir mazāks 1,32. Būtībā šie rādītāji liecina par to, ka vecāki līdzīgi kā skolotāji un citu jomu profesionāļi uzskata, ka viens no galvenajiem preventīvajiem pasākumiem, lai izvairītos no atkarības, ir informēšana par tās izpausmēm un iespējamajām sekām. Tādējādi sociālo zinību stundās sniegtās zināšanas tiek skatītas kā efektīvs sociālo problēmu prevences instruments. Vecākiem ir svarīgi, ka ne tikai viņi veic izglītojošu darbu, bet to arī dara skola – konkrēti šajā gadījumā sociālo zinību skolotājs, kam šāds pienākums tiek deleģēts.

Līdzīgi kā atkarību problēmas arī vardarbības jautājumi tiek vērtēti kā nepieciešami sociālo zinību stundās. 205 jeb 86% aptaujāto pilnībā piekrīt vai piekrīt, ka par vardarbību un tās veidiem ir jārunā sociālo zinību stundās. Viens no respondentiem, kas atzīmēja, ka par vardarbību skolēniem ir jābūt informētiem, uzdeva jautājumu, vai tiešām būtu jārunā detalizēti par vardarbības veidiem. Būtībā tiek piekrists tam, ka vardarbības jautājumi ir svarīgi sociālo zinību stundās, taču vismaz mazākajās klasēs nevajadzētu tos īpaši smalki iztirzāt.

Salīdzinoši mazāk vecāku piekrīt tam, ka bērniem sociālo zinību stundās būtu jāgūst informācija par seksuālo dzīvi, tās uzsākšanu, slimībām un novirzēm. 159 jeb 66% aptaujāto uzskata, ka bērniem ir jāstāsta par dzimumdzīves uzsākšanu un kontracepcijas lietošanu. Turpretim 34% aptaujāto nav konkrēta viedokļa par šo jautājumu vai arī tam nepiekrīt. Līdz ar to kopējais indekss ir 0,74, kas ir daudz zemāks nekā vērtējot atkarības un vardarbības jautājumus, taču ir

lielākais, kas saistīts ar seksuālajiem jautājumiem. Izvērtējot sociālo zinību stundās iekļaujamo informāciju par abortu, seksa industriju, seksuāli transmisīvajām slimībām, kopējais indekss atrodas robežās no 0,46 līdz 0,51. Tātad respondenti, kas atbalsta bērnu izglītošanu par šiem jautājumiem, ir mazliet vairāk nekā puse ap 55% no visiem aptaujātajiem.

Vismazāk vecāki piekrīt tam, ka sociālo zinību stundās tiek runāts par klonēšanu un eitanāziju, lai gan tie ir nozīmīgi veselības izglītības jautājumi. Klonēšanas tematikas iekļaušanai sociālajās zinībās pilnībā piekrīt vai piekrīt 34% aptaujāto, bet eitanāzijai – 36% aptaujāto. Interesants ir fakts, ka lielākā daļa no pārējiem respondentiem nevis nepiekrīt šo jautājumu iekļaušanai sociālo zinību stundās, bet gan nespēj paust konkrētu viedokli un izvēlas atbildi „ne piekrītu, ne nepiekrītu". Tas liecina par to, ka vai nu vecāki vispār neuzskata tos par aktuāliem jautājumiem, vai arī neredz to vietu sociālo zinību stundās. Līdzīga situācija ir ar pašnāvības tēmu – tās iekļaušanai mācību saturā pilnībā piekrīt vai piekrīt 46% respondentu, taču lielākā daļa no pārējiem konkrētu viedokli nepauž, jo pilnībā nepiekrīt vai nepiekrīt tikai 57 jeb 24% aptaujāto.

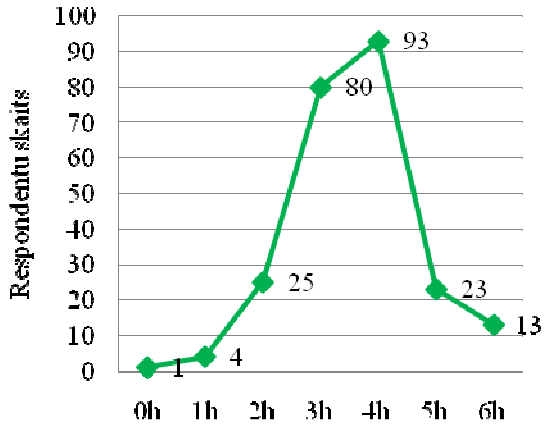
Līdztekus iepriekš aprakstītajām zināšanām sociālo zinību stundās tiek attīstītas dažādas prasmes, kuru nozīme skolēnu attīstībā no izglītības politikas veidotāju puses tiek īpaši uzsvērta. Kā nozīmīgākās prasmes, kas skolēniem būtu jāiegūst sociālo zinību stundās, vecāki atzīst ētisko vērtību izkopšanu un lēmumu pieņemšanu saskaņā ar tām un saskarsmes un sadarbības prasmes. Abām minētajām prasmju grupām kopējais indekss ir 1,22. Ētisko vērtību izkopšana ir cieši saistīta ar iepriekš aprakstīto izpratnes gūšanu par ētiskajām vērtībām, kuras kopējais indekss ir 1,3. Tātad vecāki nedaudz augstāk vērtē zināšanas nekā prasmes, taču šī atšķirība ir neliela un nav uzskatāma par būtisku. Kā nozīmīgas minētas arī saskarsmes un sadarbības prasmes, kuru attīstīšanai sociālo zinību stundās pilnībā piekrīt vai piekrīt 206 jeb 86% aptaujāto. Šo prasmju atzīšana liecina par to, ka vecākiem ir svarīgi, lai viņu bērni iemācītos veidot un uzturēt attiecības ar apkārtējiem – draugiem, klasesbiedriem, ģimenes locekļiem. Netieši tiek norādīts, ka viņi izprot sadarbības lomu veiksmīgu personīgo, kā arī profesionālo attiecību veidošanā. Vai šīs saskarsmes un sadarbības prasmes vecāki attiecina arī uz plašāku sabiedrību, nav zināms, jo izvērtējot zināšanu nepieciešamību par sabiedrības sociālpolitiskajiem un ekonomiskajiem procesiem viņi tik pozitīvi noskaņoti nebija. Salīdzinājumam: kopējais indekss šīm zināšanu grupām ir 0,67 un 0,5, kas ir būtiski mazāks par kopējo indeksu 1,22 saskarsmes un sadarbības prasmēm.

Prasmes pētīt un analizēt sabiedriskās norises un personības attīstību un prasmi mācīties sociālās zinības vecāki vērtē kā mazāk nepieciešamu nekā iepriekš minētās, taču tas nenozīmē, ka tās tiek vērtētas kā mazsvarīgas. 72% aptaujāto pilnībā piekrīt vai piekrīt, ka bērniem ir jāprot pētīt un analizēt sabiedriskās norises un personības attīstību. Prasmes mācīties sociālās zinības kā

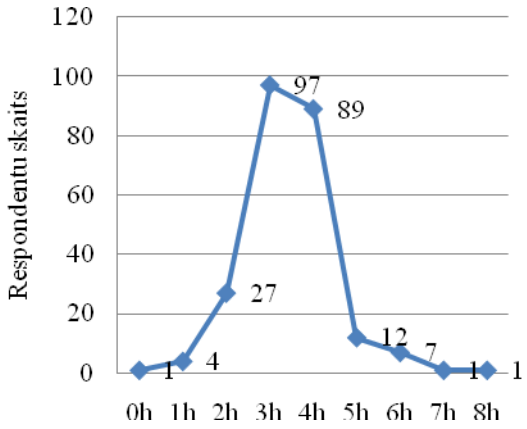
nepieciešamas atzīst 169 jeb 71% aptaujāto. Kopējo indeksu vērtības abām minētajām prasmju grupām ir attiecīgi 0,93 un 0,9, kas ir mazāk nekā saskarsmes un sadarbības prasmēm, ētisko vērtību izkopšanai, kā arī zināšanām par veselību, ētiskajām vērtībām, drošību, cilvēka fizisko un garīgo attīstību.

Taču vēl mazāks kopējais indekss ir demokrātiskas pilsoniskās līdzdalības prasmēm un tolerantai attieksmei pret kultūru daudzveidību, t.i., attiecīgi 0,51 un 0,84. Šie rezultāti apstiprina jau iepriekš minētu faktu, ka vecāki zināšanas un prasmes, kas saistītas ar pilsonisko izglītību, vērtē salīdzinoši zemāk nekā pārējās. Tas gan nenozīmē, ka tās tiek vērtētas negatīvi un tām, respondentuprāt, nebūtu jābūt sociālo zinību saturā, taču tās par nepieciešamām uzskata salīdzinoši mazāks aptaujāto skaits.

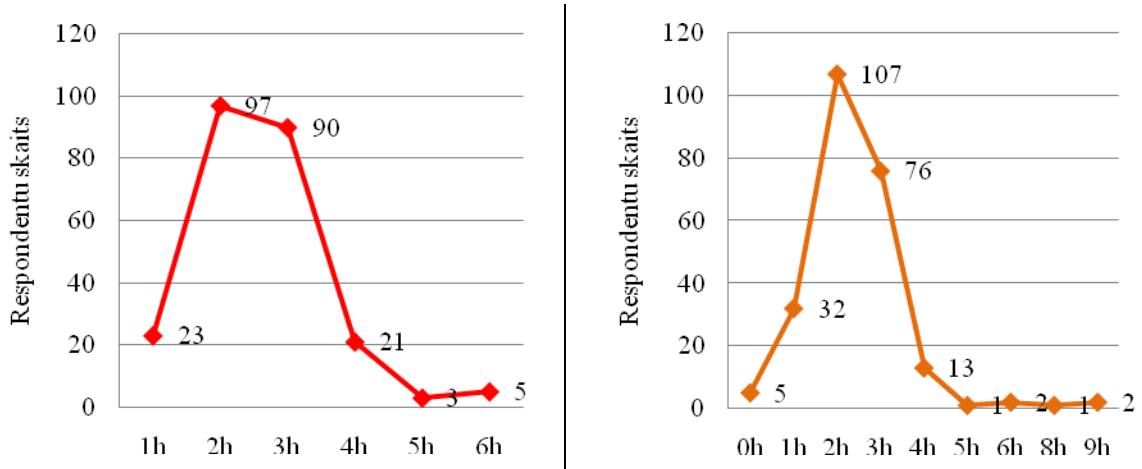
Vecāku viedokļi, kādam jābūt mācību priekšmetam „Sociālās zinības", tika daļēji raksturoti, analizējot viņu vērtējumus par konkrētiem standarta elementiem: zināšanām, prasmēm. Taču kopumā vecāki, ja viņiem tiktu dota iespēja veidot šī mācību priekšmeta saturu, lielāku uzmanību pievērstu veselības izglītības jautājumiem (skat. 1.att.), ko apliecina arī iepriekš analizētie pētījuma rezultāti.



Veselības izglītība (n=239)



Ētikas izglītība (n=239)



Ekonomikas izglītība (n=239) Pilsoniskā izglītība (n=239)

5.att. **Veselības, ētikas, ekonomikas un pilsoniskās izglītības vēlamais īpatsvars 12 stundās vecāku vērtējumā (n=239)**

Kā atzīst lielākā daļa aptaujāto vecāku, veselības izglītībai integrētajā mācību priekšmetā „Sociālās zinības" būtu jāvelta vislielākā uzmanība. 80 jeb 34% no aptaujātajiem uzskata, ka no12 stundām 3 stundas jāmāca veselības jautājumi, bet 93 jeb 39% aptaujāto uzskata, ka 4 stundas. Lai gan ir salīdzinoši liela viedokļu izkliede (standartnovirze ir 1,06), vidēji veselības izglītībai būtu nepieciešamas 3,59 stundas. Tātad to īpatsvaram sociālajās zinībās jābūt 30% lielam vecāku skatījumā.

Ētikas izglītības tematika tiek vērtēta kā otrā nozīmīgākā sociālajās zinībās, jo 12 stundu ciklā tai vecāku skatījumā nepieciešams veltīt vidēji 3,44 stundas. Par to vecāki pauž lielāku vienprātību nekā par veselības izglītību, jo standartnovirzes vērtība ir mazāka, t.i., 1,018. Tādējādi ētikas īpatsvars sociālajās zinībās vecāku skatījumā veidotu 29%.

Turpretim ekonomikas izglītības īpatsvaram jābūt 22% no visa apjoma. Kā liecina aptaujas rezultāti, 12 stundu ciklā ekonomikas jautājumu apskatei būtu jāvelta vidēji 2,58 stundas. Turklāt par šo vecāku viedokļi ir vēl mazāk izkliedēti nekā par iepriekšējiem jautājumiem, jo standartnovirzes vērtība ir 0,971.

Vismazāk stundu vecāki piešķir pilsoniskajai izglītībai, t.i., vidēji 2,38 stundas no 12. Tādējādi šīs izglītības jomas īpatsvars sociālajās zinībās būtu 19%. Taču šeit vērojama diezgan liela viedokļu izkliede, jo standartnovirzes vērtība ir vislielākā 1,16 un galējās robežas ir no 0 – 9 stundām. Turpretim, izvērtējot pārējās izglītības jomas, maksimālā stundu robeža veselības un ekonomikas izglītībai ir 6 stundas, bet ētikas izglītībai 8 stundas.

Interesanti, ka 60 jeb 25% aptaujāto vecāku no 239 visām minētajām izglītības jomām piešķir vienādu stundu skaitu, t.i., no 12 stundām katrai 3. Tādējādi viņi nepiešķir prioritāti nevienai jomai un uzskata, ka sociālajās zinībās vienlīdzīgi nepieciešamas visas.

Secinājumi

1. Vecāku kļūšana par aktīviem skolu sadarbības partneriem, nosakot izglītības mērķus un virzienu ir būtisks pavērsiens mūsdienu izglītības sistēmā. Tradicionālā prakse, kurā vecāki ir kā skolu klienti un pasīvi vērotāji, vairs nenodrošina efektīvu bērna izglītošanās procesu un gan izglītības jomas profesionāļi, gan paši vecāki meklē jaunus risinājumus. Vecāki sadarbojas ar skolotājiem, risina konkrētas problēmas, palīdz saviem bērniem tikt galā ar mācīšanās grūtībām. Taču vecākiem ir iespējas iesaistīties izglītības sistēmā arī augstākā līmenī – pieņemt izglītības saturu ietekmējošus lēmumus, vērtēt to un piedāvāt savus priekšlikumus izglītības politikas veidošanā. Sociālās zinības ir viens no tiem mācību priekšmetiem pamatskolā, kurā vecāku iesaiste ir būtiska gan augstākajā līmenī, gan zemākajā – palīdzot saviem bērniem apgūt nepieciešamās zināšanas un prasmes. Līdz ar to viņu viedokļi par šī priekšmeta nepieciešamību un ietverto saturu ir īpaši svarīgi. Sociālo zinību kvalitatīvu apguvi ietekmējošs faktors ir šī mācību priekšmeta mērķa un sasniedzamo rezultātu atbilstība vecāku priekšstatiem par to, kādai jābūt labai izglītībai.
2. Vecāki sociālajās zinībās iegūstamās zināšanas vērtē pozitīvi un īpaši atbalsta veselības, ētikas un drošības jautājumu iekļaušanu saturā. Mazāka vienprātība ir viņu vidū, vērtējot ekonomikas un pilsoniskās izglītības zināšanas, taču to mācīšana skolā nopietni netiek apšaubīta. Lai gan veselības izglītība tiek vērtēta kā visbūtiskākā, izvērtējot konkrētus ar veselību saistītus tematus, vecāki izrāda šaubas, vai visām sociālo zinību standartā minētajām zināšanām ir vieta sociālo zinību stundās.
3. Sociālo zinību standarta veidotāji ir paredzējuši, ka noteiktu prasmju attīstīšana skolēniem ir galvenā sociālo zinību stundu sastāvdaļa, turpretim vecāku vērtējumā to pārākums pār zināšanām neparādās. Vecāki atzīst par būtiskām saskarsmes un sadarbības prasmes un savu ētisko vērtību izkopšanu, taču salīdzinoši mazāku nozīmi piešķir demokrātiskās līdzdalības prasmēm. Tādējādi gan zināšanas, gan prasmes, kas saistītas ar sociālpolitisko procesu izpratni un aktīvu līdzdalību sabiedrībā un valstī, vecāki vērtē zemāk. Izsakot šādus vērtējumus, viņi netieši norāda uz pilsoniskās izglītības mazāku nozīmi attiecībā pret pārējām – veselību, ētiku un ekonomiku.

4. To apliecina arī vecāku piedāvātais četru izglītības jomu – veselības, ētikas, ekonomikas un pilsoniskās – sadalījums sociālajās zinībās. Lielāks nepieciešamo stundu skaits tiek piešķirts veselībai un ētikai, bet mazāks – ekonomikai un pilsoniskajai izglītībai.
5. Līdz ar to iespējams apgalvot, ka izglītības politikas veidotāju piedāvātais skolēna ideāls - veselīgs un veselību veicinošs, tolerants, saimniecisks, labs savas valsts pilsonis – tikai daļēji atbilst vecāku skatījumam. Viņu sociālo zinību satura vērtējums liecina par to, ka skolēnam vajadzētu būt veselīgam un veselību veicinošam, nedaudz saimnieciskam, labam cilvēkam. Viņam nav obligāti jābūt tolerantam un labam savas valsts pilsonim. Kā liecina pilotpētījuma rezultāti, kopumā vecākiem ir būtiski iebildumi par konkrētiem sociālo zinību jautājumiem, taču netiek fundamentāli apšaubīts šī mācību priekšmeta mērķis un sasniedzamie rezultāti. Būtu nepieciešami turpmāki pētījumi šajā jomā, lai pārbaudītu izdarītos secinājumus.

Izmantoto literatūras avotu saraksts

1. Avotiņa, G., Ose, L., Rocēna, I., Rubana I. M. Mācību metodika sociālajās zinībās. Integrēta pieeja. Rīga: Sorosa fonds – Latvija, 2003. 73 lpp.
2. Kristapsone, S. Zinātniskā pētniecība studiju procesā. Rīga: Biznesa augstskola Turība, 2008. 352 lpp.
3. Sociālās zinības. Mācību priekšmeta standarts 1. – 9. klasei. MK noteikumu nr. 1027 17. Pielikums, 19.12.2006 [atsauce 12.10.2010]. Pieejams: www.likumi.lv
4. Sociālās zinības 1. – 9. Klasei. Pamatizglītības mācību priekšmeta programmas paraugs. Valsts izglītības eksaminācijas centrs [atsauce 12.10.2010]. Pieejams: http://visc.gov.lv/saturs/vispizgl/programmas/pamskolai/soczin.pdf

E-STUDIJU MĀCĪBU FORMAS PERSPEKTĪVAS JELGAVAS VIDUSSKOLU SKOLĒNU IZPRATNĒ

THE PERSPECTIVES OF E-LEARNING FORMS: JELGAVA HIGH SCHOOL STUDENTS` PERCEPTIONS

Kitija Kirila, Dr.oec., Latvijas Lauksaimniecības universitāte
Lielajā 2, Jelgavā, LV-3001, e-pasts: Kitija.Kirila@llu.lv, tālr. 29595431
Kitija Namniece, Bac.sc.soc., Latvijas Lauksaimniecības universitāte
Lielajā 2, Jelgavā, LV-3001, e-pasts: kitijan@tvnet.lv, tālr. 26789405

Abstract. The number of high school students and young people, who are willing to pursue studies, has rapidly decreased in our country and a lot of young people are leaving to look for employment opportunities abroad. Therefore, the introducing of E-studies is one of the possibilities to continue schooling. However, there is an important question, whether high school students are aware of such a form of studies and whether they are ready for it, and how many of them are prepared for it.
Education as a social institution is usually perceived as a body of organizations, approved by society, in which training of diverse kinds and levels is implemented. Learning and teaching is the basis of the educational institution. E-University is a type of educational institutions, and e-studies are a form of teaching and learning.
Key words: educational institution, lifelong learning, learning, e-studies.

Ievads

Globalizācija un tehnoloģiskais process mūsdienās būtiski ietekmē izglītības tirgu. Šī brīža ekonomiskajos apstākļos ļoti svarīga ir iespēja darbu apvienot ar mācībām, kā arī mācīties/studēt neizejot no mājām/darba vietas. Tas pieprasa jaunas izglītības apguves formas.

Līdz ar to aktualizējas jautājums par E –studijām un to iespējamību. Taču svarīgs ir jautājums- vai vidusskolēni ir informēti par šādu studiju veidu un vai un cik daudz ir tam gatavi.

Pētījuma mērķis: Novērtēt Jelgavas vidusskolēnu priekšstatus par E-studijām kā mācību formu.

Pētījuma mērķa sasniegšanai izmantotas šādas zinātnisko **pētījumu metodes** – monogrāfiskā jeb aprakstošā metode un socioloģisko pētījumu metode– aptauja.

Rezultāti

1. Izglītības institūta socioloģiskā izpratne

Termins ”**institūts**” ietver sevī daudz paskaidrojošo elementu. Šis vārds cēlies no latīņu vārda *institutum*, kas tulkojumā nozīmē „iekārta”. Socioloģijā vārdus “sociālais institūts” un “sociālā institūcija” lieto citādā nozīmē nekā vispārējā valodā, kur par institūtu sauc, pirmām kārtām, pētniecības vai mācību iestādi, bet institūciju - likumdevējas un izpildvaras iestādi. **Socioloģijā institūts ir** savstarpēji saistītu darbības principu un normas sistēma, kas, savukārt, izriet no svarīgākām sabiedrības vajadzībām un funkcijām, un institūcija ir institūta izpausme, noturīga

kopdarbības un sabiedrības organizācija. (Zepa B. un Zobena A., 1996)

Pēc sociologa L.Bovjē uzskatiem, **sociālais institūts** ir kultūras sistēma, kura orientējas konkrēta mērķa sasniegšanai. Indivīds piedalās institūtā caur sociālā statusa mehānismu. Franču sociologs Emīls Dirkems uzsver, ka bez institūcijas mūsu sabiedrība nevar pastāvēt. (Добреньков В.И., Кравченко А.И., 2004; Émile Durkheim, Sk. int. 15.04.2011.)

Izglītība savā struktūrā ietver izglītību kā procesu un kā rezultātu, kurš realizējas zināšanās un prasmēs, attieksmēs un vērtīborientācijās. **Izglītības socioloģija** ir socioloģijas nozare, kura pēta izglītības kā sociāla institūta attīstības un funkcionēšanas likumsakarības un tās mijiedarbību ar sabiedrību. (Krieviņš V., 2001)

Izglītības institūtu socioloģijā var saskatīt kā vienu no **indivīda socializācijas īstenotājiem.** Izglītība kā sociālais institūts parasti tiek uztverta kā sabiedrības sankcionēts organizāciju kopums, kurā realizējas dažādu veidu un līmeņa apmācības. (Laķis P., 2002)

Mūsdienās izglītības institūts pastāvīgi mainās. Līdz ar to autores uzskata, ka izglītības institūts ir pakļauts sociālajām pārmaiņām, ko skata Sociālo pārmaiņu (izmaiņu) teorija.

Sociālo pārmaiņu teorija (koncepcija) sevī ietver sekojošu pamatbāzi – atšķirībām jāskar dažādi laika momenti un stāvokļi vienā un tajā pašā sistēmā. Precīzāk izsakoties – sociālās pārmaiņas saprot kā jebkuru nenovēršamu pārmaiņu sociālajā sistēmā, kas jāskata vienotā veselumā. Pārmaiņu veidi ir dažādi un var atšķirties atkarībā no tā, kādi tieši aspekti, fragmenti un sistēmas pārmaiņas tajā ir iekļautas. (Штомпка П., 1996.: 21)

Autores uzskata, ka E –studiju ieviešana arī ir sociāla pārmaiņa, jo tiek mainīti, piemēram, izglītības sistēmas elementi un saistības, mainās mijiedarbība no klātienes kontakta ar pasniedzēju uz *online* kontaktu, mainās studiju materiāla pasniegšanas veids u.t.t.

Taču, lai kāda arī nebūtu studiju forma vai veids, tā tik un tā ir mācīšanās. Savukārt mācīšanās un mācīšana ir Izglītības institūta pamats.

2. Mācīšanās kā sociokulturālās darbības veids

Mācīšanās ir vispārpieņemts jēdziens, kurš saturā ietver procesa un darbības raksturojumu, tas ir, skolēna un mācošā mijiedarbību. Tās izpratnē pamatā ir trīs **pieejas**: zināšanu apgūšana; pieredzes apgūšana; kultūras mantojuma apgūšana. (Krieviņš V., 2001)

Pedagoģiskās psiholoģijas speciālists Žans Piažē *(Jean Piaget, 1896. – 1980.)* teicis, ka „Izglītības galvenais mērķis ir izveidot cilvēkus, kuri spēj paveikt kaut ko jaunu, nevis tikai atkārtot to, ko darījušas jau iepriekšējās paaudzes,- radošus cilvēkus, kuri spēj izgudrot un atklāt. Izglītības mērķis ir veidot cilvēkiem kritisku prātu, kas spēj pārbaudīt, nevis tikai pieņemt visu, kas viņiem tiek piedāvāts.” (Jean Piaget, Sk.int. 21.01.2011.)

Izglītības reformas un mācību procesa pilnveidošana prasa jaunu mācību tehnoloģiju ieviešanu. To ieviešanas laikā jāpievērš uzmanība šādiem jautājumiem:

- kā ieviest aktīvās mācību metodes un atjaunot vecās;
- kā jaunās tehnoloģijas lietot pašizglītības un nepārtrauktās izglītības apstākļos;
- kā pārveidot esošās mācību tehnoloģijas, izmantojot mūsdienu zinātnes un tehnikas sasniegumus;
- kā darbosies mācību un ārpusmācību metodes savstarpējā saikne.

Pie **elementāram mācību metodēm** pieder: stundas, lekcijas, semināri, problēmseminări, praktiskās un patstāvīgās nodarbības.

Jaunākās mācību metodes: lietišķās spēles; paneļdiskusijas un debates; radošās darbnīcas „*workshop*"; „*Brainstorm*" spēles; preses konferences; radošā darba skates, zinātniskās konferences; projektu nedēļas, dienas; interešu grupu darbs; mācošās datorprogrammas dialoga režīmā, multimediji. (Krieviņš V., 2001)

Šobrīd mūsdienu sabiedrība pakļauta dažādām pārmaiņām. Pārmaiņas pašas par sevi nav nekas jauns. Jauna ir pārmaiņu tempa paātrināšanās. Cilvēce ir sasniegusi tādu attīstības pakāpi, kad pārmaiņas norisinās ļoti strauji. Tāpēc noteikti ir nepieciešams pārvērtēt vērtības, uzskatus un izturēšanās normas.

Apkopojot informāciju (Варакин Л. Е., 2001., Information society, Sk. int.25.04.2011., Karnītis E., 2002., Žogla I., 2001. u.c.) ir skaidrs, ka informācija, zināšanas un izglītība ir ļoti svarīgas. Lai sabiedrības locekļi iegūtu nepieciešamās zināšanas, kas nepieciešamas dzīvē un darbā, nepieciešams mācīties un izglītoties visu mūžu.

Ņemot vērā to, ka šobrīd samazinājies kopējais skolēnu/studentu skaits valstī, izglītības iestādēm, it īpaši augstākās izglītības iestādēm, ir jāpārdomā studiju formas un studiju pieejamība arī tiem jauniešiem, kuri apstākļu spiesti ir pametuši vai grasās pamest valsti, taču labprāt iegūtu augstāko izglītību. Līdz ar to kā viena no iespējām ir E –studiju ieviešana.

3. E-tehnoloģiju izmantošana studiju procesā

Lai ieviestu EK Lisabonas stratēģiju, nepieciešami uzlabojumi izglītības sistēmā. E-studijas atzītas par jaunās, uz zināšanām balstītās ekonomikas virzītājspēku un ļoti svarīgu elementu Informācijas Sabiedrības attīstībā. Virzība uz ekselenci (izcilību, pilnību) e-studijās ir nozīmīga globālās ekonomiskās konkurences kontekstā. Plašāka e-studiju ieviešana atzīta par izšķirošu faktoru panākumu sasniegšanai (eLearning, Sk. int. 29.04.2011.)

E-studijas kā mācību forma ir mācību veids, kas balstās uz datoru un Internet izmantošanu

mācību vajadzībām, tādā veidā nodrošinot augstāku studiju pieejamību un kvalitāti.

E-studijas - Formālās un ikdienas (*informal*) mācīšanās procesi, virtuālās grupas un pasākumi, lietojot visdažādākos elektroniskos līdzekļus: *internetu*, *intranetu*, *extranetu*, CDROM, videolentas, TV, mobilos telefonus, plaukstdatorus u. tml. (E-learning Glossary, Sk. int. 15.11.2010., Labās prakses rokasgrāmata, 2005. Sk. int. 15.11.2010.)

E-studijas kā mācību forma arvien plašāk praktizētas universitātēs, un tās nodrošina daudzveidīgu mācību satura pieejamību, izmantojot multimediju kompaktdiskus, drukātos materiālus un iespēju darboties universitātes E-studiju forumos, kontaktēties ar pasniedzējiem gan diskusiju dēļos, gan klātienē. E-studijas kā mācību forma un tālmācības mācību forma cilvēkam piedāvā ļoti plašas izvēles iespējas ieguldītā laika, investēto līdzekļu un apgūto zināšanu apjoma ziņā. (E –studijas, Sk. int. 15.11.2010.)

Interaktīvā E-studiju mācību forma ātri attīstās, gūst popularitāti, bet tomēr tā prasa no studenta lielāku koncentrēšanos, lielāku pašnovērtējumu un disciplīnu, salīdzinot standarta klātienes mācību formu, lai mācību process būtu efektīvs.

Mūsdienu izglītības sistēmas viens no jauninājumiem ir **E-universitātes**, kas ir kā **izglītības institūta forma**. **E-universitātes** motivē studentus apgūt jaunās informācijas un komunikācijas tehnoloģijas, kas tiek izmantotas mācību procesā. Universitātes tiecas izveidot E-studiju kā mācību formas kursus, tas paplašina arī savstarpēju universitāšu sadarbību. Apgūstot studiju vai mācību kursus E – universitātē, studentiem ir plašākas iespējas izmantot dažādu augstskolu bibliotēku resursus, bibliotēku datu bāzes u.tml. Ir skaidrs, ka E – universitātēs kā galvenais mācību veids ir E –studijas.

Apkopojot autoru rīcībā esošo informāciju, autores secina, ka E –studiju ieviešanai ir gan savas pozitīvās iezīmes, gan arī savi trūkumi jeb speciālistu un praktiķu saskatītās problēmas. Taču, ieviešot E –studijas augstskolās, vissvarīgākais tomēr ir būt drošiem, ka vidusskolu absolventi vēlas pieteikties studijām E –studiju veidā un ir informēti par tām.

4. Jelgavas vidusskolēnu priekšstats par E -studijām kā mācību formu

Vidusskolu absolventiem šobrīd ir aktuāls jautājums par turpmākām studijām, kāda veida izglītību tālāk izvēlēties – augstākās mācību iestādes, profesionālās mācību iestādes, vai neturpināt mācības vispār.

Ļoti būtisks faktors, kas ietekmē šo izvēli, ir ekonomiskā un finansiālā situācija ģimenē un valstī kopumā, iespēja izbraukāt mācību iestādes, motivācija mācīties/studēt. Šo izglītības izvēli ietekmē arī atalgota darba iegūšanas iespējas, tamdēļ, bieži vien izvēlas profesionālās mācību iestādes, kur pēc mācību beigšanas, tiek iegūts arī amats.

Lai sasniegtu pētījumā izvirzīto mērķi, tika veikta Jelgavas vidusskolēnu aptauja.

Kvantitatīvais pētījums veikts 2011. gada janvārī Jelgavā. Aptaujā piedalījās četru Jelgavas pilsētas vidusskolu 12. klases skolēni. Kopumā randomizēti netiešajā izlasē anketēti 125 12. klases audzēkņi. Katram tika izdalīta anketa, kuru pēc tam vidusskolēns atdeva atpakaļ. Anketa ir anonīma, kas ļauj iegūt patiesāku informāciju. Kopā aptaujā tika analizētas 117 aizpildītas anketas, jo 8 anketas nebija pilnībā aizpildītas, kas tika uzskatītas par nederīgām..

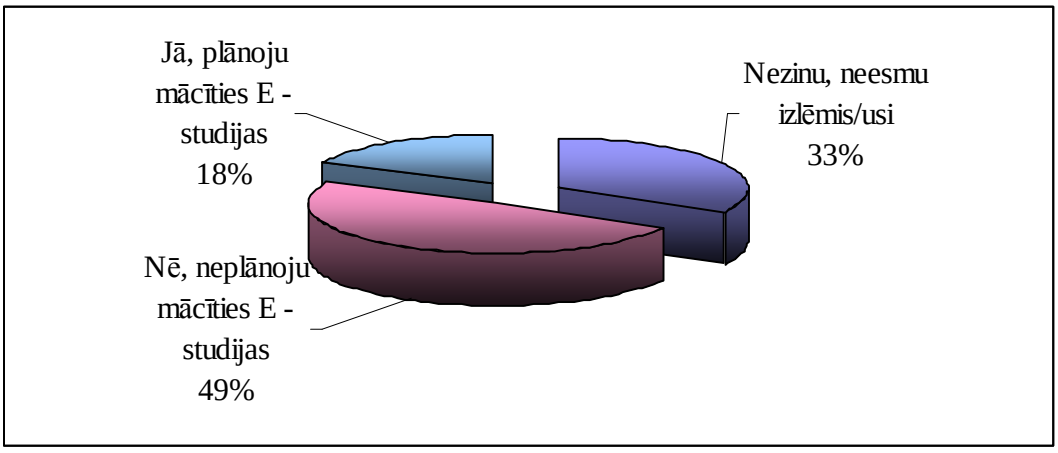
No 117 skolēniem 48 anketas aizpildīja vīrieši un 69 anketas aizpildīja sievietes. Attiecīgi 41% vīrieši 59% sievietes piedalījās aptaujā.

79% no skolēnu kopskaita bija vecumā no 15-18 gadiem, bet 21% bija vecumā no 19-23 gadiem. Vīrieši vecumā no 15-18 gadiem bija 77%, vecumā no 19-23 gadiem 23%. Sievietes vecumā no 15-18 gadiem bija 81%, bet vecumā no 19-23 gadiem bija 19%.

Vērtējot Jelgavas vidusskolu 12. klases **skolēnu zināšanas par E-studijām**, noskaidrots, ka brīvi orientējas un ļoti labi pārzina E-studiju kā mācību formu tikai 8% no skolēnu kopskaita, bet vislielākais skaits (21%) ir to skolēnu, kuri ir kaut ko dzirdējuši par E –studiju formu. Tas nozīmē, ka nepieciešams vairāk informēt skolēnus un sabiedrību par šādām mācību formām.

Pētījumā noskaidrots, ka **turpināt studijas augstākajās mācību iestādēs** izvēlējušies 45% procenti no kopējā respondentu skaita. Profesionālo izglītību izvēlējušies 12% no respondentiem. Ir arī respondentu grupa, kura plāno studijas pēc vidusskolas absolvēšanas, bet nav izdarījuši savu galīgo izvēli. Tādi ir 22 skolēni jeb 19% no respondentu skaita. Neturpināt mācības izvēlējušies 25 skolēni jeb 24% respondentu.

Skolēnu ieinteresētība iegūt izglītību tieši E-studiju mācību formā attēlota 1.attēlā.



1.att. Rezultāti par Jelgavas vidusskolu 12.klases skolēnu izvēli par izglītības iegūšanu pēc vidusskolas absolvēšanas
(Atspoguļots procentuāli no kopējā respondentu skaita)

Kopumā jau ieinteresēti E-studiju mācību formā ir 21 skolēns jeb 18% no visiem respondentiem. Nevarēja izlemt kopumā 39 skolēni jeb 33% no visiem respondentiem. Ja šie skolēni, kas vēl nav izlēmuši, vai turpināt studijas E-studijas formā, tomēr nosliecas par labu E-studiju mācību formai, izriet, ka kopskaits par E-studiju mācību formas izvēli iespējams varētu būt pat 60% no respondentiem. Skolēni, kuri neplāno iegūt izglītību E-studiju formā, ir 57 jeb 49% no respondentiem.

Vērtējot skolēnu informētību par **augstskolu skaitu Latvijā, kurās jau pieejamas E-studijas** kā mācību forma, noskaidrots, ka 13%, uzskata, ka Latvijā ir tikai viena augstskola, kurā jau ir pieejamas mācības E-studiju formā. Vērtējot datus, lielākais īpatsvars uzskata, ka Latvijā divās vai trijās augstskolās jau pastāv E-studiju mācību forma. Bet ir arī salīdzinoši liels procents, tas ir, 17% no vidusskolēniem, kas nezināja, cik augstskolās Latvijā tomēr iespējams iegūt izglītību šādā mācību formā. Tas nozīmē, ka ir vairāk jāpopularizē un jāinformē vidusskolēni par šāda veida mācību/studiju iespējām, tas arī papildus motivētu skolēnus interesēties par studijām, motivētu viņus turpināt mācības augstākajās mācību iestādēs. Tas kopumā varētu palielināt izglītības līmeni valstī, iedrošinātu skolēnus un pārējos iedzīvotājus interesēties un pievērsties E-studijām.

Pētījumā noskaidrots, ka 14 skolēni jeb 12% no respondentiem ir izlēmuši mācīties ārzemēs. Par savu izvēli svārstījās 21 jeb 17% no respondentiem. Tomēr tas ir salīdzinoši liels respondentu atbilžu procents 29%, un, ja šī skolēnu grupa būs motivēta mācīties ārzemēs un aizbraukt no Latvijas, arī viņi piebiedrosies pie ārzemēs izglītības ieguvēju gribētāja kopskaita. Ņemot vērā skolēnu interesi par studijām ārpus Latvijas, rodas jautājums, vai kāds no viņiem ir **informēts par E-studiju kā mācību formas studijām ārzemēs.** Pētījumā noskaidrots, ka par E-studijām ārzemēs ir izlēmuši 7 skolēni jeb 6% no visiem respondentiem.

Kā jau katrai mācību metodei, nepieciešams novērtēt tās **efektivitāti un priekšrocības**.

Kopumā skolēni visvairāk atzīmēja **pozitīvo** pie tādiem aspektiem kā – studijas notiek sev tīkamajā laikā, tad iespējams apvienot mācības ar darbu, iespējams plānot savu studiju laiku, iespējams plānot savu studiju kursu struktūru. Vislielāko atbalstu skolēni izrādīja finansiāliem apstākļiem, ka ir iespējams ekonomēt naudas līdzekļus. Pozitīvi novērtēts arī tas, ka jebkurā pasaules vietā var studēt savas studijas, jebkurā diennakts laikā var piekļūt studiju materiāliem un bibliotēku materiāliem.

Kā **E-studiju mācības formas trūkumus** skolēni nosauca, piemēram, ka nav tomēr lekciju veidu. Ja nesaprot kādu uzdoto vielu, nav ar ko pakonsultēties. Nosaukts bija, ka nepieciešams mājās *Internet* pieslēgums, kas ir papildus izmaksas, kā arī students ir atkarīgs no elektrības padeves un *Internet* piegādātājfirmas. Nosauca, ka studiju samaksai jābūt lētākai nekā klātienes

lekciju veidu mācībām. Šajā jautājumā autores nepiekrīt, jo E –studijas prasa papildus darbu arī no pasniedzēju puses, kā arī var gadīties, ka nepieciešams daudz vairāk sazināties elektroniski ar studentiem, atbildot uz neskaidrajiem jautājumiem, sniedzot konsultācijas, kas atkal ir papildus laiks un darbs. Skolēni piebilst, ka mācoties E-studiju mācību formā nav iespējams bieži satikt savus kursabiedrus un rīkot ar viņiem pārrunas un diskusijas. Kopumā visvairāk nosaukti piemēri bija tieši par komunikācijas trūkumu ar pasniedzējiem un saviem topošajiem kursabiedriem. Interesants minējums bija, ka tā dzīve pārvēršas tīri virtuāla, maz saskarsmes ar sabiedrību, nav iespējams satikt savus kursabiedrus un pārrunāt ar viņiem gan lekcijas, gan noorganizēt pasākumus. Pētījuma autores piebilst, ka profesionāli vadot E –studijas, var arī būt ļoti daudz komunikācijas ne tikai starp pasniedzēju un studentu, bet arī starp pasniedzēju un studentiem vai studentiem savstarpēji, rīkojot forumus, video konferences u.tml.

Jauno tehnoloģiju ieviešana mācību procesā nodrošina E-studiju kā mācību formas pastāvēšanu, efektivitāti. Gan pasniedzējiem, gan studentiem nākas saskarties ar to, ka šīs tehnoloģijas ir jāapgūst. Skolēni vērtēja sevi kā tehniskus cilvēkus, attiecīgi, negatīvi, jo savas prasmes novērtējuši kā ne izteikti tehniskas kopskaitā 34 skolēni jeb 29% no skolēnu kopskaita. Negatīvi cita iemesla pēc norādīja kopskaitā 8 skolēni jeb 7% no skolēniem kopumā. Savukārt, kā citu atbildi norādīja 3 skolēni jeb 4% no skolēnu kopskaita.

Apkopojot pētījuma rezultātā iegūto informāciju, autores secina, ka skolēniem **ir nepietiekamas zināšanas par E-studijām kā mācību veidu**. To ietekmē vairāki faktori, piemēram, skolotāju ieinteresētība/neieinteresētība informēt skolēnus par šādām studijām, maza augstskolu reklamēšana, skolēni nav nomotivēti pagaidām turpināt mācības augstākajās mācību iestādēs. Lielu nozīmi pētījumā autores pievērsa skolēnu informētībai un attieksmei pret jaunākajām informācijas tehnoloģijām, to pielietojumu sadzīvē un mācību procesā, kā arī skolēnu viedokli, kā šīs tehnoloģijas paver iespēju uzlabot mācību kvalitāti. Var droši spriest, ka mūsdienu **skolēni ir ļoti erudīti un tehniski, viņiem interesē informācijas tehnoloģiju attīstība**, viņi apzinās, ka ar šīm iespējām viņiem ir iespēja gan mācīties mājās, gan piekļūt ārzemju augstskolu bibliotēkām. **Par iespējām studēt ārzemēs domā pietiekami liels skolēnu skaits**, lai tam pievērstu uzmanību. Skolēni izvēlējušies šādu iespēju gan Latvijas ekonomiskā situācijas dēļ, gan skolēnu vēlme iegūt starptautisku izglītību, gan arī finansiālie apstākļi ģimenēs, jo pastāv liels skaits starptautisku augstskolu, kur studiju maksa nav jāmaksā, studenti tiek arī papildus atbalstīti ar stipendijām, lai spētu jau pastāvīgi sevi nodrošināt.

Secinājumi

1. Izglītības institūtu socioloģijā var saskatīt kā vienu no indivīda socializācijas īstenotājiem, kurš sniedz cilvēka darba dzīvei nepieciešamās zināšanas un praktiskās iemaņas. Izglītība kā sociālais institūts parasti tiek uztverta kā sabiedrības sankcionēts organizāciju kopums, kurā realizējas dažādu veidu un līmeņa apmācības.
2. Mācīšanās un mācīšana ir Izglītības institūta pamats. E –universitātes ir viens no izglītības institūtu veidiem, savukārt E –studijas ir viens no mācīšanas un mācīšanās veidiem.
3. Pētījumā noskaidrots, ka turpināt studijas augstākajās mācību iestādēs izvēlējušies 45% skolēnu, bet kopumā jau ieinteresēti E-studiju mācību formā ir 21 skolēns jeb 18% no visiem respondentiem.
4. Ņemot vērā skolēnu interesi par studijām ārpus Latvijas, rodas jautājums, vai kāds no viņiem ir informēts par E-studiju kā mācību formas studijām ārzemēs. Rezultāti liecina, ka patiešām mūsdienu jaunatne ir ļoti aktīva un ir skolēni no respondentiem, kuri orientējas E-studiju mācību formas piedāvājumā. Tikai par šīs mācību veida izmantošanu nav īpaši aktīvi, jo nejūtas tik pašdisciplinēti, kā arī sakarā ar valstī radušos situāciju, vēl nav izlēmuši, kur tālāk mācīsies pēc vidusskolas absolvēšanas, vai turpinās studēt mācības augstākajās Latvijas augstskolās.
5. Vērtējot E-studiju mācību formas priekšrocības, skolēni visvairāk atzīmēja pozitīvo pie tādiem aspektiem kā – studijas notiek sev tīkamajā laikā, tad iespējams apvienot mācības ar darbu, iespējams plānot savu studiju laiku, iespējams plānot savu studiju kursu struktūru. Vislielāko atbalstu skolēni izrādīja finansiāliem apstākļiem, ka ir iespējams ekonomēt naudas līdzekļus.
6. Visvairāk nosaukti E-studiju mācību formas trūkumi bija tieši komunikācijas trūkums ar pasniedzējiem un saviem topošajiem kursabiedriem. Interesants minējums bija, ka tā dzīve pārvēršas tīri virtuāla, studentam maz saskarsmes ar sabiedrību.

Izmantoto literatūras avotu saraksts

1. E –studijas. Sk. internetā (15.11.2010.) http://www.vu.lv/index.php?option=com_content&view=article&id=16&Itemid=19&lang=lv
2. E-learning Glossary. Sk. internetā (15.11.2010.). http://www.cybermediacreations.com/elearning/glossary.html
3. eLearning. Sk. internetā (29.04.2011.). http://ec.europa.eu/education/archive/elearning/index_en.html
4. Émile Durkheim. Sk. internetā (15.04.2011.). http://en.wikipedia.org/wiki/%C3%89mile_Durkheim
5. Information society, Sk. internetā (25.04.2011.). http://en.wikipedia.org/wiki/Information_society
6. Jean Piaget. Sk. internetā (21.01.2011.) http://en.wikipedia.org/wiki/Jean_Piaget
7. Karnītis E. (2002.) Informācijas sabiedrība – iespējas ikvienam. E-pasaule. Bizness. Tehnoloģijas. Dzīves stils. Novembris, 6.-8. lpp.
8. Krieviņš V. (2001.) Izglītības socioloģija. R: Raka, 6. -66.lpp.

9. Labās prakses rokasgrāmata e-studijās iesaistītajiem, 2005. Sk. internetā (15.11.2010.). http://www.vu.lv/attachments/article/66/e3_GPguide_LV%282%29.pdf
10. Laķis P. (2005.) Socioloģija: ievads socioloģijā. Rīga. 68. – 70.lpp.
11. Zepa B., Zobena A. (1996.) Cilvēks un dzīve socioloģijas skatījumā: ievadkurss skolām un pašmācībai. Rīga: Ranti, 208 lpp.
12. Žogla I. (2001.) Didaktikas teorētiskie pamati. Rīga: Raka, 275 lpp.
13. Варакин Л. Е. (2001.) Глобальное информационное общество: Критерии развития и социально-экономические аспекты. М.: Междунар. акад. связи, 43 с
14. Добреньков В.И., Кравченко А.И. (2004.) Социология: Учебник. М.: ИНФРА-М, 511. – 624.с.
15. Штомка П. (1996.) Социология социальных изменений. М.: Аспект Пресс, 414 с.

STUDENTU VAJADZĪBAS PROFESIONĀLĀS ANGĻU VALODAS STUDIJU KURSĀ LLU

STUDENTS' NEEDS IN ESP AT LATVIA UNIVERSITY OF AGRICULTURE

Ieva Knope, Mg Paed.
LLU/ Department of Languages
knopeieva@inboxx.lv
tel. +37129427849

Abstract. While developing and improving the content of ESP courses according to the students' needs at the Latvia university of Agriculture, general English knowledge, academic and business English knowledge and terminology have to be constructed and fashioned into the ESP courses.
Key words: ESP, tertiary education, needs analysis

Lai īstenotu Latvijas Lauksaimniecības universitātē (LLU) dažādās fakultātēs piedāvāto pamatstudiju programmām izvirzītos mērķus un uzdevumus, kā arī realizētu LLU rīcībpolitikas mērķus, LLU studentiem ir jāapgūst un jāpilnveido akadēmiskiem mērķiem un profesionālajai darbībai nepieciešamās svešvalodas zināšanas un prasmes, lai tās kalpotu par līdzekli profesionālās kvalifikācijas pilnveidei, informācijas ieguvei un apmaiņai, kā arī saskarsmei un komunikācijai situācijās, kas saistītas ar profesionālo darbību vai akadēmiskiem mērķiem.

Profesionālās angļu valodas studiju kurss augstskolas studentiem, galvenokārt, tiek balstīts uz pieeju angļu valodas kā svešvalodas mācīšanā, kas pazīstama kā angļu valoda speciāliem (tiek lietots arī īpašiem, specifiskiem) mērķiem (*English for Specific Purposes (ESP)*). Šīs pieejas pamatā ir valodas apguvēju vajadzību un valodas lietošanas mērķu apzināšanās un izpēte (*Needs Analysis*).

Profesionālā angļu valoda vienmēr ir saistīta ar valodas apguves mērķi un profesionālo darbību, tā ir balstīta uz studentu vajadzību izpēti, koncentrējoties uz dažādiem valodas aspektiem, kas raksturīgi konkrētajai zinātņu nozarei vai darbības sfērai. Saskaņā ar šo pieeju angļu valodas mācīšanā, visnozīmīgākais ir valodas mācīšanās mērķis, kas saistīts ar valodas apguvēju vajadzībām un valodas lietošanas situācijām nākotnē.

K. Hardinga (Harding, 2007.) uzskata, ka profesionālās angļu valodas nozīme mūsdienās arvien pieaug, ko ietekmē tādi faktori kā:

1) pieprasījuma paaugstināšanās pēc profesionālās izglītības un arodapmācības visā pasaulē;
2) globalizācija, kuras procesā angļu valoda kalpo kā starptautiskās saziņas valoda, komunicējot cilvēkiem no dažādām pasaules valstīm;

3) angļu valodas iekļaušana vispārizglītojošā skolā apgūstamo priekšmetu sarakstā aizvien jaunāka vecuma skolēniem, kas visā pasaulē ir vainagojusies ar ievērojamiem panākumiem.

Profesionālās angļu valoda ir kļuvusi par vienu no centrālajiem studiju kursiem profesionālās augstākās izglītības studiju programmās daudzās pasaules valstīs (Centrālamerikā, Dienvidamerikā, Eiropā, Austrālijā, Tālajos Austrumos, Okeānijā, Āfrikā, Ķīnā un Arābu pussalā) turpretī Latvijā vērojama atšķirīga situācija – studiju programmās samazinās profesionālās angļu valodas apguvei paredzēto kredītpunktu un nodarbību skaits. (Lūka, 2008.)

Dažādas **vajadzības** ir cilvēka aktivitātes galvenais avots, kas ir jebkuras personības rīcības pamatā. „Vajadzības rosina personību meklēt tās piepildīšanas ceļus un kļūst par darbības iekšējiem rosinātājiem – motīviem." (Inne, 1996., 17.lpp)

Aprakstot mērķtiecīgas darbības universālo struktūru, A. Broks (2000.) vajadzību un tās apmierināšanai nepieciešamos līdzekļus definē kā mērķtiecīgas darbības ierosinātājus, bet vajadzības apmierinājumu, kā mērķtiecīgas darbības sekas.

D. Prets (2000., 39.lpp.) terminu 'vajadzība' lieto, lai apzīmētu „nesaskaņu starp pašreizējo stāvokli un labāku stāvokli" un vārda 'labāks' lietošanu skaidro ar vajadzību definēšanu vērtību filozofijas terminos. Viņš uzskata, ka izglītojamo vajadzību novērtēšana ir jāveic katram skolotājam un pasniedzējam.

Terminu '**studentu vajadzības**' iespējams interpretēt divējādi:

1) tās ir saistītas ar studentu tālejošiem mērķiem;
2) tās ir saistītas ar uzdevumiem, kas studentiem jāveic.

Pirmajā gadījumā tās ir orientētas uz valodas mācīšanās mērķi, otrajā – uz valodas apguves procesu. (Widdowson, 1986.)

Vajadzību izpēte ir nozīmīga, lai noteiktu vēlamos mācību rezultātus, kas atspoguļojas mācību mērķos un uzdevumos. Vajadzību izpētes metodes jāizvēlas atbilstoši situācijai, kuru analizējot ir būtiski noskaidrot šādus jautājumus:

1. Kādi ir dalībnieku aktuālākie mērķi un uzdevumi?
2. Kā mācības palīdzēs tos sasniegt?
3. Kas jau ir mācīts?
4. Kas ir jāiemāca, jāattīsta, jāuzlabo?
5. Kas pieņem lēmumu un finansē mācības?
6. Kā tiks izvērtēta un novērtēta mācību efektivitāte?
7. Kas ir mācību dalībnieki, kāda ir viņu pieredze? (Pallo, 2003.)

Valodu apguvē vajadzību izpēti var izmantot dažādiem mērķiem:

- lai noskaidrotu, kādas valodas prasmes valodas apguvējam ir nepieciešamas konkrētās lomas pildīšanai;
- lai izvērtētu, vai esošais studiju kurss atbilst potenciālo studentu vajadzībām;
- lai noteiktu, kuriem studentiem nepieciešams veltīt pastiprinātu uzmanību kādas konkrētas valodas prasmes attīstībai;
- lai konstatētu virzības maiņu, ko izjūt grupas studenti;
- lai apzinātu atšķirību starp to, ko studenti spēj izdarīt un to, kas viņiem jādara;
- lai iegūtu informāciju par to, kas studentiem rada problēmas (Richards, 2001.)

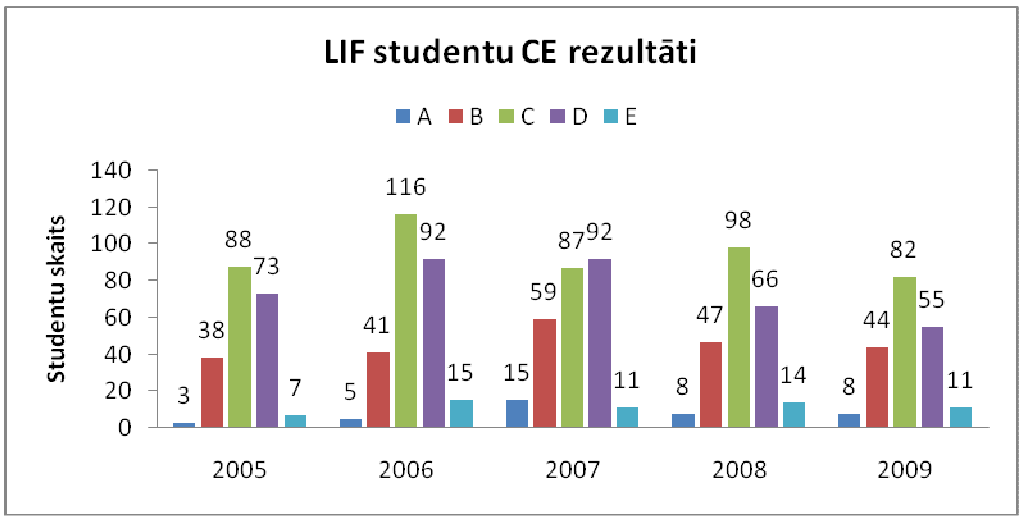
Plānojot profesionālās angļu valodas studiju kursu, ir nepieciešams noskaidrot, kādas ir studentu vajadzības, kas saistītas gan ar valodas apguvi, gan ar studiju kursa saturu. Atbilstoši R. R. Džordana (Jordan, 1997.) izstrādātajam modelim, lai noskaidrotu, kas tieši studentiem ir vajadzīgs un ko viņi sagaida no studiju kursa vērā tiek ņemts:

1) studenta pašreizējās subjektīvās vajadzības, vēlmes, stiprās un vājās puses, intereses, kas patīk/ nepatīk;
2) potenciālā vai esošā darba devēja prasības, vēlmes, ieteikumi;
3) vēlamais galarezultāts – zināšanas un valodas prasmes kursu beidzot;
4) kursa plānotāja un docētāja mērķi, metodikas un stratēģiju izpēte.

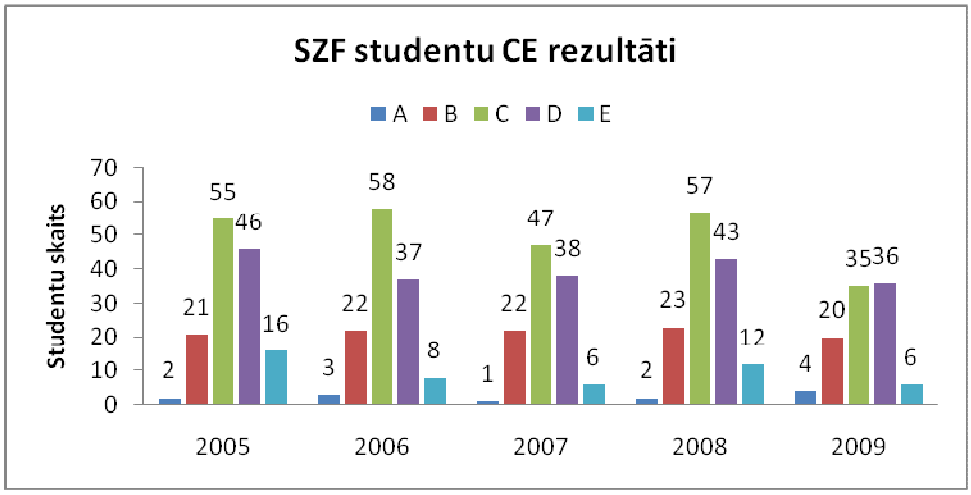
Šeit atklājas arī dažādas pieejas, kas ietilpst studentu vajadzību izpētē:

1) students un docētājs – uz mācībām un valodas apguvēju centrēta, uz procesu orientēta pieeja;
2) darba devējs un vēlamais galarezultāts – uz mērķi centrēta, uz rezultātu orientēta pieeja.

Lai novērtētu LLU studentu vispārējo angļu valodas zināšanu līmeni, uzsākot studijas šajā augstskolā, tika apkopota LLU Uzņemšanas komisijā pieejamā informācija par LIF un SZF pilna laika pamatstudiju programmās no 2005. gada līdz 2009. gadam imatrikulēto studentu rezultātiem valsts centralizētajā svešvalodas eksāmenā (CE) (sk. 1.1. un 1.2. attēlus). Piecu gadu laikā abās fakultātēs uzņemto studentu svešvalodas zināšanu līmenis atbilstoši svešvalodas CE rezultātiem saglabājas ļoti līdzīgs. Dominējošais ir to studentu skaits, kas CE svešvalodā nokārtojuši uz ‘C’, ko saņēmuši 35% – 45%, un ‘D’, ko saņēmuši 27% – 35% no kopējā fakultātē uzņemto studentu skaita. Svešvalodas CE uz ‘B’ nokārtojuši 15% – 22%, uz ‘E’ – 3% – 12% studentu. Vismazāk – 1% līdz 6% – ir studentu, kuru svešvalodas zināšanas atbilstoši CE rezultātiem ir novērtētas ar ‘A’.



1.1. attēls. **LIF studentu CE rezultāti laika posmā no 2005. līdz 2009. gadam** (pēc LLU Uzņemšanas komisijas pārrunu protokolu datiem)



1.2. attēls. **SZF studentu CE rezultāti laika posmā no 2005. līdz 2009. gadam** (pēc LLU Uzņemšanas komisijas pārrunu protokolu datiem)

Salīdzinot divās LLU fakultāšu pilna laika pamatstudiju programmās imatrikulēto studentu un visas Latvijas vidējās izglītības iestādes beidzēju svešvalodas CE rezultātus laika periodā no 2005. līdz 2009. gadam, redzams, ka lielākās atšķirības vērojamas divu – C un E līmeņu īpatsvarā. Visā Latvijā kopumā angļu valodas CE atbilstoši C līmenim nokārtojuši 26,71% - 30,52%, kamēr LLU LIF pilna laika pamatstudijās imatrikulēto studentu vidū C līmeni saņēmušo īpatsvars veido 33% - 43%, bet LLU SZF pilna laika pamatstudiju programmās uzņemto – 35% - 45% no kopējā imatrikulēto studentu skaita. Angļu valodas CE atbilstoši E līmenim piecu gadu laikā nokārtojuši 12,32% - 21,45% Latvijas jauniešu, turpretī LLU LIF un SZF pilna laika pamatstudiju programmās

uzņemto studentu vidū E līmeņu īpatsvars ir 3% - 6% no LIF un 5% - 12% no SZF kopējā pilna laika pamatstudiju programmās imatrikulēto studentu skaita.

Lai noskaidrotu studentu viedokli par profesionālās angļu valodas studiju kursu LLU un to, kas ir jāiekļauj kursa saturā, tika aptaujāti 150 LLU LIF un SZF dažādās pilna laika pamatstudiju programmās studējošie. Lai novērtētu, vai profesionālās angļu valodas studiju kursa saturs atbilst bijušo LLU studentu profesionālajā darbībā nepieciešamajām zināšanām un prasmēm, kā arī, lai noskaidrotu, kādas angļu valodas zināšanas ir nozīmīgas un kādas valodas prasmes ir vajadzīgas viņu profesionālajā darbībā, tika aptaujāti 100 LLU/ LLA absolventi. Lai uzzinātu darba devēju viedokli par studiju kursu atbilstību LLU studējošo vajadzībām un darba tirgus prasībām, kā arī to, kas ir jāiekļauj profesionālās angļu valodas studiju kursa saturā, lai tas atbilstu esošo un potenciālo darba devēju prasībām, tika aptaujāti vairāku uzņēmumu vadītāji un organizāciju pārstāvji.

85% no kopējā aptaujāto LLU studentu skaita un 99% no aptaujāto LLU/ LLA absolventu skaita uzskata, ka LLU studentiem ir jāapgūst angļu valoda. Aptaujātie darba devēji atzina, ka LLU studentiem ir obligāti jāapgūst angļu valoda un vēl vismaz viena svešvaloda (vācu vai krievu).

59% no kopējā aptaujāto LLU studentu skaita un 83% no aptaujāto LLU/LLA absolventu skaita uzskata, ka viņu studiju programmās paredzētais laiks angļu valodas apguvei ir nepietiekams.

53% no kopējā aptaujāto LLU studentu skaita un 77% no aptaujāto LLU/ LLA absolventu skaita uzskata, ka studentiem LLU ir jābūt iespējai apgūt un papildināt savas zināšanas angļu valodā visu studiju laiku vai 3 – 4 studiju gadus. Aptaujātie darba devēji uzskata, ka LLU studentiem būtu jānodrošina iespēja apgūt vienu vai vairākas svešvalodas visu studiju laiku, piesaistot vieslektorus no citām valstīm, integrējot studiju kursus, docējot atsevišķus kursus angļu valodā.

55% no kopējā aptaujāto LLU studentu skaita un 50% no aptaujāto LLU/ LLA absolventu skaita uzskata, ka profesionālās angļu valodas studiju kurss ir bijis noderīgs viņu angļu valodas zināšanu un prasmju apguvei un pilnveidei.

78% no kopējā aptaujāto LLU studentu skaita un 56% no aptaujāto LLU/ LLA absolventu skaita uzskata, ka profesionālās angļu valodas studiju kurss ir/ būs noderīgs viņu profesionālajai darbībai.

Visi aptaujātie darba devēji atzina, ka svešvalodu (angļu, vācu, krievu) zināšanas mūsdienās ir viens no nozīmīgākajiem konkurētspējas faktoriem darba tirgū. Labas svešvalodu zināšanas mūsdienās ir nepieciešamas it visur – sazinoties un sadarbojoties ar ārvalstu partneriem, piegādātājiem, klientiem, iegūstot informāciju, sekojot līdzi nozares attīstībai, piedaloties konferencēs un semināros utt.

Vērtējot dažādus valodas apguves aspektus, valodas zināšanas, prasmes un funkcijas, kuras nepieciešams apgūt, studējot profesionālo angļu valodu LLU, LLU studenti, absolventi un

aptaujātie darba devēji, kā nozīmīgākos bija izvēlējušies atbilžu variantus, kas attiecas uz četriem valodas apguves aspektiem – vispārīgo angļu valodu, lietišķo angļu valodu, akadēmisko angļu valodu un nozares terminoloģijas apguvi.

Balstoties uz teorētiskās literatūras analīzi, analizējot studentu vajadzības un ņemot vērā savu pedagoģiskās darbības pieredzi, pētījuma autore ir nonākusi pie secinājuma, ka, pilnveidojot profesionālās angļu valodas studiju kursa saturu atbilstoši LLU studentu vajadzībām un īstenojot profesionālās angļu valodas studiju kursa mērķi, profesionālās angļu valodas studiju kursa saturā ir jāiekļauj:

1) vispārīgās angļu valodas zināšanu un prasmju pilnveidi;
2) akadēmiskās/ zinātniskās angļu valodas pamatu apguvi;
3) lietišķās angļu valodas prasmju apguvi un pilnveidi;
4) nozares terminoloģijas un ar specialitāti saistītu angļu valodas zināšanu un prasmju apguvi.

Nepieciešamība profesionālās angļu valodas studiju kursa saturā iekļaut **vispārīgās angļu valodas zināšanu un prasmju pilnveidi** izriet no LLU studentu vispārīgās angļu valodas zināšanu līmeņa, uzsākot studijas LLU. Par studentu vispārīgās angļu valodas zināšanām un prasmēm var spriest pēc angļu valodas centralizētā eksāmena rezultātiem.

Lai pilnveidotu LLU studentu vispārīgās angļu valodas zināšanas un prasmes, profesionālās angļu valodas studiju kursa saturā ir jāiekļauj: lasīšanas, klausīšanās, sarunvalodas un rakstīšanas prasmju pilnveidošana, lai studenti saprastu pamatdomu, atrastu/ uztvertu vajadzīgo informāciju, izprastu viedokļus, faktus, argumentus u.c., kā arī spētu formulēt viedokli un piedalīties sarunās un diskusijās; gramatikas tēmu atkārtošana; sadzīvei, ikdienas situācijām, ar vaļaspriekiem saistītas, ceļošanai noderīgas sarunvalodas apguve un pilnveide; ar ikdienas dzīvi un studijām saistītu, sabiedrībā aktuālu tēmu apspriešana u.c.

Akadēmiskās/ zinātniskās angļu valodas integrācija profesionālās angļu valodas studiju kursa saturā izriet no augstskolas akadēmiskās vides, no studiju procesā nepieciešamo un akadēmiskai darbībai vajadzīgo valodas kompetenču apguves un pilnveides. Tās ir: publiskās uzstāšanās sagatavošana; prezentāciju veidošana un prezentēšana; sava viedokļa izteikšana un aizstāvēšana; definēšanas, klasificēšanas, argumentēšanas, novērtēšanas prasmju veidošana un pilnveidošana; zinātniska raksta, referāta rakstīšana un noformēšana; kopsavilkuma veidošana, anotācijas rakstīšana; zinātniska satura tekstu lasīšana u.c.

Nepieciešamība profesionālās angļu valodas studiju kursa saturā iekļaut **lietišķās/ darījumu/ biznesa angļu valodas zināšanu un prasmju apguvi un pilnveidi** izriet no akadēmiskās un profesionālās darbības lietišķā rakstura. Attīstot un pilnveidojot studentu lietišķās angļu valodas zināšanas, prasmes un kompetences, uzsvars ir jāliek uz: lietišķai saziņai (iepazīšanās, tikšanās, diskusijas, pārrunas, intervijas, telefonsarunas u.c.) nepieciešamās sarunvalodas apguvi; lietišķās sarakstes pamatu apgūšanu; lietišķo dokumentu rakstīšanu, dažādu veidlapu, formu aizpildīšanu u.c.

Profesionālās angļu valodas studiju kursā nozīmīga ir profesionālajai darbībai nepieciešamās **nozares terminoloģijas apguve**, lai to apgūtu un pilnveidotu, studiju kursa saturā ir jāiekļauj: vārdu krājuma palielināšana, apgūstot nozares terminoloģiju; ar specialitāti saistītu zinātnisku tekstu, rakstu un publikāciju lasīšana (un tulkošana), nepieciešamās informācijas atrašana tekstā; ziņojumu un referātu veidošana par profesionāliem tematiem u.c.

Atkarībā no studiju programmas un konkrētās studentu grupas zināšanām, interesēm un vajadzībām šos četrus valodas apguves aspektus profesionālās angļu valodas studiju kursā iespējams variēt, to apguves apjomu paplašinot vai sašaurinot.

Lai sasniegtu profesionālās angļu valodas studiju kursam izvirzīto mērķi, kas ir kopīgs visām LLU fakultātēm un bakalaura studiju programmām, kuru studiju plānos ir paredzēta angļu valodas apguve, ir nepieciešams turpināt darbu pie konkrētu valodas zināšanu, prasmju un kompetenču aprakstu izstrādes, lai tas atbilstu studiju programmai un profesionālās angļu valodas apguvei paredzētajam apjomam.

Izmantotās literatūras avotu saraksts

1. Broks A. (2000). Izglītības sistemoloģija. Rīga: RaKa.
2. Harding K. (2007). English for Specific Purposes. Oxford: Oxford University Press.
3. Inne R. (1996). Skolvadības teorētiskie pamati. No: Inne R., Gailīte I., Lūse I., Zīds O. (1996). Skolvadība – idejas, versijas, pieredze. Rīga: RaKa, 7. – 96. lpp.
4. Jordan R.R. (1997). English for Academic Purposes. Cambridge: Cambridge University Press.
5. Latvijas Lauksaimniecības universitātes 2009. gada publiskais pārskats. (2010). Jelgava: LLU.
6. Lūka I. (2008). Profesionālās angļu valodas kompetences veidošanās augstskolā. Rīga: Turība.
7. Pallo S. (2003). Mācību programmu plānošana un novērtēšana. No: Latvijas Pieaugušo izglītības apvienība. (2003). KomPas. Rokasgrāmata pieaugušo izglītības pasniedzējiem. Rīga: SIA Artekoms, 91. – 105. lpp.
8. Prets D. (2000). Izglītības programmu pilnveide. Pedagoga rokasgrāmata. Rīga: Zvaigzne ABC.
9. Richards J.C. (2001). Curriculum Development in Language Teaching. Cambridge: Cambridge University Press.
10. Widdowson H.G. (1986). Explorations in Applied Linguistics 2. Oxford: Oxford University Press.

STUDENT CONFERENCES AS MEANS FOR DEVELOPING ACADEMIC SKILLS IN FOREIGN LANGUAGES

STUDENTU KONFERENCES KĀ LĪDZEKLIS AKADĒMISKO PRASMJU PILNVEIDEI SVEŠVALODĀS

Larisa Maļinovska, Dr.paed., Latvia University of Agriculture, Liela street 2, larisama@apollo.lv, +371 29378511
Anete Mežote, Mg.edu., Latvia University of Agriculture, Liela street 2, anetemezote@inbox.lv, +371 29537374
Inese Ozola, Dr. philol., Latvia University of Agriculture, Liela street 2, inozo@inbox.lv, +371 29665289

Abstract. The aim of the research is to find out how participation of students in international scientific conferences influences the development of their academic skills in foreign languages. The use of foreign languages in the academic study and research has increased in recent years. At the Latvia University of Agriculture in co-operation with three faculties – the Faculty of Social Sciences, the Faculty of Engineering and the Forest Faculty such conferences have been organized already for six years. The students of all other faculties of the university are also participating with their reports and publications. Student conferences being extra-curriculum activities form the environment where foreign languages play an important role being not only the languages of the contributions but also they are used in the process of communication among the conference participants from different countries. An enquiry among the participants of the conference is presented and the results are analysed.
Key words: academic skills in foreign languages, EAP, extra-curriculum activities

Introduction

With the development of student mobility, student involvement in research activities, their participation in international conferences, the demand for skills necessary for academic environment has increased in recent years. Different studies on foreign language use for academic purposes define new goals for language education at the tertiary level, requiring focusing on foreign language skills significant for research genres. *Foreign languages for academic purposes* prepare students for the specific academic requirements for higher education. English as the language of international exchange usually aims not only to improve the students' level of English, but also to develop useful academic study skills and introduce students to the language skills necessary for academic environment.

The researchers (Dudley-Evans, St.John, Flowerdew, Jordan, Gillet, Wray) consider that English for Academic Purposes (EAP) involves teaching students to use language appropriately for study at the tertiary level. It is a branch of ESP (English for Specific Purposes) which has recently expanded together with the growing number of international students undertaking tertiary studies in English and with increasing participation of students in various international graduate schools, student mobility and student international scientific conferences.

As EAP has the broad aim of helping learners to study or research in English, it refers to a wide range of academic activities including (Gillet, Wray, 2006): 1) pre-university, undergraduate and postgraduate teaching (from materials design to lectures and classroom activities), 2) classroom interactions (tutorials, feedback, seminar discussions etc.), 3) research genres (journal articles, conference papers, grant proposals etc.), 4) student writing (assignments, exams, dissertations etc.). Dudley and Johns (1998:41) name two divisions of EAP: English for General Academic purposes (EGAP) and English for Specific Academic purposes (ESAP). The first type refers to the skills associated with study activities, for example, reading research articles, listening to lectures, taking notes, writing abstracts, time management, etc. The second type integrates general academic skills in foreign languages with the actual subject tasks involving cooperation with the actual subject department.

As regards the situation of EAP in the Latvia University of Agriculture, the subject courses are taught in Latvian, but *Professional Foreign Language* is taught in the first two years as a separate subject. The conventional approach dominates in teaching *Professional Foreign Language* focusing on acquiring specific terminology in the respective field, translation and developing mainly reading, writing and speaking skills (the focus is on oral presentations). However, in the quickly changing world when foreign languages play an increasingly important role in the world of work, the link should be provided between classroom processes and real-world communication processes. The number of foreign language sessions that are planned in the curriculum is, unfortunately, insufficient for acquisition of all the necessary terms in the chosen discipline and for understanding the material that is delivered in a foreign language.

As regards the situation in the labour market, it is dynamic: new products are launched, production management system, equipment, technological processes etc. change persistently. Therefore, the system of higher education cannot provide an individual with the knowledge necessary during the whole professional life. Universal and sustainable knowledge and skills are significant both for university and for further carrier that will be useful in diverse forms of professional and academic activities in the long-term period. Extra-curriculum activities, i.e., student international scientific conferences, can become one of the means of motivating students to acquire the knowledge and competences necessary for long-life learning and to develop academic foreign language skills.

In scientific literature the term “skills” is used in two levels: there are four macro-skills (some sources suggest five macro-skills, adding the combination of listening and speaking) of writing, speaking, reading and listening, each consisting of a number of micro-skills. The authors of

the paper have developed this idea and, using the list of academic skills worked out by the University of Southampton, formed the list of academic skills relevant for student conferences (Table 1).

Table 1

Academic Foreign Language Skills Relevant for Student Conferences (based on the list of academic skills worked out by the University of Southampton)

Macro-skills	Academic foreign language skills
Speaking	delivering an oral presentation, mastering useful language for oral presentations, speaking without hesitating, checking and clarifying when speaking, recognizing academic register, socializing in informal occasions, communicating politely across cultures, being aware of the effect of culture in communication
Writing	writing conference abstracts, essays, summaries, reports, structuring writing, using examples to support written statements, expressing facts and opinion in writing, describing graphs and tables, interpreting trends and changes in graphs, identifying plagiarism and avoiding poor practice, introduction to quoting and paraphrasing, using quotations, using paraphrase in writing, understanding reference lists and bibliographies
Reading	scanning for specific information, reading to identify main points, classifying information, reading and critical thinking, identifying text types, recognizing fact, opinion and evidence in texts
Listening	listening closely to presentations, focusing on the language in a lecture, listening for markers in the language, listening for and understanding vocabulary of the field, listening for theme words and examples, listening for key points in a science lecture, listening to understand more difficult language

It can be concluded that, on the one hand, it is not possible to master all the necessary skills during contact lessons as the preparation and participation in conferences are very time consuming; on the other hand, extra-curriculum activities can provide an excellent opportunity for motivating students.

Research methods

As the method of research a small scale inquiry was used. The enquiry was performed among Latvian and international students who participated at the student international scientific conference in 2011 organized by the Latvia University of Agriculture. The questionnaire was sent electronically to 120 undergraduate and graduate students, 82 students responded. The questionnaire contained nine questions. The purpose of the inquiry was to find out participants' opinion regarding academic skills in foreign languages necessary for the preparation and successful participation in the conference.

Results and Discussion

In 2011, already the 6th international scientific conference for undergraduate, graduate and postgraduate students "Students on their Way to Science" was organized in co-operation with three faculties – the Faculty of Social Sciences, the Faculty of Engineering and the Forest Faculty. There were 149 participants present from 13 countries – Latvia, Lithuania, France, Germany, Russia, Belarus, Slovakia, Czech Republic, Bulgaria, Greece, Ukraine, the USA and Ireland. The conference was aimed at dissemination of scientific research results, sharing experience, improvement of foreign language skills and cross-cultural competences, and establishment of international contacts. The only possible way to communicate for the contributors among themselves obviously is the English language as they are representing different countries having different languages and being carriers of different cultures. The working languages of the conference were English, French, German and Russian. Nevertheless, there were only a few reports in Russian, two in German and one in the French language; the other reports were delivered in English. It gives an opportunity to analyze the academic competences of the English language that are acquired and mastered at such international conferences.

Analyzing the results of the enquiry, it was possible to get an insight in the importance of participation at international conferences and presentation of reports in foreign languages for the development of academic skills in foreign languages, as well as formation and improvement of other necessary competences.

Almost all of the respondents had delivered reports in the English language before (except for one student). But not all of them had participated at international scientific conferences (50 %). At the university, the students have to make presentations in the foreign language taught at the sessions of foreign languages. It explains the answers of the respondents.

One third of the respondents had difficulties participating at the conference due to the lack of adequate foreign language skills. The rest did not encounter any such difficulties. Today students are motivated to acquire foreign languages as they have many opportunities to use them in their professional sphere as well as in everyday life.

As regards the question about the time they spent for preparation and participation at the conference, the answers of the respondents differed; there were students who did not consider this activity to be time consuming (two thirds of the respondents), the others think that it took much time. The respondents ranked the following tasks according to the time consumed for the particular task to be completed:

1. Collection and selection of information
2. Formatting the presentation
3. Writing the report
4. Training for the presentation
5. Learning of the text for presentation in a foreign language.

The question about the promotion of the acquisition of the foreign language (see Figure 1) through participation at international scientific conferences was answered quite unanimously.

Acquisition of foreign language skills at the conference

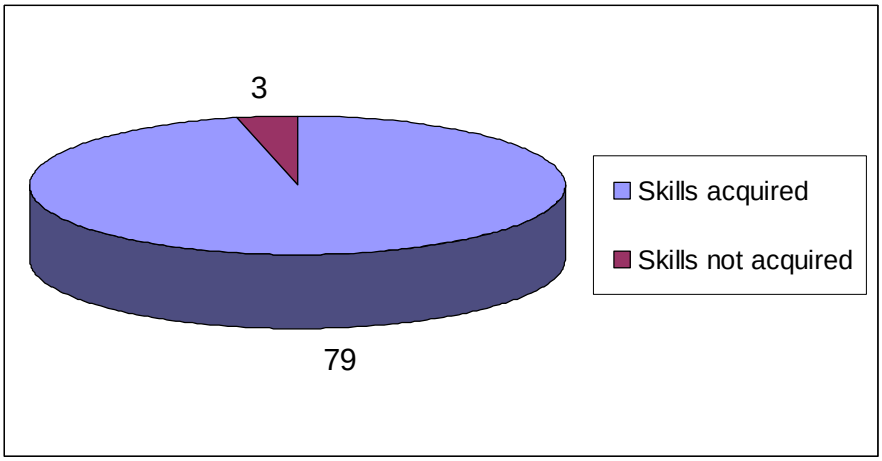


Figure 1. Acquisition of foreign language skills at the conference

The respondents agree that pertaining to all of the above mentioned activities they apply the macro-skills of reading, writing and speaking in the foreign language in which the report is to be prepared. At the conference, the students deliver their reports, and during the work at the sections

they also listen to the reports of their peers. Thus participants consider that mostly the macro-skills of speaking and listening skills have been acquired during the conference (see Figure 2).

Asked about the skills that can be acquired through participation at such international conferences, the respondents mentioned cross-cultural communication skills in the first place, and then presentation skills and skills for writing the report and the abstract followed.

Ranking of the macro-skills of the academic language acquired at the conference

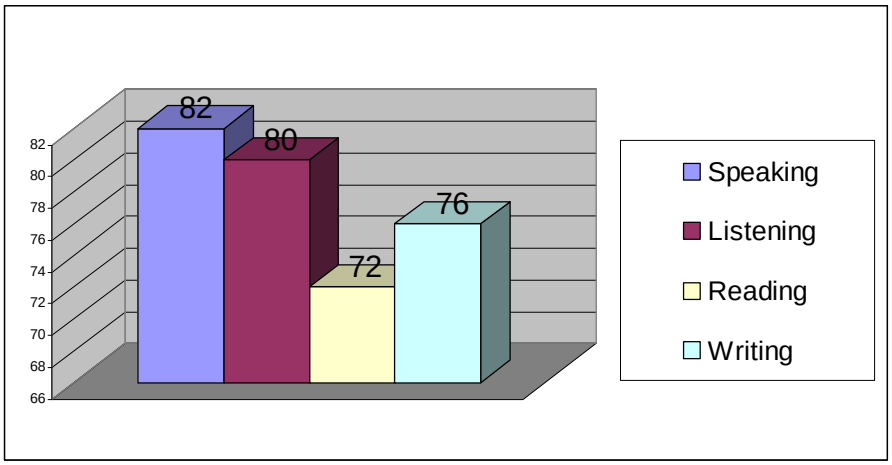


Figure 2. Ranking of the macro-skills of the academic language acquired at the conference

The last question in the enquiry form was whether non-formal communication with foreign students outside the work in the sections promotes mastering of the foreign language. All the respondents (100%) answered this question positively. Usually the first meeting with the foreign students that have come to Latvia for many of our students is already on the previous day. After the plenary session, there is a coffee break during which our students can meet their friends made at the previous conferences and get acquainted with the newcomers. Our students, who are in the steering committee of the conference, are acting like guides for the foreigners; they bring them to the Palace museum and show them the palace. In the evening, everybody after the day's work can communicate in foreign languages at the get-together party. On the next day, the students can go on an excursion and train their skills not only in foreign languages, but also in cross-cultural communication.

The choice to use a foreign language as a working language of student conferences increases their popularity among students, as they have an opportunity to apply their knowledge in international environment and see what level their foreign language competences are in comparison to students from other countries. Such opportunity allows displaying of academic skills in foreign

languages on the professional level. Possession of academic skills in foreign languages will be helpful for the future specialists to integrate in the labour market after graduation from the university and to make a career in their professional life.

Conclusions

1. All of the students have had presentations in foreign languages, but only a half of the respondents have participated at international conferences.
2. Due to the motivation to learn foreign languages, the skills of the students are to a large extent developed.
3. Collection and selection of information, and formatting the presentation are considered, by the respondents, to be the most time consuming tasks in preparation for the conference.
4. Almost all of the students confirmed that participation at international scientific conferences promotes the development of academic skills in foreign languages.
5. The ranking of the macro-skills of foreign languages improved at the conference is as follows: speaking, listening, reading, and writing.
6. Among the other skills that are mastered at international scientific conferences, cross-cultural communication skills are mentioned by all respondents.
7. Summarizing the answers of the respondents, it can be concluded that international scientific conferences are extra-curriculum activities promoting development of academic foreign language skills of the participants.

References

1. Dudley-Evans T., St.John M.J. (1998) Developments in English for Specific Purposes. A Multi-disciplinary Approach. Cambridge University Press
2. Flowerdew, J. (1994) Academic Listening. Research Perspectives. Cambridge University Press
3. Gillett, A.,Wray, L (2006) EAP and Success in Assessing the Effectiveness of EAP Programmes. BALEAP
4. Jordan, R.R. (1997) English for Academic Purposes. A Guide an A Resource Book for Teachers. Cambridge University Press
5. English for Academic Purposes Toolkit – list of contents. (2011) University of Southampton. http://www.elanguages.ac.uk/activities.html, accessed 30.06.2011

Appendix 1.

The questions of the enquiry were as follows:

1. Had you delivered a report in a foreign language before?
2. Had you participated at an international scientific conference before? Where, when, how many times?
3. Did the lack of foreign language skills serve as an obstacle in participating at the conference?
4. Did the preparation for the presentation take much of your time?

5. What was the most time consuming?
   Collection and selection of information
   Writing the report
   Making the presentation
   Learning the text for presentation in a foreign language
   Training for presentation
   Other. What?
6. Did the conference in general promote acquisition of the foreign language skills?
7. What language macro-skills did you acquire most?
   Reading
   Writing
   Speaking
   Listening
8. Did you acquire also some other of the mentioned skills?
   Presentation skills
   Report writing skills
   Cross-cultural communication skills
   Other. What?
9. Did non-formal communication with foreign students apart from the work in sections promote mastering of the foreign language skills?

DEVELOPMENT OF PROJECT MANAGEMENT AND IT COMPETENCES THROUGH INTEGRATED LEARNING

Taavi Tamberg, Corresponding author – Assistant of information systems, Pärnu College, University of Tartu – Ringi 35 80010 Pärnu, Estonia Tel +372 44 505 36 e-mail taavi.tamberg@ut.ee

Reet Soosaar - Lecturer of English, Pärnu College, University of Tartu – Ringi 35 80010 Pärnu,
Estonia Tel +372 44 50 544 e-mail reet.soosaar@ut.ee

Arvi Kuura - Senior Lecturer of Entrepreneurship, Pärnu College, University of Tartu – Ringi
35 80010 Pärnu, Estonia Tel +372 52 87 321 e-mail arvi.kuura@ut.ee

Sulev Alajõe - Manager of Department of Development, Pärnu College, University of Tartu – Ringi 35 80010 Pärnu, Estonia Tel +372 44 505 35 e-mail sulev.alajoe@ut.ee

Abstract. The present paper aims to explore the possibilities for the development of project management and IT competences through integrated learning. We examine the essence of IT skills, such as communication, time management, information handling, office and productivity tools, as well as project-specific tools etc., in correspondence with project management competences stated in IPMA International Competence Baseline.
We are going to show that there are several possibilities where obtaining IT-competences can support learning project management competences and vice versa. We assume that learning these competences separately is probably less effective than in combination. Our methodical approach is based on the constructivist learning paradigm. This paper also discusses language-related issues, mainly focusing on the necessity for cooperation on a course design and language learning.
The actuality of the topic is particularly emanating from a shift of contemporary paradigm in education – the efficiency of learning and teaching, the motivation of students (especially adult learners in part-time studies) and the decreasing share of contact hours are creating problems almost everywhere in educational institutions. Thus the integration of subjects and courses (including "modulization") is becoming more and more important.

Introduction

The main goal of this paper is to combine project management competences with IT skills. The actuality of the topic is particularly emanating from a shift of contemporary paradigm in education – the efficiency of learning and teaching, the motivation of students and the decreasing share of contact hours are creating problems almost everywhere in educational institutions. Thus, the integration of subjects and courses is becoming more and more important and our research is analyzing the possible overlap in project management, IT and language subjects to create qualitative innovation in this area.

Our methodical approach is based on the constructivist learning paradigm. Learning is considered as an active process in which learners construct new knowledge based upon their prior knowledge. The constructivist perspective clearly diverges from the objectivist model of learning which presumes that knowledge can be put directly into the learner's head.

Definition of IT Skills

To clarify the overall meaning of IT skills we are focusing on skills needed not for IT specialists, but for ordinary, mostly business and office workers. So there will be neither discussion of IT administration and problem solving, helpdesk as described for example in EUCIP Professional Profiles (EUCIP 2011), nor discussion of specific skills needed in IT project management. Computer literacy can be defined as "having a basic understanding of what a computer is and how it can be used as a resource" (Nichols 1998 by Csapo 2002). Some universities in the United States are now requiring students to demonstrate computer literacy before graduation by taking a computer literacy exit exam. In the educational process, the high school business curriculum can best provide for computer literacy in preparing students for the global work environment. (Csapo 2002)

The best way is to take the European Computer Driving Licence (ECDL) program, introduced by CEPIS in 1995 and currently governed by the ECDL Foundation (ECDL History 2011) as a basis. The ECDL certificate proves that its recipient possesses some basic skills in using a computer and internet in main office situations. One advantage for the ECDL (ICDL in US) compared to other training and certification programs is that the ICDL is vendor-neutral and can be adapted to users of most major commercial software applications (Csapo 2002). The ECDL syllabus consists of seven modules (ECDL 2007): 1. Basic concepts of information technology; 2. Using the computer and managing files; 3. Word processing; 4. Spreadsheets; 5. Database; 6. Presentation; 7. Information and communication.

ECDL Foundation has two types of certificates: a START license (called Digital Literacy - obtained after passing the exams of ECDL modules 2, 3 and 7, we call them basic IT skills in this paper) and a FULL license (Called Digital Competence - obtained after passing the exams of all seven ECDL modules).

Calzarossa et al (2005) analyzed the implementation of the programme in Italian universities and found that there is a large variety of choices about what concerns the teaching organization, the credits awarded to the students and the type of ECDL certification required. Universities typically offer multiple ECDL courses because of the large number of students and of their different skills and background. Courses differ in terms of teaching methods, number of ECDL modules and hours taught per module. On average, each university dedicates 49 h to classroom teaching of ECDL modules.

There are additional modules 8-13 in ECDL (ECDL Programmes 2011): 8 - 2D Computer-Aided Design; 9 - Image Editing; 10 - Web Editing; 11 - Health Information Systems Usage; 12 –

IT Security; 13 - Project Planning. We only take Project Planning module from this list in consideration. As a great deal of project manager's work involves working with team members we include special skill areas from time and task management, organizing workloads, overall knowledge about Personnel Management Systems etc which are not included in ECDL module 13 (Project Planning) as specific skills about project planning software.

There are also advanced level modules for ECDL modules 3-6 (ECDL Advanced Syllabus 2008) which are more detailed and we use them to indicate advanced level IT skills in this paper. In this paper we joined ECDL modules 4 and 5 because building own databases is not the ordinary office work any more like it was in 90s, but on the other hand, there are connections to module 5 as project management needs to query some database and analyze the received data in the spreadsheet environment.

Different emphasis can be put on the ICT skill obtaining. As an example for librarians multimedia was taken as a core of ICT (Poulter et al 2004). ANA and TIGER initiatives can help nursing education reform, but they must push institutions to place greater emphasis on information and informatics literacies so students understand that informatics is more than computer skills. (Dixon 2010)

For project manager as a profession there is a need to include some business design issues that are connected to defining business needs for IT services (ITIL 2011) as project manager needs to define project environment (ICB comp. 1.10 Scope&Deliverables, 3.06 Business). It can be seen as needs for higher levels of project manager (ICB levels A and B).

CEPIS, Founder of ECDL, offers a quiz (2011) for different IT specialist professions to discover attender's skill levels thorough ECDL modules and gives a table in the end where achieved levels can be compared with expected levels. For IS Project manager CEPIS suggests core level in ECDL main 7 modules, but advanced level in modules of word processing and spreadsheets . Additionally more special IT skills are described in EUCIP Professional IS Project Manager syllabus (EUCIP 2011) extended even more in European e-Competence Framework (http://www.ecompetences.eu) and Skills Framework for the Information Age (SFIA, http://www.sfia.org.uk) etc.

Similar testing could also be carried out in project management to encourage students to gain more knowledge in certain fields. On the other hand, it leads to an idea that such coherent matrices for IT skills and field competences may be created for any specialty.

Correlation of Project Management Competences and IT skills

We evaluated ICB competences and indicate in each ECDL skill whether it is needed or not and if it is needed, is it needed in basic, core or advanced level. See table in Appendix 1. Project Management competences are defined in IPMA Competence Baseline version 3.0 (ICB, IPMA 2005) divided into three groups – technical (20), behavioural (15) and contextual (11 competences). All the evaluations are made by analyzing ICB competence descriptions, especially in "Possible process steps". Basic level means mostly knowledge about possibilities, as core level means a need to use this skill or knowledge in practice. Advanced level marks a specific need for a skill and tested practice in it.

Basic IT skills are needed actually in any of competences of ICB, but more skills are needed in technical competences. After basic skills we expect (especially in ICB higher levels) PM needs Core level IT knowledge and skills and in some cases there are advanced level skills needed. It is possible to make such a table for different ICB levels as there are certainly differences. And there are special skills that are needed in different types of projects, for example computer-aided design (CAD) systems in construction business etc.

Behavioural competences were analyzed and we found that these high level expectations for the PM, in our point of view, are possible to fulfill when PM feels confident in most IT skills and knowledge areas. Advanced level skills and knowledge are required about communication and security areas, but also in using PM software for monitoring and risk management. PM needs to understand the need for each skill, although he or she does not need to use every skill by him(her)self, for adequately handling every relationship with different team members. Contextual competences were also analyzed and we found that there is no need for IT skills in advanced level except using IT systems and regulations concerning permanent organization. On the other hand, there is a need for every IT skill in the context of information age we are living in and much more, if projects are important part of one organization, PM must understand and be part of developing IT systems in there, but this is another subject to study and learn.

In the end we took maximum indication for each IT skill through the ICB competences and also average importance. From that information it is clear that all 7 main ECDL modules must be obtained in core level for PM and better if most of them are obtained in advanced level. For setting up the best curricula for project management studies we also have the problem that students are in different positions of IT skills, when they start learning PM. There should be some compensative courses for those, who need to learn the basics of IT skills (using computers and files, word processing, communication as stated in ECDL start level). Although nowadays almost everybody

who comes to school is already using computers and hence should know basics, but in fact it is possible to use computers without basic IT skills. For later discussion we presume that all the students starting PM courses have obtained (in previous studies or compensative courses) basic IT skills.

We can conclude that if we expect students come to study PM having basic IT skills (ECDL modules 2, 3 and 7), they must reach core level in all ECDL main modules plus module 13 (Project planning) and some other teamwork skills. In an educational institution it must be defined in the curricula if these skills are obtained on separate courses or with PM competences.

In terms of constructivist learning paradigm on the basis of this table it would be possible to find connections for the subject content in curricula and accordingly guarantee better possibilities for students to achieve the goals of curriculum (and subjects). It would also be possible for the lecturers of specific subjects to find examples and practical tasks coherently with other subjects.

Language-related issues

Optimal combination and balancing of language-specific and content-specific teaching has been an issue of long debates since CLIL (content and language integrated learning) has been identified as a priority by the European Commission.

This new approach, which emerged as a concept in early 1990s, is characterized by language support integrated in subject studies, joint planning between teachers, and specified outcomes for both content and language. All the implications, strategies and techniques of CLIL have been researched and summarised by Coyle et al (2010). CLIL integrates language learning and content learning at cognitive and cultural levels appropriate to the learners resulting in new learning scenarios quite different from regular language or content lessons. Coyle et al (2010) suggest the 4Cs framework (content, communication, cognition, and culture) for understanding CLIL. A recent trend towards competence-based education stresses the importance of seeing competence as integration of knowledge and skills. The development of knowledge and skills are also actively promoted by 4Cs principles.

Application of CLIL principles has challenged teachers who have to reconsider their teaching practices and design purposeful learning activities for students. As motivation is the key theme for language learning, a deeper emphasis should be laid on good task and materials design, on developing students' metacognitive skills how to cooperate effectively in groups, solve problems, discuss, reflect, and discover new meanings. Another major issue arises about assessment – what do we assess – content or language and how? The practitioners have taken the position that

the content should always be the dominant element in terms of objectives and therefore they assume that it is content first and foremost that is being assessed (ibid).

It seems that up to now most of the studies on needs analysis and CLIL at the university are related to implementing this approach for the professional development of the learners. Based on research and surveys the results demonstrate that CLIL programmes are more demanding, but geared to greater achievement (Coyle et al 2010). Mehisto (2008) brings out the difficulties of cross-curricular integration based on research results of CLIL programming in Estonia – especially a lack of knowledge about CLIL-specific strategies emphasising the necessity for improved planning by teachers and government authorities. Mehisto focuses on the need to acknowledge the value of CLIL in education, teacher training, stakeholder responsibilities and professional learning communities and to increase the awareness of the change process in general.

In Pärnu College we recently made some changes in our bachelor-level curriculum „Entrepreneurship and Project Management“. The most significant change was combination of two courses – project management methods and project management software – into one course. The idea of such change was obviously to achieve better integration between content-related issues. We haven't consciously designed any courses integrating content and language learning yet, and our courses probably do not qualify as pure CLIL, but we have worked toward furthering integration of content and language learning in collaboration with the programme managers to generate the integrated curriculum content. We aim to design the courses to improve the students' productive and professional communication skills. As any learner needs a very definite connection between the learning goals and usability, the language learning module of project management for the first-year students involves a one-month „project“ for launching a new product/service on the market (also including marketing and advertising modules). For getting the first idea of project work and to ease collaboration of project teams, students use online Zohoprojects environment which also supports improvement of their relevant IT skills. The majority of the assignments may be defined as „collaborative and on-display assignments“ – they are meaningful, demanding efforts and offering problem-tackling and innovative thinking. The whole course includes a lot of content-based oral presentations with peer assessment and discussion. The evident advantage is the subsequent feedback as the oral presentations in the classroom are recorded and uploaded to the e-learning environment of the course.

References

1. Calzarossa, M. Ciancarini, P., Maresca, P., Mich, L., Scarabottolo, N. 2005. The ECDL programme in
2. Italian Universities, ELSVIER.

3. CEPIS quiz. [http://www.cepis.org/index.jsp?p=640&n=1126] 24.06.2011.
4. Coyle, D., Hood, P., Marsh, D. 2010. Content and Language Integrated Learning. Oxford: Cambridge
5. University Press.
5. Csapo, N. 2002. Certification of Computer Literacy, T H E Journal, 0192592X, Aug 2002, Vol. 30, Issue 1.
6. Dixon, B., Newlon, C.M. 2010. How do future nursing educators perceive informatics? Advancing the nursing
6. informatics agenda through dialogue. ELSVIER.
7. ECDL 2007. European computer driving licence syllabus version 5.0, The ECDL Foundation Ltd.
8. ECDL Advanced Syllabus 2008. The ECDL Foundation Ltd.
9. ECDL History. [http://www.ecdl.org/index.jsp?p=94&n=170] 25.06.2011.
10. ECDL Programmes. [http://www.ecdl.org/programmes/index.jsp?p=102&n=108] 29.06.2011.
11. EUCIP Professions. [http://www.cepis.org/index.jsp?p=1120&n=1122] 25.06.2011.
12. IPMA Competence Baseline Version 3.0. IPMA International Competence Baseline version 3.0 2006.
13. ITIL, Information System Service Management. [http://www.itil-officialsite.com] 28.06.2011.
14. Mehisto, P. 2008. CLIL counterweights: Recognising and decreasing disjuncture in CLIL. International CLIL
15. Research Journal, 1. [http://www.icrj.eu/index.php?vol=11&page=75] 20 June 2011.
16. Poulter, A., McMenemy, D. 2004. Beyond the European Computer Driving Licence: basic and advanced ICT skills for the new library professional, IFLA Journal 2004 30: 37.

MODERN TEACHING OF HOME ECONOMICS AND TECHNOLOGIES IN LATVIA: THEORETICAL AND PRACTICAL ASPECTS

MŪSDIENU MĀJTURĪBAS UN TEHNOLOĢIJU DIDAKTIKA LATVIJĀ: TEORĒTISKIE UN PRAKTISKIE ASPEKTI

Elita Volāne, Dr. paed.,
Riga Teacher Training and Educational Management Academy, School Pedagogic Department, Imantas 7. līnija 1, Riga, LV-1083,
phone 7808133, elita.volane@rpiva.lv

Abstract. In the pedagogical process based on humanitarian education paradigm it is important to promote the development of every student's identity, ensuring its expression in the acquisition of life skills activities. The mission of modern education, including the subject of home economics and technologies, is to assist in acquiring the skills that are required in different areas of life: working, learning, personal and public life.
By acquiring and analyzing home economics and technologies teaching methodology, it can be stated that the founder of handicraft methodology in Latvia, as well as representatives of the didactics offer a variety of approaches based on European folk traditions in the promotion of the students' skills development. Latvian educational classics are to a large extent influenced by European educational traditions and thus blend together well.
The aim of the article is to explore and discover the theoretical basics of the didactics of home economics and technologies and to develop their importance in the process of teaching content acquisition of modern home economics and technologies at the elementary school.
Nowadays, the integrial approach is typical to the organization of the learning process of home economics and technologies. The teacher's ability to associate the teaching content with real life situations, methodological techniques that focus on the activation of students' learning activities, aspects of personality development where mental and physical unity is implemented, and real world mental, emotional and volition harmony developed.
Key words: Home Economics and Technologies, didactics, teaching methodology.

Introduction

Changes in modern society and economy rely on new requirements for modern, high quality and competitive education highlighted to the education system. It has been confirmed by the continuing quest for the last twenty years in the education system in Latvia.

Today's educational goals, according to I.M.Rubana, choose active cognition-enhancing teaching methods, work organization forms, developing learning skills: finding the information one needs, using different sources of information, memorizing, thinking, judging, and deciding, organizing oneself to work. A person possessing such skills, at any time, will be able to obtain the necessary information and use it in one's professional, social and private life (Rubana, 2000).

Rapid scientific and technical progress, including information technologies affects the learning process of Home Economics and Technologies teaching content, where it is important to help with the acquisition of skills required in different areas of life.

The use of up-to-date handicraft learning content is determined by several factors:

• Changes in the curriculum of Home Economics and Technologies.

• Changes in the target of the subject, which requires every student to learn the skills to plan and organize personal housekeeping independently, to gain an understanding of human habitat conditions and opportunities to improve them.

• Indications in the new subject standard that 25% of the curriculum has to be acquired theoretically (Regulations in the National Standard of Elementary Education and Elementary Education Teaching Standards, 2006).

Practice proves that there is a discrepancy between the existing curriculum of Home Economics and Technologies and its implementation at school, due to inadequate implementation of the curriculum in accordance with the requirements of the standard.

Research objective: to explore and discover theoretical basics of didactics of Home Economics and Technologies, and escalate their significance in the process of acquisition of modern Home Economics and Technologies teaching content at elementary school.

Research methods

Study methods: a theoretical method - scientific and methodical literature analysis, empirical methods - practical experience analysis.

Results and Discussion

Historical experience shows that the name of "Home Economics and Technologies" (handicrafts, household, housekeeping (handicrafts), housekeeping) has been changed as a result of different school reforms. The original literature offers the term - teaching methodology, only in the last few years it is called didactics, therefore there is a need for further clarification. The didactics, according to I.Žogla, represents a very complex area of human activity. It is a unifying concept, which covers the mutual need of teaching and learning, and, in this context, dependence and conditionality relationship of two more people in a specific targeted interaction (I.Žogla, 2001, 5).

Pedagogical terms glossary defines didactics as a science of education and training. It is an educational sector, which studies general patterns of the learning process independently to specific features of a subject. Specific features are studied by subjects teaching methodologies. Didactics generalizes specific experiences of methodologies, but methodologies, in their turn, use generalized insights and recommendations of didactics (Pedagogical Terms Glossary, 2000, 71).

The goal of "Home Economics and Technologies" subject in the standard is to develop a student's awareness, skills of human habitat's safety, quality conditions and their improvement opportunities, to promote a student's practical action and social cooperation skills development, so

that everyone is able **to plan and organize personal housekeeping** independently, comply with safety conditions, handle extreme situations adequately and engage competently in the implementation of a technological process (Regulations in the National Standard of Elementary Education and Elementary Education Teaching Standards, 2006). Thus, curriculum of Home Economics and Technologies is the totality of knowledge, practices and attitudes that students learn to develop their intellectual, emotional, volition scope, improve their labour skills and habits (Volāne, 1997, 9). Therefore, there is a need to cognize theoretical basics of didactics, its methods, teaching techniques and work organization forms in the curriculum acquisition process.

A variety of opinions on skills building methods can be found in literature. Only in the 1970s they started searching for methods of labour skills development in science. A. Ļubļinska affirms the skills are formed *as a result of such exercises*, where skills formation conditions are built, that is, one can periodically compare the obtained results with the standard, be aware of errors and try to correct them (Ļubļinska, 1979). As demonstrated in the references, handicraft training from form one contains such types of tasks where one can realize not only skills formation conditions developed by A.Ļubļinska, but also V.Zelmenis' cognition that children's elementary skills are developed *as a result of experience and imitation* (Zelmenis, 1991, 64).

Here is the place for **perception, observation, collation and movement coordination.** In particular, it is possible to realize it at the elementary school handicrafts training because the curriculum includes such topics as composition, working with natural materials.

In theory skills are defined as a type of activity and operations. Precondition of action is the ability to perform any activity in accordance with required quality and quantity. V.Zelmenis states that a skill is such a level of knowledge and techniques that allows one to use knowledge in targeted actions (Zelmenis, 2000, 64). In her turn, I.Žogla believes that skills are a capacity to act based on knowledge, in order to achieve the goal under certain conditions, by selecting a suitable form (Žogla, 2001, 224). In this case, one understands the skills as an activity fragment for the achievement of the objective, where the knowledge and skills are inseparable.

Nowadays, Home Economics and Technologies curriculum is related to the acquisition of **function of life** *skills,* that is, to the ability to decide on the target and operate on the basis of knowledge and attitudes.

Studying the origin of handicrafts teaching methodology, it must be recognized that it is based on profound and significant roots. It relates to K.Cīrulis, who while working as a tutor of St. Petersburg Teachers Training Institute, doing research work on handicraft study in Western European countries and Northern Europe, Switzerland, Germany and Denmark, complements to his

theoretical knowledge and experience with the latest pedagogical knowledge. K.Cīrulis' practical activity is also important in organizing and conducting the first extensive courses for teacher preparation. The main audience, according to E.Pētersons, was Latvian and Estonian teachers (Pētersons, 1931, 89).

In the coming years, M. and R. Bīlmaņi work out pedagogical basics of composition, where one can find methodical comments and guidance, that composition up to the age of 13 and 14 is considered as a learning tool for all subjects and not as a separate subject. The authors point out that during the first school years composition is considered as a game that promotes a child's imagination and capacity development (Bīlmaņi, 1920, 7). The authors' methodical recommendations for teachers include pedagogical cognitions on *the correspondence* of composition works *to the child's age*, its correlation to extensive brain centres and, being based on the child's tactile sense, provide it with the most complete impression (Bīlmaņi, 1920, 8-12).

M. Bīlmane's paperwork methodology is equally important, discovering not only different ways to learn the skills to cut with scissors, but also methodical recommendations for basic skills and notions acquisition in other subjects in the first years of elementary school (Bīlmane, 1924).

I must say that M. Bīlmane's methodical recommendations were used while working on a training set "Practical Mathematics" for form 1 where students simultaneously learn different skills in mathematics, handicraft technology, seeing things in context (Krastiņa, Limanoviča, Drelinga, Volāne, 2008, Limanoviča, Krastiņa, Volāne, 2008). Variation of methods, techniques, as well as observance of *a step-by-step approach*, and acquisition of a new training technique by seeing things in context, enriches a student, enabling new capabilities of one's intellectual development.

M. Bīlmane's methodical recommendations provide with many opportunities for students to acquire a variety of skills not only in the subject of Home Economics and Technologies but in the learning process in general. On the basis of the relevance of the problem and M. Bīlmane's recommendations "Scissors Cuts", we offer the possibility to use scissors cuts nowadays as well, for students' development and various skills acquisition (Volāne, 2010).

Regarding observance of students' *interests* V.Miezītis' methodical recommendations for boys' practical work are important, selecting a simple technique (Miezītis, 1925). The author recommends to use wood as a source material, a knife as a tool, stating that the work does not require special facilities. Therefore, nowadays it is also recommended to offer wood curving or cutting a shape from pine bark for boys' practical activities at elementary school.

With regard to girls' handicraft technologies E.Fārta has developed recommendations to teachers on how to realize *the principle of individualization and differentiation*, planned for more capable girls who do the work faster than scheduled in the curriculum (Fārta, 1927, 37).

R.Zeidels' cognition has great benefit in the handicraft teaching development that handicraft and related movements, senses are not only the source of information, but there is a harmonious education and upbringing foundation, and that *visuality* is an important part of learning handicraft (Zeidels, 1926, 8). Many author's ideas have proven their significance over the years, being relevant even today. R. Zeidels admits that crafts are an experimental subject; it is a theory test for some theoretical training, which offers definite basis and interest (Zeidels, 1926, 18).

Nowadays, there is a major recommendation of A.Panteļējevs that in handicraft children do not need to be taught exclusively to prepare products by setting it as the ultimate objective of their handiwork, but to educate them *to* work and *by means of* work. A.Panteļejevs emphasizes that the most important task is the formation of tidiness habits (Panteļejevs, 1936). When adjusting the boys' drawings of forms 2 and 3, there is a recommendation not to require the drawing to be exact because fine fingers musculature is not well enough and strongly developed. According to the students practical work results, one judges on each individual student's abilities. Nowadays there is a topical A. Panteļejevs' cognition that practical work is also a major subject requiring for a teacher's high energy and interest. A proposed suggestion in the curriculum *for the facilitation of self-control, self-analysis* requires additional energy from a teacher (Panteļejevs, 1936).

According to A.Panteļejevs, labour skills development process, work results are important, as well as the cognition of work carried out well (Panteļejevs, 1936, 3). Not only independent work is relevant, but also the ability to use the knowledge and skills obtained in other subjects. There is a significant recommendation to focus on the skill of making products that are by design and importance similar to those already made, thus using *one's work experience*.

„Handicraft Methodology" by A. and A. Dzērvīši is the first methodical book, which reveals handicraft training principles, developed in the 1920s-1930s based on educational staff, teachers' cognitions, on the basis of K.Cīrulis' established handicraft theoretical foundation. A. and A.Dzērvīši indicate that teaching methods were also used, when there were no schools. When driving the cattle to pasture children half-playing, half-seriously trained their forces, strengthened patience and stamina by performing simple handicrafts (Dzērvīši, 1937, 7). It began as *simple works in favour of more complex*, thus children were filled with serious work for life, acquiring life-experience operational skills.

Nowadays, based on theoretical knowledge, normative documentation, general didactic principles are activated for the realization at Home Economics and Technologies training in the aspect of the subject standard (see table 1).

Table 1. Didactic Principles of Modern Home Economics and Technologies Training.

No.	**General Didactic Principles** (National Standard of Elementary Education, 1998, 8-9)	**Connection with the requirements implementation in the aspect of Home Economics and Technologies when finishing form 3** (Regulations of the National Standard of Elementary Education and Elementary Education Teaching Standards, 2006).
1.	*Learning environment.* Favourable atmosphere at lessons.	A teacher's professionalism in organizing and implementing curriculum.
2.	*Unity of teaching and upbringing.* Learning means not only acquisition of knowledge and skills but also education of values.	One is able to maintain order in the workplace (paragraphs 10.2., 11.7.). (Paragraph 10.11.) is able to evaluate one's activities and results, learn to see positive progress in one's own and others work.
3.	*Individual approach.* Learning is an individually separate process.	Identification of one's abilities for the development of human habitat (paragraph 12). The teacher's ability to select tasks when acquiring various handicraft techniques (paragraph 11.9.).
4.	*Problem-solving approach.* Students search for links between the unknown and the known independently.	(Paragraph 11.4.) is able to find and use information from periodicals, books corresponding to a student. Choice of materials and tools for product manufacturing (paragraphs 11.8., 11.9.).
5.	*Development, growth.* Requirements in accordance with each student's abilities.	Identification of one's abilities for the development of human habitat (paragraph 12). (Paragraph 11.10.) is able to evaluate one's activities and results, learn to see positive progress in one's own and others work.
6.	*Connection of learning with practice.* Learning process is based on a student's practical life experience.	Knowledge and understanding of human habitat (paragraph 10) and practical and creative use of technologies to improve human habitat (paragraphs 11, 12).
7.	*Integrated approach.* Integrated learning based on a student's practical daily life experience.	Looking for interconnections between different subjects, such as acquisition of curriculum that is associated with knowledge and understanding of human habitat (paragraph 10) as well as acquisition of a variety of handicraft techniques (paragraph 11.9.) where it is necessary to use the knowledge and skills obtained in other subjects for manufacturing a product.
8.	*Continuity and diversity of evaluation.* A variety of methods including a student's self-evaluation.	(Paragraph 11.10.) is able to evaluate one's activities and results, learn to see positive progress in one's own and others work.

In practice, we made certain that the acquisition of Home Economics and Technologies curriculum is connected with daily life; there is a need *to encourage* students to work independently, without external assistance. It forms gradual accumulation of skills in the students' experiences. As teaching and education processes are closely related, then the teacher's competence in the acquisition of Home Economics and Technologies curriculum is important to choose such tasks, work organization forms, which are connected with useful products manufacturing, application of practical activity, in accordance with personal development needs.

Application of modern information technologies, including interactive whiteboard opens up new opportunities for the training methodology, use of the most topical information, knowledge, development, self-evaluation. Interactive whiteboard demonstrations allow complementing to the acquisition of learning material with sound and video effects that brings students to real life and thus enhances the emotional world, as well as improving the understanding of the subject matter. Interactive whiteboard, according to A. Bork, provides a direct link between learning material and the external world. In the interactive teaching process a student is a participant, not a viewer of this process, which improves the feedback formation (Bork, 1979).

I must say that practical work in Home Economics and Technologies includes problems of modernization of education. A.Šmite considers that, at the start of something new, there is *uncertainty, confusion*, often *psychological discomfort*, as one does not have required skills, but quality change is not imaginable without the new methods implementation (Šmite, 1998), S.Byron also confirms if teachers are not prepared to use information technologies in the classroom and are uncertain that information technologies will increase the effectiveness of teaching, then the changes in the process of teaching are not anticipated (Byron, 1995).

The use of video materials in a specific discussion on home economics issues is equally important, which does not only help students understand the matter, but particularly attracts attention, creates interest and motivates for active transaction, for example, visually considering dangerous consequences of ignoring work safety regulations, as well as the need for economy on materials, resources.

Efficiency of the Home Economics lesson can be improved by using an interactive whiteboard, for example, creating a food map, choice of clothing worn in accordance with the conditions or composition. We observed that part of the students learns easier, if they can retell it to others, help others. Pair work, teamwork develops collaborative skills, and also allows students to perform their work faster.

By compiling the analyzed material, it can be concluded that methodological cognitions of handicraft training have not lost their relevance in the acquisition process of modern Home Economics and Technologies curriculum at elementary school. In the acquisition of Home Economics subject content, the teacher's ability to use different teaching methods is important, as well as various methodological techniques that focus on enabling students' learning activities, promoting interest and understanding when acquiring knowledge in relation to daily life. The efficiency of an interactive whiteboard at the lessons of Home Economics is determined by the teacher's professional ability and daring in the choice and realization of new methods.

Conclusions

1. By studying the origin of teaching methodology of Home Economics and Technologies, we may conclude that the founders of handicraft methodology in Latvia, as well as representatives of the didactics offer a variety of teaching approaches based on European folk traditions in the development of students' skills.
2. Nowadays, it is typical to use the integrity approach in the organization of learning process of Home Economics and Technologies, the teacher's ability to link the curriculum with real-life situations.
3. The essential feature in the acquisition of the curriculum of Home Economics and Technologies is the methodological approach, which focuses on enabling the students' learning activities in the aspect of personal development, where the combination of the mental and physical is implemented, mental, emotional and volition harmony in practical operation.
4. The teacher's daring to use interactive technologies during the lesson is significant, when choosing an appropriate form of the learning process organization.

References

1. Bīlmane, M. (1924) *Šķēru griezumi*. Rīga, Kultūras balss izdevniecība, 30 lpp
2. Bīlmaņi M. un R. (1920) Veidošana skolā un mājmācībā. Rīga: Kultūras balss izdevn., 40. lpp.
3. Bork A. (1979) Interactive learning: Millikan lecture, American Association of Physics Teachers. *American Journal of Physics*, Vol. 47, pp. 5-10
4. Byron S. (1995) *Computing and other instructional technologies*. New York, 17 p.
5. Dzērvīši A. un A. (1937). Rokdarbu metodika. Rīga: Valters un Rapa, 80 lpp.
6. Fārt E. (1927) Meiteņu rokdarbi. D. 2. Rīga: J. Rozes apgāds, 103. lpp.
7. Krastiņa, E., Limanoviča, E., Drelinga,E., Volāne,E. (2008). *Mācību grāmatas ,,Praktiskā matemātika 1. klasei"* 1.daļa. Rīga: Zvaigzne ABC, 88 lpp.
8. Limanoviča, E., Krastiņa, E., Volāne, E.(2008). *Darba burtnīca ,,Praktiskā matemātika 1. klasei"* 1. daļa. Rīga: Zvaigzne ABC, 64 lpp.
9. Ļubļinska A.(1979) Bērnu psiholoģija. Rīga: Zvaigzne, 382. lpp.

10. Miezītis V.(1925). Drāzumi zēnu rokdarbiem. Rīga: autora izd., 36. lpp.
11. *Noteikumi par valsts standartu pamatizglītībā un pamatizglītības mācību priekšmetu standartiem* (2006) Ministru kabineta 2006. gada 23. decembra rīkojums Nr. 1027. http://isec.gov.lv/normdok/mk061027.htm. - Resurss aprakstīts 2011.gadā 15. jūnijā.
12. Panteļejevs A. (1936). Zēnu rokdarbi. Lauku un pilsētu pamatskolām. Rīga: Balodis, 272. lpp.
13. Pedagoģisko terminu skaidrojošā vārdnīca. Sastādījis autoru kolektīvs V. Skujiņas vadībā. Rīga, Zvaigzne ABC, 2000, 71
14. Pētersons E. (1931) Vispārīgā didaktika. Rīga: Gulbis, 130. lpp.
15. Rubana I.M. (2000) *Mācīties darot*.- Rīga: RAKA, 240 lpp.
16. Šmite A. (1998) Izglītības vadītāju Forumā. *Skolotājs*, Nr.5, 4-11.lpp.
17. Valsts pamatizglītības standarts (1998). Lielvārdē, Lielvārds, 32 lpp.
18. Volāne, E. (2010) M. Bīlmanes metodiskais mantojums mūsdienu skatījumā mājturības un tehnoloģijas stundās sākumskolā. ATEE Spring University 2010 Teacher of the 21st Century: Quality Education for Quality Teaching. Internationally Reviewed Collection of Articles. Riga: LU, *p. 630. – 639.* ISBN 078-9984-49-027-4
19. Volāne, E. (1997) Rokdarbi kā skolēnu darba prasmju veidošanās līdzeklis sākumskolā. Rīga, 68 lpp.
20. Zeidels R. (1926) Rokdarbi kā harmoniskas izglītības un audzināšanas pamats. Rīga: Latvijas skolotāju savienības izdevums, 31. lpp.
21. Zelmenis V. (1991). Īss pedagoģijas kurss. Rīga: Zvaigzne, 213. lpp.
22. *Zelmenis, V. (2000) Pedagoģijas pamati*. Rīga: RaKa, 291 lpp.
23. Žogla, I. (2001) *Didaktikas teorētiskie pamati*. Rīga: RaKa, 275 lpp.

STUDY PROGRAM "HOME ENVIRONMENT AND INFORMATICS IN EDUCATION" DEVELOPING OPPORTUNITIES

Mg.paed. Natalia Vronskaya
Latvian university of Agriculture, Faculty of Information Technologies
Natalja.Vronska@llu.lv, 26725155

Abstract. The aim of the research is to clear up the necessity of the information and communication technologies (ICT) integration methodology, offered by the author, in the household and home economic education. Studies with the ICT integration methodology, worked out by the author, include: 1) possibilities of unassisted and intensive household, home economic and informatics mutual integration providing and development; 2) diversifying and improving study methods; 3) extended application of ICT. Worked out ITC integration methodology was evaluated with analytic hierarchy process (AHP), by comparing defined criterions and subcriterions coupled together in relation to set aims. According to the global priority summary of experts, it is possible to conclude, that the highest total rating have alternative *studies* with the global priority vector of *ICT integration methodology* – 0.396. As well as *compliance with study content* based on criterions (0.310) and *the effectiveness of studying* (0.225) the first place takes alternative *studies with ICT integration methodology*. It means, that worked out and offered by the author ICT integration methodology is necessary in household and home economic studies.
Key words: ICT, household and home economic studies, alternative, integration methodology.

Introduction

The professional highest education bachelor study program *Home environment and informatics in education* was formed on the basis of academic study program supplementing with practical handicraft classes and field methodological practices in the end of each study year.

Analyzing this study program, the author conclude, that the courses relevant to household and home economic as well as informatics are included in sufficient amount.

Evaluating the amount of credits (Mājas vide un informātika izglītībā studiju plāns, online) in dedicated study courses included in study program *Home environment and informatics in education* author concluded, that 55.6 % from all study courses are professional dedicated courses, that means it is necessary to use dedicated household computer programs.

During working out dissertation, the author improve the content of professional study program *Home environment and informatics in education*, by offering the worked out ICT integration methodology.

Studies with ICT integration methodology worked out by author –directions to improve the quality of studies are:

- unassisted and intensive household, home economic and informatics mutual integration providing and development in studies;
- diversifying and improving of study methods;

- extended application of ICT (the carrying out necessary calculations for choice product to make, visualization and shaping of household product using the special household and home economic computer programs, current and final achievement control organizing in the household sphere etc.).

Today it is necessary to work with such up to date technologies as videoconference, interactive blackboard, digital document camera and the like, because the lecturer by using possibilities of these new interactive ICT will be able to attract attention of the audience and communicate in the highest level of communication, thanks to interactive audiovisual possibilities of ICT.

The author considers, that it is possible to improve the effectiveness of the lesson in study course Household and home economic by using *interactive blackboard*, for example, in the planning of family finances or for conforming the clothing to corresponding style, or for shaping the design composition of room, that is possible to make in groups and to make comparison, or for composing of menu virtually in groups, when, for example, one group thinks out the menu, the second group virtually lays the table. After the completing of task, each student individually evaluates the corresponding of laying to offered menu, by using interactive response system.

With the *digital document camera*, for example, using zoom it is possible clearly demonstrate how to tune the size of knitting needle to appropriate diameter of wool, or to show, how it is possible to embroider, for example, drawn-thread work or cross-stitch, as well as by dividing the screen in two parts, it is possible to make draft, leaving the draft in one side of screen and in the second side showing, how the actual final shape of draft develops. By help of the *digital document camera* or video camera, during household and home economic lessons it is possible to make video records how the product is coming formatted in specific theme, for example, in the batik lesson, dividing in three groups (tie, hot and silk batik).

By help of different computer programs it is possible to show the content of Household and home economics in dynamic format, by mutual combining of text, graphic, diagrams(*MS PowerPoint*), video and sound effects (*Movie Maker*),making interactive control tasks of achievements(*Hot Potatoes*), drawing drafts and making compositions (*Adobe Photoshop, Corel Draw, Gimp*)as well as using different special household and home economic computer programs(*Stitch Art Easy, Calling Knitting, MyCrochet, WeavePoint, Pattern CAD*), that is provided for facilitation and acceleration of household product preparing works technological process.

ICT integration methodology worked out by author was evaluated and compared with two another development possibilities of study programs: 1) *studies with current methodology*, 2) *e-studies*.

Studies with current methodology – radical changes in the professional highest education bachelor study program during studies of nascent Household and home economic teachers are not foreseeable.

In acquirement of study courses the problem-oriented approach and approach learning by doing are used; to nascent teachers improve their professional, social and methodological competence during studies, and after that creative to use it in their pedagogical practice. Students have possibility to use study aids and study materials in e-format prepared by lecturers as well as to submit self-contained works to lecturers in e-mail format and get consultations, if it is necessary.

For evaluation of study achievements different evaluating forms and methods are used according to aims, set in study course (seminars, tutorials, essay, self-contained works, tests, reflections). Lecturers using multimedia overheads during study process.

The study work is purposefully promoted to stimulate, promote and support the activity of student, self-dependence and cognition interest. Lecturer year by year ever realizable takes the role of consultant, organizer of discussion, organizer of studies.

E-studies – this environment exists on server and the users can reach system via internet browser. The lecturer by locating teaching materials in e-study environment, allows for students in due time introduce with them, in that way more time remains for discussions and talking about another similar problems. Therefore it is possibility to acquire the study theme deeper (LLU e-studiju sistēmas apraksts, online).

E-study environment offers different tools to make the acquirement of study course more affectively. In e-study environment the lecturers have possibility to upload and publish the study materials that is necessary to study work or simply to store them, students can download different study materials as well as submit their self-contained works, it is possible to apply time limit, the deadline for submitting of these works. Lecturer can evaluate the work by looking it in e-study environment, create online tests or questionnaires for students that are possible to evaluate by mark. Student can see results in mark book in e- study environment. It is possible to communicate with lecturer, to clear up the thing that he don’t understand or to discuss learnable theme, in that way the feedback is developing between student and lecturer. Lecturer in his turn can make analysis after some testing and see in what questions students have been more mistaken as well as average mark

or success level of the students of the given year. The location of study materials in e-study environment saves finances that are required for multiplying a distribution of study materials.

The comparison and evaluation of alternatives was carried out based on following cognitions of researchers and by working out necessary criterions and subcriterions for AHP (Saaty, 1980):

- Study process must be oriented to students and lecturers self-updating, it must stimulate and promote internal growth (Maslow, 1954).
- The realization of self-education principle is especially important nowadays, because due to science and technique fast developing, knowledge acquired in education establishments quickly becomes out-of-date, and therefore it is necessary for non-stop updating and making them richer. To realize life demand, during study process lecturer must persistently stimulate students to self-contained work to acquire knowledge, to teach using of catalogues, internet searchers, home pages and other reference objects (Albrehta, 2001).
- The student is in the centre of education process, he is prepared to any task acquiring and memorizing that is interesting for him. Concentrating to student and his ability, lecturer approach to study process from the viewpoint of humanistic approach and organizes educational process, by using approach oriented to student (Bazens, 2008).
- Each student must acquire certain knowledge and skills and must be motivated to realize sustainable development during all life – in the family, school, high school and work by developing lifetime education (Zeltiņa, Glikasa un Karule, 2009).

To perform AHP author worked out following five criterions:

- acquisition costs to realize study program with three defined subcriterions – powerful computer hardware and internet costs, costs of specialized computer programs, the costs of lecturer qualification improving;
- the time consumed for program preparation with three defined subcriterions – amount of time to work out study materials, training of lecturers and control of learning achievements;
- compliance with study contentwith four defined subcriterions – the international cooperation between education institutions, the stimulation of lifelong learning and deeper learning of students, development of professional, social and methodological competences;
- effectiveness of studying with three defined subcriterions –development and improving of knowledge, skills and professional competitiveness, stimulation of internal growth;

- psych-emotional convenience of study program acquiring with three defined subcriterions – the development of student personality, nonverbal and verbal communication with lecturer, ergonomic of learning environment.

The investigated problem is development possibilities of study program *Home environment and informatics in education*. The aim of research – to clear up the necessity for ICT integration methodology offered by author in household and home economic education

Research methods

The improving of study program *Home environment and informatics in education* learning methodology with ICT integration methodology worked out by author was evaluated using AHP. 10 experts took part in research (the lecturers from Latvia university of Agriculture, Faculty of engineering, Institute of Education and Home Economics as well as students - nascent teachers of Household and home economics.)

At first experts was introduced with ICT integration methodology improvement offered by author and three possible alternatives: studies with existing methodology, studies with ICT integration methodology and e-studies. After that experts, using relative relevance scale (Saaty, 1980), mutually compare defined 5 criterions and 16 subcriterions in pairs in relation to total aim, i.e. development possibilities of study program *Home environment and informatics in education*. Further in accordance to relevant expressions from AHP (Saaty, 1980), there was worked out calculations of priority vectors as well as definition of coherence index, to evaluate how the activities of expert corresponds to given method when he composed the table necessary to research.

The processing of all evaluations data of experts was carried out using MS Excel software, by calculating the average value of corresponding priority vector and showing it in graphic.

Results and discussion

Initially the data analysis vas carried out for each criterion by mutual comparison, the evaluations of experts are summarized in the Figure 1.

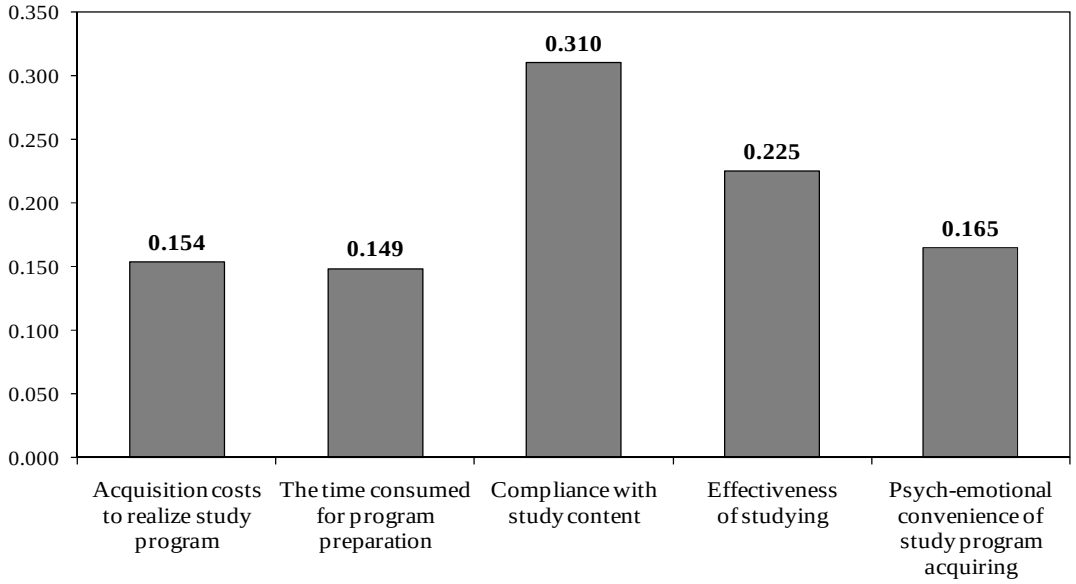


Figure 1.The evaluation of experts after mutual comparison of criterions

It is possible to conclude from the figure 1, that the highest rating have criterion *compliance with studies content* – 0.310. In the second place there is criterion *effectiveness of studying* – 0.225. In the third place there is criterion *psych-emotional convenience of study program acquiring* – 0.165. Then following *acquisition costs to realize study program* – 0.154 and *the time consumed for program preparation* – 0.149.

The following analysis of data is the expert's evaluation about development possibilities of study program *Home environment and informatics in education*. Each offered alternative (*studies with existing methodology*, *studies with ICT integration methodology* and *e-studies*) was evaluated according all sixteen subcriterions (Fig. 2).

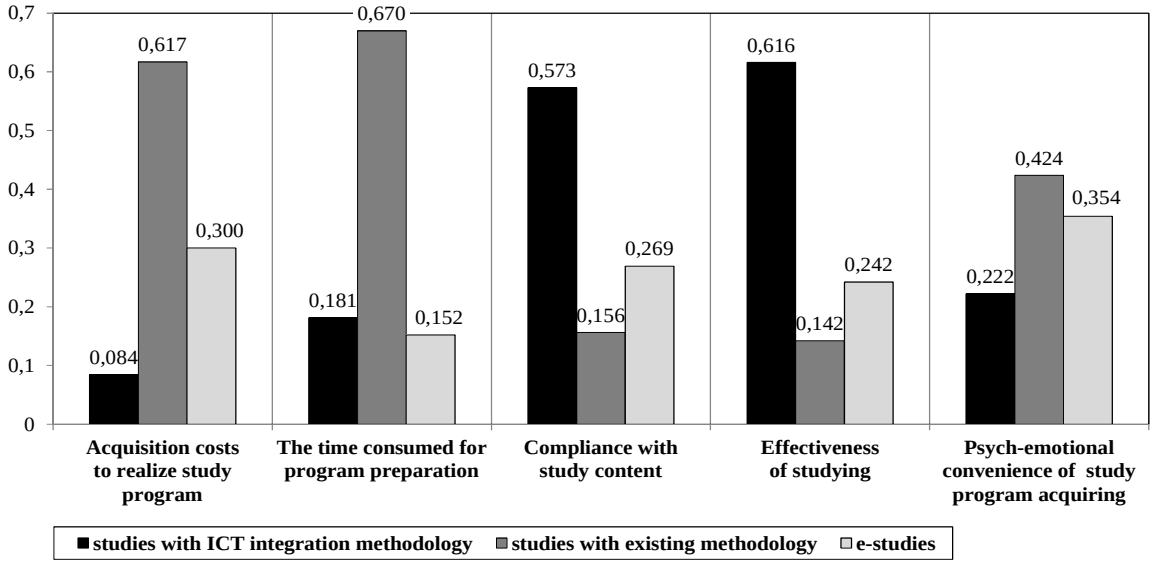


Figure 2. The evaluation of development possibilities of study program by experts

According to criterion *acquisition costs to realize the study program* the highest evaluation received alternative *studies with existing methodology* with the value of global priority vector - 0.617. In the second place there are alternative *e-studies* – 0.300, after that follows *studies with ICT integration methodology* –0.084. It is possible to explain such distribution by the fact, that for studies with existing methodology all necessary aids are delivered and acquisition costs for program realizing are not essentially. Also for e-studies it is not necessary to consume lot of resources; therefore this alternative is evaluated as the second. In return for studies with ICT integration methodology there is necessary to consume a lot of finances – both for purchasing of special household computer programs, and improving of lecturer qualification.

According to criterion *the time consumed for program preparation* the highest evaluation again received alternative *studies with existing methodology* with the value of global priority vector - 0.670. In the second place there is an alternative studies *with ICT integration methodology* – 0.181, after that follows alternative *e-studies* – 0.152. It is possible to explain such distribution by fact, that for studies with existing methodology learning and achievement controls materials are already worked out end in the case of necessity, there get improved. For studies with ICT integration methodology and e-studies there is necessary time for both learning and achievement control materials preparation, and lecturers training. In e-studies environment learning and achievement control materials will take more time than in studies with ICT integration methodology. In return more time will be consumed to prepare lecturers in special household and home economic computer programs that are provided in ICT integration methodology.

According to criterion *compliance with studies content* the highest rate this time takes alternative studies with ICT integration methodology with the value of global priority vector – 0.573. In the second place there are e-studies – 0.269 and then follows *studies with existing methodology* – 0.156. Such distribution is because stimulation of students' lifelong learning and deeper learning is going on with the ICT, because using of ICT comes more necessary and real more and more.

According to criterion *effectiveness of studying* the highest evaluation again takes alternative *studies with ICT integration methodology* with the value of global priority vector - 0.616. In the second place there are e-studies – 0.242 and in the third place there are studies *with existing methodology* – 0.142. Such distribution is because the development and improvement of knowledge, skills as well as development of professional competitiveness currently have been popularized by the possibilities offered by ICT.

According to criterion *psych-emotional convenience of study program acquiring* the highest evaluation received alternative *studies with existing methodology* with the value of global priority vector - 0.424. After that follows alternative *e-studies* – 0.354 and then *studies with ICT integration methodology* – 0.222.

As the last one, the summary value of global priority vector was calculated, where the average values of corresponding priority vectors are showed (Fig.3.).

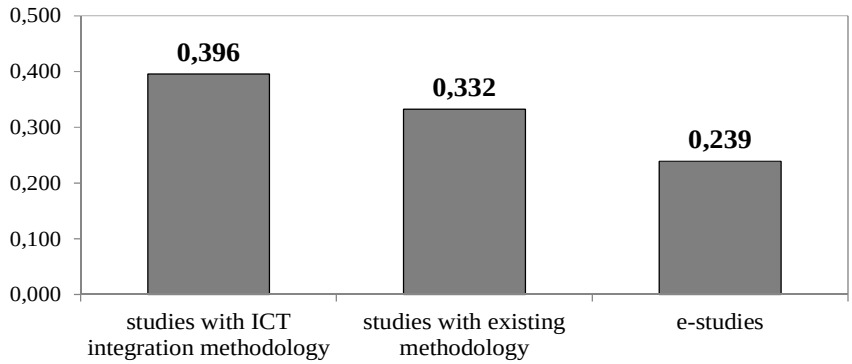


Figure 3.The summary of experts' global priorities about development possibilities of study program *Home environment and informatics in education*

The highest total rate after all sixteen subcriterions have alternative *studies with ICT integration methodology* with the value of global priority vector - 0.396, then follows alternative *studies with existing methodology* with the value of global priority vector - 0.322 and the third place based on experts evaluation takes alternative *e-studies* – 0.239.

For criterions *acquisition costs to realize study program* and *the time consumed for program preparation* more preferable alternative is *studies with existing methodology,* because there is not necessary to spend time for preparing as well as financial resources to formation. In return, according to criterion *compliance with studies content* and *effectiveness of studying* in the first place comes the alternative *studies with ICT integration methodology.* It is possible to see in fig.1 that by making mutual evaluation of criterions, experts give the highest rate to criterions *compliance with studies content* and *effectiveness of studying*.

Conclusions

1. According to processing of experts inquiry using AHP, the aim of that was to clear out development possibilities of study program *Home environment and informatics in education* it is possible to conclude, that the total highest rate based on sixteen criterions have alternative *studies with ICT integration methodology* with the value of global

priority vector - 0.396, then follows alternative *studies with existing methodology* with the value of global priority vector - 0.322 and the third place based on experts evaluation takes alternative *e-studies* – 0.239.

2. For criterions *acquisition costs to realize study program* and *the time consumed for program preparation* more preferable alternative is *studies with existing methodology*, because there is not necessary to spend time for preparing as well as financial resources to formation. In return, according to criterion *compliance with studies content* and *effectiveness of studying* in the first place comes the alternative *studies with ICT integration methodology.* Exactly these criterions have the highest rating from experts, the *compliance with studies content* - 0.310 and *effectiveness of studying* – 0.225.
3. It means that the worked out and offered by author ICT integration methodology is necessary in Household and Home economic studies.

Acknowledgements

This research work is supported by the ESF project „Atbalsts LLU doktora studiju īstenošanai ietvaros" contract Nr. 2009/0180/1DP/1.1.2.1.2/09/IPIA/VIAA/017

References

1. Bazens T. (2008) *Efektīvas mācīšanās rokasgrāmata*. Rīga: Jāņa Rozes apgāds, 159.lpp
2. LLU e-studiju sistēmas apraksts [tiešsaiste] [skatīts 15.07.2011.]. Pieejams: http://estudijas.llu.lv/file.php/4/ievada_apraksts_estud.pdf
3. Mājas vide un informātika izglītībā studiju plāns [tiešsaiste] [skatīts 15.07.2011.]. Pieejams: https://irma.cs.llu.lv/pls/pub/stal.prg_s2?l=1&cl=0&n1=154&o1=1&t0=G0403&t3=FO0031&p1=-
4. Maslow A. (1954) *Motivation and Personality*. Harper and Bros.
5. Saaty T.L. (1980) *The Analytic Hierarchy Process*. NewYork: McGraw-Hill.
6. Zeltiņa M, Glikasa O, Karule L. (2009) Izglītība ilgtspējīgai attīstībai. *Skolotājs*, 1 (73), 14.-16.lpp.

PEDAGOGA PROFESIONALITĀTE UN NEPĀRTRAUKTA PROFESIONĀLĀ PILNVEIDE

TEACHER`S PROFESSIONALISM AND CONTINUOUS PROFESSIONAL DEVELOPMENT

Līvija Zeiberte
Latvijas Universitāte
Jūrmalas gatve 74/76, Rīga, LV-1083
zeiberte@gmail.com
mob.t.26428690

Abstract. The world's society in 21st century is experiencing not only deep changes in all fields of life, but as well realization that to understand and to manage these changes you need a completely conceptually new approach. In the situation, when general education is beginning to become an element of societies lifelong-learning, teachers have been asked to participate in the process of reaching new goals of this new education. It is obvious that the major and the most important involvement in this process is the teachers' professionalism. Nowadays teachers' professionalism is measured by three within themselves connected concepts: knowledge, autonomy and responsibility.

The education in the state level in many countries, including Latvia, is monitored by the professional standard of the teachers. It specifies all necessary competences as well as points to the next available way in professional development in further education. Continuous Professional Development in further education has been looked at as a coefficient for systematic development and as a confirmation of achieving educational goals, which guides teachers to achieve and develop individual skills and knowledge as well as helps to prepare themselves for work in their profession.

Today by professional development we understand: lifelong learning, a fulcrum of self-development, a monitoring and security tool for teachers at their work place, the tool to ensure society of the teachers' professionalism, a confirmation that all state's education institution requirements and suggestion have been fulfilled, a professional competence confirmation for an employer.

There are three basic teachers' further education elements mentioned within the scientific literature, they are following:

1. To ensure the undisrupted continuity of the professional teachers' competence development in helping to modernize and widen professional skills and knowledge.
2. To ensure available options to develop competences what lets one prepare for development in their professional career.
3. To develop individual and professional effectivity therefore rising self confidence in teachers and their satisfaction with their work.

Different education models let you systemize the working spheres where the professional development is happening. As one of the nowadays most common models is the constructivist paradigm matching the transformative further education model.

Key words: teachers' professionalism, further education, continuous professional development (CPD)

Pedagoga profesionalitāte 21.gadsimtā

Pasaules sabiedrība 21.gadsimtā piedzīvo ne tikai dziļas pārmaiņas visās dzīves jomās, bet arī to, ka to izpratnei un vadīšanai nepieciešama konceptuāli jauna pieeja. Pedagoga profesionalitātes kvalitātes rādītājs vienmēr ir spēja atbilstoši ātri un efektīvi sekot sociālajām, organizācijas un tehnoloģiju pārmaiņām, reaģēt uz valdības politikas un Eiropas savienības norādījumiem un ieteikumiem. Kā atzīmē Skots, par pagātni jāuzskata agrākie, modernisma sabiedrībai raksturīgie slēgto izglītības sistēmu modeļi un tādi jēdzieni kā lineārā domāšana,

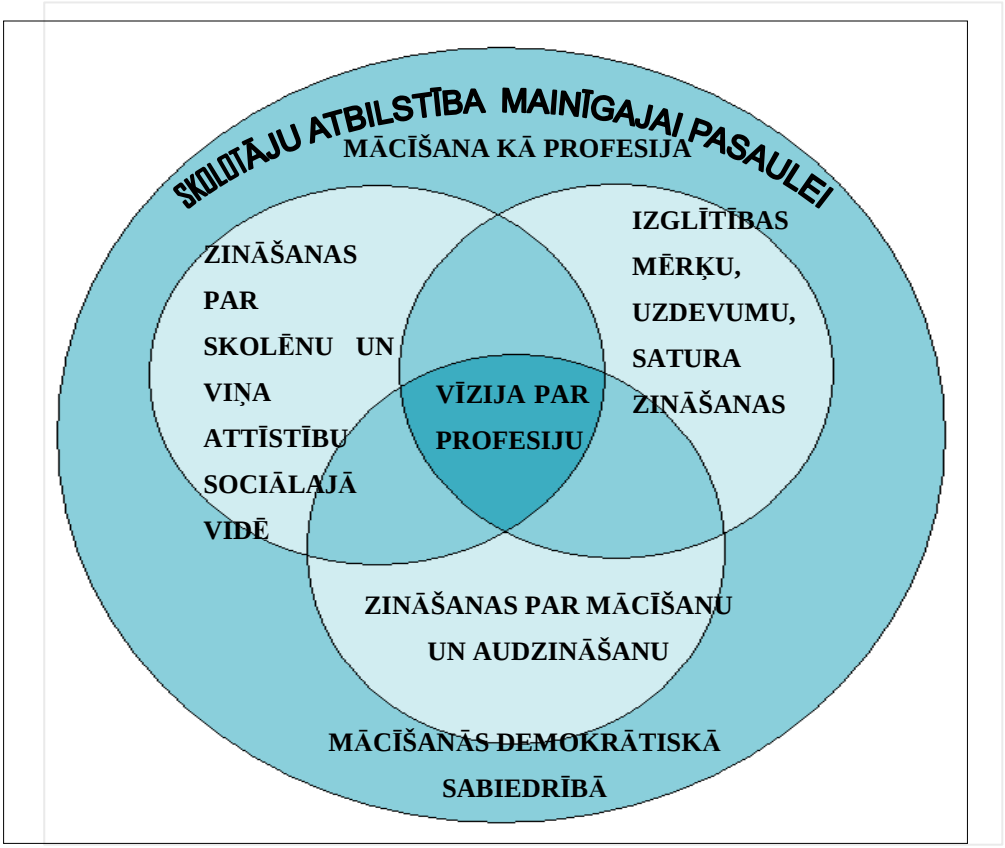
stabilitāte, gadījums, dabiskā kārtība, utml. Bihevioristiskās, kognitīvās un pragmatiskās teorijas, kuras akcentē tradicionāli vispāratzītu zināšanu nodošanu nākamajai paaudzei, 21.gadsimtā nomaina konstruktīvā izglītības paradigma, kura piedāvā katram indivīdam savas zināšanas par pasauli konstruēt pašam (Skots, 2003). Pedagoga profesionalitāte kā teorētisks jēdziens un kā apzīmējums praktiskai darbībai, tiek plaši diskutēts zinātniskajā literatūrā (Orr, 2008; Darling-Hammond, 2006; Blūma, 2008; Gleeson, 2005; Kennedy, 2005; Sachs, 2003; Robson, et al., 2004; Stronach, et.al., 2004, Bathmaker, 2000; Fulans, 1999, u.c) un atspoguļots izglītības politikas dokumentos. Veicot zinātniskās literatūras izpēti, rakstā tiek piedāvāta pedagoga nepārtrauktas profesionālās pilnveides un profesionalitātes satura izpratnes analīze.

Jaunajā situācijā, kad formālā izglītība kļūst par mūžizglītības elementu, pedagogi tiek aicināti piedalīties jaunās zināšanu sabiedrības mērķu sasniegšanas nodrošināšanā. Darlinga-Hammonda uzsver, ka acīmredzams kļūst fakts, ka šajā procesā, no visiem izglītības resursiem pedagoga profesionālais ieguldījums ir izšķirošais. (Darling-Hammond, 2006).

Arī Persons norāda, ka pedagogu profesionalitāti sāk uzskatīt par vienu no garantiem izglītības politikas īstenošanai (Persson, 2010). Blūma atzīmē, ka mūsdienu izglītības saturs izvirza augstas prasības pedagogu profesionalitātes līmenim līdz ar to profesionālā kompetence pilnveidojama visas profesionālās darbības laikā kā mūžizglītības būtība (Blūma, 2008).

Metodiskajā materiālā „Jaunais skolotājs" tiek sniegts aprakstošs pedagoga profesionalitātes skaidrojums„... skolotājam jāmācās pieņemt pamatotus lēmumus, gan lai spētu kvalitatīvi vadīt mācību procesu, gan lai modelētu un attīstītu lēmumu pieņemšanas un pamatošanas un komunicēšanas prasmi savos skolēnos. Skolotājam jāspēj nebaidīties no jaunā, nezināmā, jāizjūt vēlme un prieks mācīties visa mūža garumā... "(Jaunais skolotājs, 2006,23).

Darlinga-Hamonda *(skat.1.att.)* veido vīziju par pedagoga profesiju, norādot, ka demokrātiskā sabiedrībā pedagogam ik dienas jāpieņem svarīgi un sarežģīti lēmumi, kas var būtiski ietekmēt skolēna nākotni.



1.attēls. Pedagogs demokrātiskā sabiedrībā.
(adaptēts Pēc Darling-Hammond & Brandsford,2005).

No profesionāla pedagoga sabiedrība sagaida plašas, dažādu veidu zināšanas gan par skolēnu un viņa attīstības procesiem, gan izglītības mērķu, uzdevumu, satura izpratni un zināšanas par mācīšanu, mācīšanos un audzināšanu. Tas liek pedagogam nepārtraukti pilnveidot nepieciešamās kompetences, vienlaicīgi ievērojot, ka izglītības procesa posmus vienmēr caurauž pedagoga profesijā tik nepieciešamais morālais aspekts (Darling-Hammond, 2006).

Robsons pedagoga profesionalitāti raksturo ar trīs savstarpēji saistītiem jēdzieniem- zināšanas, autonomija un atbildība. Pedagogs savā darbībā saskaras ar sarežģītām un bieži neprognozējamām situācijām, kur nepieciešamas īpašas zināšanas, bet, lai tās lietotu, ir nepieciešama noteikta brīvība lēmumu pieņemšanā. Nodrošinot autonomiju, pedagogam kļūst iespējams darboties atbildīgi, saskaņā ar profesionālajām vērtībām (Robson, 2004).

Kā uzsver Babba un Ērlijs, pedagoga profesionālās pilnveides efektivitāti var nodrošināt pedagoga personības attīstība kopveselumā, kas jāveic līdzīgi, kā tas ir darbā ar skolēnu, ievērojot motivāciju, vajadzības, spējas un personības iezīmes.

Trīs tendences, kas 21.gadsimtā raksturo pedagoga profesionalitāti un nepārtrauktās profesionālās pilnveides procesu, Kollinsones pētījumā ir:

- glokalizācijas attīstība, kad globālie un lokālie procesi un praktiskie aspekti atrodas ciešā simbiozē. Izglītībā tiek lietoti vienoti universāli jēdzieni, kuriem mācību procesā pedagogs pievieno nacionālās kultūras vērtības, piemērus un problēmas;
- mentoringa ieviešana, lai jaunos pedagogus sekmīgi ievadītu sarežģītajā pedagoga profesionālajā lomā;
- pārmaiņas pedagogu vērtēšanā, kad tradicionālās novērtēšanas (pārraudzības) vietā nāk alternatīvās izvērtēšanas metodes - pašvērtējums, portfolio, darbības pētījums,u.c. (Collinson, et al.,2009).

Pedagoga profesionalitātes veidošanās aspekti

Kvalitātes indikatoru noteikšana ir izaicinājums un aktuāla nepieciešamība ne tikai izglītības jomā. Pedagogu profesionalitāti izvērtējot vienkāršāk ir mērīt „aisberga" virsūdens daļu - mācīšanas prasmes un zināšanas priekšmetā, kas veido daļu no skolotāja darbības efektivitātes faktoriem. Kompetenta profesionāļa darbību ietekmē dažādi identitāti veidojoši faktori, arī sociālās lomas, pašvērtējums, rakstura īpašības un motivācija (Bubb, Earley, 2007).

Karnels, raksturojot pedagoga profesionalitātes attīstību, nosauc četrus aspektus:

- tā ir mūžizglītība, kas saistās ar profesionālās un personības izaugsmes nepārtrauktiem meklējumiem;
- sadarbība un labvēlīga komunikācija ar skolēniem un kolēģiem;
- vēlme nepārtraukti pilnveidot sava darba efektivitāti, apgūstot un radot arvien jaunus mācīšanas un mācīšanās veidus un paņēmienus;
- multiperspektīvs un visaptverošs skatījums uz izglītību un mācīšanos kopumā (Carnell, 2001).

Var pievienoties atziņai, ka 21.gadsimtā mainoties pedagoga profesijas saturam, mainās arī profesionalitātes izpratne, kas būtiski ietekmē nepārtrauktas pedagogu profesionālās pilnveides saturu. (Kennedy, 2005; Sachs, 2003).

Evanss savā profesionalitātes definīcijā ietver tās metodoloģisko aspektu, uzskatot, ka tā ir ideoloģiski, attieksmju, intelektuāli un epistemoloģiski balstīta indivīda nostāja attiecībā uz profesiju, kurai viņš pieder, un kas ietekmē viņa profesionālo darbību (Evans, 2002).

Stronahs, apkopojot diskusiju par šī jēdziena nozīmi pedagoga profesijas būtības noskaidrošanā saka, ka profesionālisms ir jēdziens, kas ir radīts no „metodoloģiskiem ierobežojumiem, retorikas inflācijas un universālisma pārpilnības" (Stronach et al., 2004, 109).

Izglītības politikas līmenī daudzās valstīs, arī Latvijā, pedagoga profesionalitātes saturu nosaka pedagoga profesijas standarti. Anglijā, kur 2007. gadā tika izstrādāts arī pedagogu tālākizglītības standarts, izglītības pētnieks Glīsons to vērtē kā diskutablu „ārējo atbalstu" pedagoga profesionalitātei (Gleeson, et al., 2005). Tomēr Orrs secina, ka šis dokuments, nosakot kompetences, kuras jāpilnveido tālākizglītībā, sniedz vienlaicīgi arī profesionalitātes kritērijus kompetenču formā (Orr, 2008).

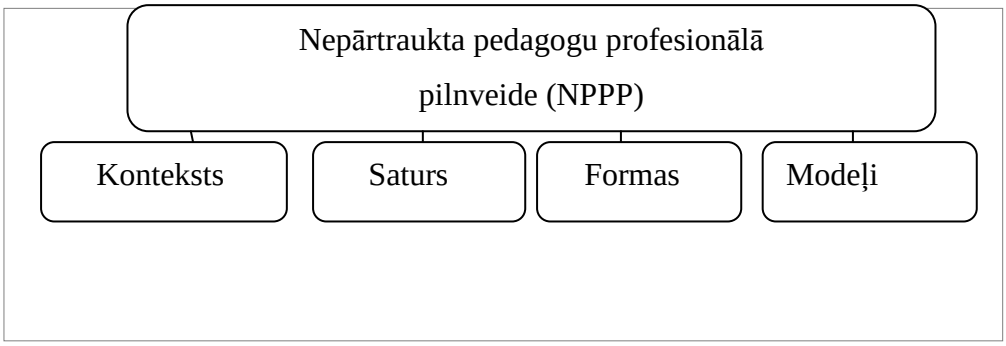
Piekrītot uzskatam, ka Pedagoga profesijas standarts (2004) arī Latvijā ļoti apjomīgi un vispārīgi, uzskaita visas kompetences, kuras raksturo pedagogu kā profesionāli, jānovērtē, ka tas tomēr sniedz vienotu skatījumu, kuru iespējams izmantot, ne tikai pedagogu profesionālajā sagatavošanā augstskolā, bet arī vadot, plānojot un vērtējot profesionālo pilnveidi tālākizglītībā. Tiesa, zināšanu sabiedrības interesēs ir, lai izstrādātie standarti būtu pietiekoši elastīgi, dinamiski un atvērti pārmaiņām, nodrošinot mūsdienīgu izglītības pārvaldību. Jaunais Pedagoga profesijas standarta projekts (2011) veidots kā atbalsts pedagogu tālākizglītības stratēģiskajā plānošanā valstī, jo skaidri iezīmē profesionalitātes attīstības virzienus.

Profesionalitāte un nepārtraukta profesionālā pilnveide

Pedagogu profesionālo pilnveidi, kā profesionalitātes veidošanās procesu, var raksturot pētot tās saturu, formas, modeļus un kontekstu. (*2. att.)*.

Valsts izglītības mērķu kontekstā, pedagogu profesionālā pilnveide tiek aplūkota kā svarīgs līdzeklis to sasniegšanā. Šis vērtējums nozīmē pilnveides procesa ilgstamību un nebeidzamību, kas ļauj uzskatīt to par nepārtrauktu.

Tātad, profesionālā pilnveide mūsdienās tiek aplūkota kā nepārtraukts process, un tāpēc pētījumos tiek lietots nepārtrauktas pedagogu profesionālās pilnveides (NPPP) jēdziens, kas ir viens no pamatjēdzieniem tālākizglītībā.



2.attēls. Pedagogu profesionālās pilnveides aspekti.

Jēdziena izpratnē sastopamies ar tā lietošanu plašākā un šaurākā nozīmē. Kā tiek atzīmēts OECD TALIS pētījumā, atšķirības veido tas, ka plašākajā jēdziena izpratnē tiek iekļauta arī sākotnējā profesionālā sagatavotība augstākajās mācību iestādēs un mācību prakse izglītības iestādē. Tātad profesionālā pilnveide tiek aplūkota kā sistemātiskas aktivitātes, kuras palīdz pedagogam iegūt un nepārtraukti attīstīt individuālās prasmes, zināšanas, un palīdz sagatavoties visām profesijā nepieciešamajām darbībām (OECD, TALIS, 2009, 49) *(3.att.)*.

Šo profesionālās pilnveides skatījumu var vērtēt kā mūžizglītībai raksturīgu, jo tas aptver indivīda profesionalitātes attīstību visas dzīves garumā un plašumā.

3. attēls. Profesionālā pilnveide mūžizglītības izpratnē.

Latviešu valodā mūsdienās tiek lietoti divi jēdzieni: *tālākizglītība* un *pedagogu profesionālā pilnveide.* Pirms 1991.gada tālākizglītībā biežāk sastopams *profesionālās kvalifikācijas* jēdziens, kas mūsdienās uzskatāms par šauru, jo pedagogs skolā bieži māca vairāku mācību priekšmetus, kas bieži nav cieši saistīti ar viņa iegūto sākotnējo kvalifikāciju. Savukārt, 90-tajos gados ieviesto *profesionālās meistarības* jēdzienu šodien nomaina *nepārtrauktas profesionālās pilnveides* jēdziens, jo tiešāk norāda uz procesa ilgstamību visas pedagoga profesionāli aktīvās dzīves laikā. Tomēr, šo jēdzienu saturs turpina būt visai nenoteikts, kā to atzīst daudzi izglītības nozares pētnieki, t.sk.(Friedman &Philips (2004), Hoban (2002), Middlewood (2005), u.c.

Jēdziens *tālākizglītība* Latvijas izglītības telpā tiek lietots šaurākajā nozīmē, apzīmējot izglītības turpināšanu pēc formālās izglītības ieguves un darba gaitu uzsākšanas. Savukārt, *pedagogu profesionālā pilnveide* ir sistemātiska pedagoga profesionālās kompetences (kursos, semināros, projektos, pieredzes apmaiņas pasākumos, mācību materiālu un grāmatu izstrādē utml.) paaugstināšana (Pedagogu tālākizglītības metodiskā tīkla nodrošinājuma izveide, 2008). Pirmajā gadījumā tiek domāta izglītības forma, otrajā tiek raksturots tālākizglītības saturs. Līdzīgu

skaidrojumu sniedz arī Fīlds, uzskatot, ka pedagoga profesionālā pilnveide ietver jebkuru aktivitāti, kura vairo skolotāja zināšanas un izpratni (Field, 2005).

Midlvuda, raksturojot izglītības vidi, uzskata, ka *profesionālā pilnveide (development)* ir pastāvīgs, nepārtraukts refleksijas un iegūto zināšanu pārbaudes process, kas saistīts ar individuālās, korporatīvās un resoru vajadzībām atbilstošas attīstības plānošanu. Savukārt, *profesionāla izglītošanās (learning)* ir pašpilnveides process, kas sekmē gan pedagoga personīgo izaugsmi, gan viņa profesionālo zināšanu un prasmju attīstību , kas sekmē izglītības procesu klasē (Middlewood, et al.,2005) .

Tomēr Frīdmans un Filips konstatē, ka bieži par profesionālo pilnveidi tiek saukti formāli, ar vispārīgiem darba jautājumiem vai kvalifikāciju saistīti kursi. Viņuprāt, profesionālās pilnveides jēdzienu svarīgi saistīt ar plašāko mūžizglītības jēdzienu (Friedman, & Philips, 2004). Pēdējo divdesmit gadu pētījumi ir konstatējuši jaunu pedagogu profesionālās pilnveides paradigmu, kura noraida kampaņveidīgus, obligātus seminārus un kursus, dodot priekšroku jaunām, efektīvākām formām, kur vienlīdz svarīgs ir tālākizglītības saturs, konteksts un tās organizācijas plānojums.

Arī Gordons attīsta izpratni par pedagogu tālākizglītību kā mūžizglītību, kuru raksturo komplicēts, nepārtraukts, interaktīvs un dinamisks nepārtrauktas profesionālās pilnveides process (Gordon, 2009).

Perratons, Krīds un Robinsons atzīmē, ka šodien profesionalitātes pilnveide notiek, ja:

- nepārtraukti tiek papildināts skolotāja vispārējās izglītības līmenis;
- nostiprinātas zināšanas un sapratne par viņa priekšmetu;
- veidota sapratne par to kā mainās mācīšanās process no priekšmeta uz priekšmetu;
- attīstītas praktiskās zināšanas un iemaņas;
- apgūtas jaunas mācīšanas stratēģijas;
- iegūtas zināšanas, kā lietot jaunas tehnoloģijas;
- pilnveidota pedagoģiskā profesionālitāte;
- papildinātas un aktualizētas zināšanas un prasmes, kas saistītas ar vienmēr mainīgajām sabiedrības vajadzībām (Perraton H., et al., 2001).

Jēdziens „transformatīvā skolotāju profesionalitāte" *(transformative teacher professionalism)* pēdējo gadu laikā ir bieži sastopams pētījumos, kur tiek pētīta pedagogu profesionalitātes pilnveide (Little, 2003, Friedman&Philips, 2004; Kennedy, 2005,u.c.). To var uzskatīt par 21.gadsimta konstruktīvajai mācīšanās mācīties paradigmai visatbilstošāko, vispusīgāko atbalstu pedagogam gan personiskajā gan profesionālajā līmenī, jo tiek akcentēta

saikne starp teoriju un praksi, refleksija, jaunu zināšanu konstruēšana un pielietošana jaunās situācijās, kā arī profesionālās un politiskās vides iepazīšana.

Secinājumi

1. 21.gadsimtā pedagoga profesionalitātei ir būtiska nozīme zināšanu sabiedrības izglītības mērķu sasniegšanā, ātri un efektīvi reaģējot uz sociālajām, organizācijas un tehnoloģiju pārmaiņām.
2. Profesionalitātes nodrošināšanā būtiska nozīme ir nepārtrauktai profesionālajai pilnveidei.
3. Pedagoga profesionalitātes kritēriji saistās ar prasmi būt radošam pētniekam, kurš atvērts jaunajam, aktīvi līdzdarbojas sabiedrības kopīgo izglītības mērķu īstenošanā, dažādās formās un veidos mācās pats un veicina pārējo mācīšanos.
4. Profesionālā pilnveide ir:
   - mūžizglītība;
   - personības pilnveides līdzeklis;
   - kontroles un drošības garants pedagogam darba vietā;
   - līdzeklis, lai pārliecinātu sabiedrību par pedagoga profesionālismu;
   - apliecinājums tam, ka valsts izglītības institūciju ieteikumi un prasības izglītības
   - sistēmā tiek izpildītas;
   - profesionālās kompetences apliecinājums darba devējiem.
5. Pārmaiņas pedagoga profesionalitātē var raksturot ar jēdzieniem: zināšanas, mācīšanās, pašizziņa, attīstība, pilnveide, socializācija, izaugsme, novitāšu ieviešana, kognitīvās un afektīvās pārmaiņas, autonomija un atbildība.
6. Pedagogu profesionalitāti 21.gadsimtā raksturo transformatīvā profesionalitāte, kas tiek uzskatīta par vienu no garantiem izglītības politikas īstenošanai.

Izmantoto literatūras avotu saraksts

1. Bathmaker, A-M. (2000). Standardising teaching: the introduction of the national standards for teaching and supporting learning in further education in England and Wales. In: *Journal of In-service Education*, 26(1), 9-23.
2. Blūma, D. (2008). Skolotāju profesionālā pilnveide. Krāj.: Pedagogu tālākizglītības metodiskā tīkla izveide. Rīga: VIKNVA, 13-18.
3. Bubb, S., Earley, P. (2007). Leading and managing continuing professional development. PCP, Sage.
4. Carnell, E. (2001). The value of meta-learning dialogue. Professional development today, 4(2), 43-54.
5. Collinson, V., Kozina, E., Lin,Y.,et al. (2009). Professional development for teachers: a world of Change. European Journal of teacher Education Vol.32 (1), 3-19.
6. Darling – Hammond, L. (2006). Constructing 21st-century teacher education. In: Journal of Teacher Education, Vol. 57 (10), 1-15.

7. Evans, L. (2002).What is teacher development? In: Oxford review of education 28(1), 123-137.
8. Field, K. (2005). Continuing professional development for leaders and teachers: the english perspective. In: The continuing professional development of educators. Symposium Books. 61-79.
9. Friedman, A., Philips, M. (2004). Continuing professional development: developing a vision, In: *Journal of education and work*, Vol 17.No 3, 361-376.
10. Fulans, M. (1999). Pārmaiņu spēki: izglītības reformu virzieni. Rīga, Zvaigzne ABC.
11. Gleeson, D., Davies, J., Wheeler, E. (2005). On the making and taking of professionalism in the further education workplace. In: *British Journal of Sociology of Education*, 26(4), 445-460.
12. Gordon, J., Halasz, G., Krawczyk, M., Leney, T., Michel, A., Pepper, D., Putkiewicz, E., Wisniewski, J. (2009). Key competences in Europe: opening doors for lifelong learners across the school curriculum and teacher education. Warsaw : CASE.
13. Hoban, G.F. (2002). Teacher learning of educational change. Contextual model of learning. Available at: http://www.ilinet.org/contextualmodel.htm (*skatīts 2008.16.11.)*
14. Jaunais skolotājs (2006). Rīga: IAC.
15. Kennedy, A. (2005). Models of continuing professional development (CPD): a framework for analyses. In: *Journal of In-service Education*, 31 (2), 235-250.
16. Little, J.W. (2003). Inside teacher community: representations of classroom practice. In: *Teachers College Record*, 105(6), 913-945.
17. Middlewood, D., Parker, R., Berre, J. (2005). Creating a learning school. Paul Chapman Publications.
18. OECD Teaching and learning international survey (TALIS) (2009). http://www.oecd.org/document/0/0,3746,en_2649_39263231_38052160_1_1_1_1,00.html (*skatīts 2010.11.08.).*
19. Orr, K. (2008). Room for improvement? The impact of compulsory professional development for teachers in England`s further education sector. In: *Journal of In-service education*, 34(1), 97 -108.
20. Perraton, H., Creed, C. and Robinson, B. (2002). Teacher education guidelines: using open and distance learning. Paris: UNESCO.
21. Persson, M., Oscarsson, H.(2010). Did the egalitarian reforms of the Swedish educational system equalise levels of democratic citizenship? In: *Scandinavian Political Studies* 33(2), 135-163.
22. Robson, J., Bailey, B., Larkin, S.(2004). Adding value: investigating the discourse of professionalism adopted by vocational teachers in further education colleges. In: *Journal of Education and Work*, 17(1), 183-195.
23. Sachs, J. (2003). The activist teaching profession. Buckingham: Open University Press.
24. Scott,W. R.(2003). Organizations: rational, natural and open systems. NJ: Prentice Hall.
25. Stronach, I., Corbin, B., McNamara, O. (2004).Towards and uncertain politics of professionalism: teacher and nurse identities in flux. In: *Journal of Education Policy*, 17(1), 109-138.

CIVIL SOCIETY CRISIS IN POLAND AND ATTITUDES TOWARDS POLITICIANS

Adam Grabowski, PhD, University of Warmia and Mazury in Olsztyn, Katedra Psychologii, ul. Prawocheńskiego 13, 10-100 Olsztyn, Poland, gradam@uwm.edu.pl, +48503642953

Abstract. The unsettlingly high percentage of Polish citizens (especially young and well-educated ones) choosing not to participate in democratic procedures, such as elections, referenda etc., can be regarded as the basic symptom of a serious civil society crisis observed in Poland nowadays. In search of the antecedents of the crisis, analysts point primarily to the faulty functioning of the state main institutions. Social psychology suggests a different approach to studying the antecedents: It may be much more important how politicians themselves are perceived and evaluated than what the citizens' opinion about the state institutions is. Thus, the present study examined young people's attitudes (and the attitudes' predictors) towards politicians – members of the three parties representing the main political forces in Poland: PiS (Law and Justice), SLD (Democratic Left Union), and PO (Citizens' Platform). The results consistently demonstrate that Polish politicians, even those representing the PO who evoked the respondents' most positive reactions as compared to those from the other two parties, are not too highly-evaluated, particularly because their morality is assessed as low. The personal, usually far from being positive, attitudes towards politicians then might be the main reason why so many Poles choose not to participate in the social-political life.
Key-words: Citizens, politicians, dialogue, attitude, competence, morality.

Introduction

In any democratic country politicians and citizens are interdependent: On the one hand, politicians' being in power depends on citizens' participating in democratic procedures, on the other, virtually all aspects of citizens' everyday existence are affected by politicians' decisions. The interdependence or reciprocal influence (Markus, 2001) could be perceived as a form of dialogue between the society and its political leaders (Habermas, 1996). This paper aims to examine why the Polish post-communist democracy resembles the politicians' monologue rather than their dialogue with the citizens. Indeed, even though the politicians always remain the active party in the interaction, there is an unsettlingly high percentage of Polish citizens (especially young and well-educated ones, cf. Cześnik, 2007; Korkut, 2005) withdrawing from the dialogue and choosing not to participate in elections, referenda or any other democratic procedures (Regulska, 2009). This democratic passivity is regarded as the basic symptom of a serious civil society crisis affecting the post-communist Polish democracy (Cześnik, 2007; Szumlewicz, 2008). The usual turnout at the parliamentary election, for example, oscillates between 40 and 50%. It decreases to barely 40%, however, if the election is to local self-government structures (Regulska, 2009) and even more so, to approximately 20% (!), if the European Parliament Members are elected.

Analysing the meagre participation phenomenon, experts point out that Polish citizens may generally feel neglected and exploited by the faulty functioning state institutions represented by officials (usually recruited from political parties) pursuing their own rather than the citizens'

happiness (Cześnik, 2007; Lipiński, 2004). Further, as sociologists emphasise, a considerable number of citizens might feel discouraged to vote because of the discrepancy between what politicians promise before the elections and what they actually do afterwards (Korkut, 2005). Also, there could be widespread confusion over the politicians' real intentions as it is frequently the case that the social goals political parties claim to pursue are incompatible with their political options (cf. Lipiński, 2004; Szumlewicz, 2008).

One important aspect, however, still seems to be insufficiently explored: How Polish citizens perceive and evaluate politicians as humans rather than the parties or state institutions they represent. The present research concentrates on this very aspect. It focuses both on citizens' overall personal evaluations of politicians, and on their assessments of the politicians' morality and competence (the most probable antecedents of the evaluations). Psychologists analysing social perception processes have already shown that competence and morality (or agency and communion, as they tend to be called nowadays) are the two basic dimension of interpersonal judgement (e.g.: Abele & Wojciszke, 2007; Wojciszke, 1991; 1994; 2005). The morality/communion dimension pertains to one's relations with others. One's morality, e.g. whether or not one is honest, just, truthful, etc., primarily affects the recipient(s) of one's actions rather than oneself. The competence/agency dimension, on the other hand, pertains to one's individual strivings. One's competence, e.g. whether or not one is effective, efficient, intelligent, etc., primarily affects oneself. Therefore, the interpersonal overall judgement is usually predominated by the morality assessment. Even several positive competence characteristics cannot counterbalance a moral one if it is seriously negative. An intelligent, imaginative, and efficient person, for example, is not typically considered to be positive if they are a thief. On the contrary, the more competent the thief should turn out to be, the more negatively they would generally be evaluated.

As demonstrated by Fazio (1990), an attitude, conceived of as an overall evaluation, usually underlies one's behaviour towards the evaluated. Thus, as for the "dialogue" between Polish citizens and politicians, the former's conduct could essentially be due to their attitudes towards the latter. As mentioned above, analysts seem to be particularly concerned about young and well-educated citizens' reluctance to participate in democratic procedures. The present research concentrates therefore on junior intellectuals' attitudes towards politicians and aims to verify two hypotheses. **Hypothesis 1:** The attitudes are not positive as they are primarily determined by the negative assessment of the politicians' morality. Note that this could essentially clarify why so many young (and other) citizens choose to remain democratically inactive. If politicians are not

highly-evaluated because they are generally perceived as immoral (at least in the social-psychological sense, see above), there really seems to be no point in participating in elections. It would amount to voting for the untrustworthy in any case. **Hypothesis 2:** The current political situation, i.e. which party is (and which is not) in power, does not significantly affect the attitudes towards politicians.

Research method

The politicians in question (i.e. the objects of the analysed attitudes) represented three main Polish political parties: PiS (Law and Justice, a right-wing party), SLD (Democratic Left Union, a left-wing party), and PO (Citizens' Platform, a liberal party). In order to verify Hypothesis 2, the study was carried out twice. First in spring 2007 when PiS had been in power for over a year after taking it over from SLD in 2005, and PO had been the most likely winner of the following parliamentary election (to happen, as it turned out, as early as in the autumn of that same year 2007). Then, for the second time, in 2009 when PO had been in power for over a year. Three hundred and eighteen men and women (191 in 2007, and 127 in 2009) at the average age of 26.5 years and representing intelligentsia took part in both parts of the study.

The participants' attitudes were assessed with a standard attitude measure (cf. Fazio 1995), i.e. with a seven-point scale (1 = "extremely negative", 7 = "extremely positive"): "*My overall opinion about politicians representing (PO, PiS, SLD) is …*" – each questionnaire page with a different party name. Similarly, the politicians' perceived morality and competence were both measured with seven-point scales (1 = "not at all", 7 = "absolutely"): "*In my opinion, the politicians representing (PO, PiS, SLD) are ...*" followed by four positive (+) and four negative (-) characteristics (two morality-related (M) and two competence-related (C) in either set): "*truthful*" (+M), "*egoistic*" (-M), "*intelligent*" (+C), "*dishonest*" (-M), "*just*" (+M), "*not resourceful*" (-C), "*clever*" (+C), and "*inefficient*" (-C).

Results and discussion

a) Overall attitude

As hypothesised, the overall attitudes towards politicians were not positive. Even the PO members, though generally perceived far better than the representatives of the other two parties, were not in fact evaluated positively but neutrally at best. The average attitude measure value did not significantly exceed 4, i.e. the middle point on a 7-point scale. Also, as hypothesised, the

attitudes towards representatives of each party were scarcely modified by the political situation. Though the average attitude values in 2007 slightly differed from those in 2009 (see: Table 1), the differences did not reach the standard level of statistical significance (as verified with the *t*-Student test).

Table 1. Overall attitudes towards politicians (a 7-point scale, 1 = "extremely negative"; 7 = "extremely positive")

	Overall attitude towards politicians representing:		
When measured:	PO	PiS	SLD
2009	4.29	2.15	2.96
2007	3.86	2.23	3.11

b) Antecedents of the overall attitudes – the politicians' perceived morality and competence

The mean evaluation of the politicians' truthfulness, egoism, dishonesty, and justness was the measure of their morality. Two variables, "egoistic" and "dishonest", were reverse-coded (i.e. 1 = 7, 2 = 6, 3 = 5, ... 7 = 1), so that the participants' evaluations of the politicians' all morality-related characteristics could be interpreted uniformly. The mean evaluation of the politicians' intelligence, inefficiency, cleverness, and non-resourcefulness was the measure of their competence. Similarly, two variables, "inefficient" and "not resourceful", were reverse-coded.

Even though the politicians representing PO were perceived as more moral and more competent than the representatives of the other two parties, the average evaluations of their morality and competence were again neutral at best. They were also perceived as more competent than moral, and so were those representing SLD (in either case the differences statistically significant, as verified with the *t*-Student test). The politicians representing PiS were perceived as equally moral as competent but in either case less so than those from the other two parties (see: Table 2).

Table 2. Politicians' perceived morality and competence (a 7-point scale, 1 = "not at all"; 7 = "absolutely")

	PO		PiS		SLD	
When measured	morality	competence	morality	competence	morality	competence
2009	4.06	4.43	2.99	2.98	3.19	3.73
2007	3.94	4.46	2.60	2.70	3.17	3.94

In order to find out whether the general opinion is primarily determined by the morality assessment (as postulated in Hypothesis 1), the overall attitude was regressed on the morality and competence measures. The pattern of results was generally concordant with the hypothesised. The overall attitude towards the PiS representatives, however, in 2009 turned out to be dependent on their competence more than on morality, though the difference was minimal. On the other hand, also in 2009, the general evaluation of the PO politicians was apparently independent of their competence but strongly determined by morality (see: Table 3).

Table 3. Overall attitude regressed on morality and competence (β coefficients). All results *-signed statistically significant (p=.02).

	General evaluation of PO predicted by		General evaluation of PiS predicted by		General evaluation of SLD predicted by	
When measured	morality	competence	morality	competence	morality	competence
2009	.69*	-.01	.34*	.35*	.39*	.23*
2007	.36*	.33*	.46*	.18*	.32*	.25*

The results obtained in both parts of the study yield a very convergent pattern. As hypothesised, the participants' attitudes towards politicians did not appear to be positive. Even the PO representatives, who compared quite favourably with those of the other two parties, were in fact evaluated neutrally at best. Also, as predicted, the overall evaluation of the politicians tended to be primarily determined by the assessment of their morality. The only marginal exception was the attitude towards the PiS representatives in 2009 (see above). Thus the present results are consistent with the previous social-perception research on the primacy of morality over competence judgements in overall evaluations of others. Interestingly enough, though for the second time examined in an altered political situation and with a different group of participants, the attitudes towards the three selected parties turned out to be virtually identical, which lends credence to Hypothesis 2.

Conclusion

The present study is a pioneering attempt to view the civil society crisis in Poland, i.e. the problem of citizens' meagre participation in democratic procedures, from the social-psychological perspective. As mentioned above, the previous, mainly sociological analyses, concentrated

primarily on the faulty functioning of the state institutions and citizens' possible reactions. However important those aspects of the relations between politicians and citizens might be, the present findings are very likely to demonstrate the actual reason for the citizens' common withdrawal from the democratic activity. Though not representative of the entire Polish society, the results presented above clearly point to personal, usually far from positive attitudes towards politicians. The attitudes do not seem to be dependent on the current political situation, i.e. which politicians are, and which only aspire to be in power. Instead, the factor most affecting the attitudes turns out to be the politicians' perceived morality (which is in line with the previous social-psychological research on the interpersonal perception and judgement main dimensions, e.g. Abele & Wojciszke, 2007; see above). Thus, the common passivity at the election time does appear to result from the attitudes (cf. Fazio, 1990). Indeed, it seems hardly surprising that so many Poles choose not to vote if they regard politicians as not particularly truthful, just or honest. "There's no point in voting for anyone – you can't trust any of them" – is most probably the passive citizens' opinion (Regulska, 2009). As a matter of fact, ever since 1989, there have definitely been a sufficient number of incidents involving politicians doing their "best" to deserve the negative opinion. Overt cynicism and two-facedness, greed, total incompetence as well as involvement in corruption and nepotism have all sadly been far too often characteristic of representatives of various Polish political parties (Labuda, 2004).

References

1. Abele, Andrea. and Wojciszke, Bogdan. 2007. "Agency and communion from the perspective of self versus others." *Journal of Personality and Social Psychology* 93: 751–763.
2. Cześnik, Mikołaj. 2007. *Partycypacja wyborcza w Polsce. Perspektywa porównawcza* [Participation In democratic procedures in Poland. Comparative perspective].Warszawa: Scholar.
3. Fazio, Russel. 1990. "Multiple processes by which attitudes guide behaviour: The MODE model as an integrative framework." *Advances in Experimental Social Psychology* 23: 5–109.
4. Fazio, Russel. 1995. "Attitudes as object-evaluation associations: Determinants, consequences, and correlates of attitude accessibility" In *Attitude strength: Antecedents and consequences*, Richard E. Petty and Joan, A. Krosnick (eds), 247–282, Hillsdale, NJ: Lawrence Erlbaum.
5. Habermas, Jürgen. 1996. *Between Facts and Norms.* Cambridge: Polity Press,
6. Korkut, Umut. 2005. "The relationship between democratization and invigoration of civil society: the case of Hungary and Poland." *East European Quarterly* 36: 149–177.
7. Labuda, Gerard. 2004. "My i Oni czasu teraźniejszego w perspektywie historycznej i politologicznej." [We and They of today in the historical and political perspective]. In *Kultura polityczna w Polsce* [Political culture in Poland], Marceli Kosman (ed.), 11–33, Poznań: Wydawnictwo Naukowe UAM.
8. Lipiński, Artur. 2004. "Lewica – prawica: specyfika polskiej sceny politycznej czy dylematy uniwersalne?" [The left wing – the right wing: Peculiarity of the Polish political arena or universal dilemmas?] In *Kultura polityczna w Polsce* [Political culture in Poland], Marceli Kosman (ed.), 191–208, Poznań: Wydawnictwo Naukowe UAM.
9. Markus, Maria, Renata. 2001. "Decent society and/or civil society". Social Research 68: 1011–1030.
10. Regulska, Joanna. 2009. "Governance or Self-governance in Poland? Benefits and Threats 20 Years Later." *Journal of Politics, Culture and Society* 22: 537–556.
11. Szumlewicz, Piotr. 2008. "Popularność PO. Kryzys demokracji?" [PO popularity. A democracy crisis?] http://www.polskieradio.pl/krajiswiat/opinie/artykul40877.html (published on August the 10th 2008).

12. Wojciszke, Bogdan. 2005. “Affective concomitants of information on morality and competence.” *European Psychologist* 1: 60–70.
13. Wojciszke, Bogdan. 1994. “Multiple meanings of behaviour: Construing actions in terms of competence and morality” *Journal of Personality and Social Psychology* 67: 222–232.
14. Wojciszke, Bogdan. 1991. Procesy oceniania ludzi *[People evaluation processes]. Poznań: Nakom.*

P. BIRKERTA „PSIHOLOĢIJA” (1921) JAUNU DIMENSIJU KONTEKSTĀ

P. BIRKERTS' "PSYCHOLOGY" (1921) IN THE CONTEXT OF NEW DIMENSIONS

Ināra Leikuma, Mg.psych.
Latvijas Lauksaimniecības universitāte
Neretas 10-119, Jelgava, LV-3002
inaaral@inbox.lv
28225577

Abstract. The article deals with the structure, subjects and topicalities of the first psychology textbook published in Latvia. The acquired information is reviewed in the context of the contemporary science of psychology. "General psychology" (2000) by P. Vorobjovs is used for the text analysis and comparison.
Within the framework of this article an in-depth analysis of the chapter "Feelings and emotions" has been carried out. Also moral feelings have been taken into account.
The research leads to the conclusion that, regardless of the 90 years that separates both of the above mentioned textbooks, they have many similarities. Almost all psychic processes that are important for contemporary psychology can be found also in P. Birkerts' "Psychology". However, in some places there are terminological differences – for example, nowadays – "sense", in P. Birkerts' work – "apprehension". Certain difference can be observed regarding the volume of inspected topics.
P. Birkerts practically omits the history of psychology, whereas in P. Vorobjovs' work this topic is very important. In his turn P. Birkerts pays far more attention to such psychic processes as memory, imagination, feelings, and emotions.
The research leads to the conclusions that the main similarities between these textbooks pertain to psychological topics, whereas the main differences are found in the structure and traditions of scientific work (methods, history). When discussing the main psychological topics, both authors pay attention to the same ideas but the accents are different.
Keywords: P. Birkerts, psychology, contemporary psychology, new dimensions.

Šogad paiet 130 gadi kopš P. Birkerta (1881-1956) dzimšanas un 90 gadi kopš viņa grāmatas „Psiholoģija vidusskolām, skolotāju semināriem un pašmācībai" (1921) izdošanas.

Kā zināms, psiholoģija kā patstāvīga zinātne radās vēlu. Tikai 19. gadsimta vidū, pateicoties V. Vunda eksperimentālajiem pētījumiem, atklājas jaunas cilvēka psihes darbības likumsakarības, kuras nav izskaidrojamas ar fizikas, ķīmijas vai bioloģijas likumiem. 20. gadsimta sākumā, pateicoties P. Birkertam, jaunā zinātne veidojas arī Latvijā.

Protams, jau ilgi pirms tam cilvēki reizumis nodevās introspekcijai un bija pietiekami saprātīgi, lai mēģinātu izzināt psihiskās parādības. Taču tas galvenokārt izpaudās teorētisku spriedumu līmenī. Tā kā garīgais faktors nav precīzi izmērāms un viennozīmīgi izskaitļojams, visu laikmetu praktiķiem, kā arī eksakto zinātņu pārstāvjiem tas šķitis nedefinējams un mazsvarīgs. Katra cilvēka psihiskās izpausmes ir individuālas un tāpēc to neierobežotā daudzveidība ir grūti definējama un iekļaujama zinātniskos „rāmjos".

Būtībā par pirmās psiholoģijas mācību grāmatas autoru var uzskatīt Aristoteli, kura apmēram pirms 2350 gadiem uzrakstītajā darbā „Par dvēseli" dvēsele definēta kā dabas veidota, ar orgāniem apgādāta ķermeņa pirmā entelehija, ar entelehiju saprotot mērķtiecīgu virzītājspēku.

Aristoteliskās tradīcijas dvēseles izpratnē saglabājās vismaz līdz 16. gadsimtam. Vēstures gaitā psiholoģijas priekšmets ticis definēts dažādi. Jēdzieni „dvēsele" un „gars" nereti tika uzskatīti par pārāk filozofiskiem vai reliģiskiem un tātad, nezinātniskiem. Psiholoģijas jēdziena definīcija ir atkarīga no priekšstata par psihi katrā konkrētā laikmetā. Īpašu vietu psihes izpratnē filozofijas ietvaros ieņem Dekarta (1596-1650) mācība par apziņu kā cilvēka iekšējo pasauli, kas ir pretstats materiālajai pasaulei un ir izzināma tikai introspekcijas ceļā. Ar R. Dekartu sākas jauna filozofija, kas cilvēka jautājumu paceļ augstākā līmenī. Veidojas jauna, vispārīga cilvēka teorija, kura balstīta uz empīriskiem pētījumiem un loģiski-matemātiskiem principiem. Šāda pieeja stimulēja vispusīgu cilvēka izpēti, kas savukārt kalpoja par būtisku priekšnoteikumu psiholoģijas kā patstāvīgas zinātnes izveidē.

Mūsdienās ar psiholoģiju tiek saprasta zinātne par cilvēka uzvedību, pārdzīvojumiem un (to abu rezultātā) gūto pieredzi.

Mēģinot izprast mūsdienu cilvēka uzvedību un pārdzīvojumus, varētu piekrist K. G. Junga teiktajam, ka fenomens „mūsdienu cilvēks" sastopams pietiekami reti, jo tādam cilvēkam ir jābūt augstākā pakāpē apzinīgam. Mūsdienu cilvēks ir tas, kurš pilnībā apzinās tagadni un to, ka, ja arī šobrīd viņa attīstība ir sasniegusi kulmināciju, tad jau rīt šīs līmenis var tikt pārspēts. „Šodien" ir tikai starp stāvoklis starp „vakar" un „rīt". Šodienas galvenā misija ir saistīt pagātni ar nākotni. Mūsdienīgumu bieži vien pavada „piepacelta" ilūzija, ka mēs esam vēstures attīstības kulminācija. Varētu teikt, ka jautājumā par indivīda garīguma un pasaules korelāciju dominē Č. Pirsa pragmatisma shēma: cilvēks-darbība-panākums. Par fundamentālo zinātņu paradigmu kļuvis universāls evolucionisms. Tas nozīmē, ka jebkura esamība tiek uzlūkota tikai kā tālākas attīstības instruments, un tagadne – tikai kā tramplīns nākotnei. Attīstība tradicionāli tiek saprasta kā virzība uz priekšu, uz augšu. Arī cilvēks ir daudzu gadsimtu attīstības „produkts", bet diemžēl arī daudzu cilvēces cerību sabrukums.

Šādā noskaņā skatot psiholoģijas zinātnes attīstību Latvijā, par dotā pētījuma **uzdevumu** tiek izvirzīta P. Birkerta un A. Vorobjova mācību grāmatu teksta salīdzināšana un analīze.

Pētījuma mērķis: atklāt, atspoguļot un interpretēt kopīgo un atšķirīgo P. Birkerta „Psiholoģijā" (1921) un A. Vorobjova „Vispārīgajā psiholoģijā" (2000).

P. Birkerts definē psiholoģiju kā „... pārbaudītas, sakārtotas zināšanas par psihi" (Birkerts, 1921). A. Vorobjovs: „..psiholoģija ir zinātne par psihes attīstības likumsakarībām un funkcionēšanu" (Vorobjovs, 2000).

Grāmatas sākumā P. Birkerts skaidro psiholoģijas jēdzienu un tās uzdevumus. Arī A. Vorobjovs sāk ar atbildi uz jautājumu: ko pētī psiholoģija. Taču tālākajā izklāstā redzam būtiskas atšķirības tēmu izvēlē un izvietojuma struktūrā. P. Birkerts turpinājumā nosauc un īsi raksturo psiholoģijas nozares, par kurām var teikt, ka būtībā par tādām runā arī mūsdienu psiholoģija. Tās ir: dzīvnieku psiholoģija, cilvēka psiholoģija, individuālā psiholoģija, diferenciālā psiholoģija, ģenētiskā un sociālā psiholoģija, kā arī teorētiskā un praktiskā psiholoģija. A. Vorobjovs nosauc: darba, pedagoģisko, medicīnas, sporta, juridisko, attīstības, anomālās attīstības, salīdzinošo, sociālo un parapsiholoģiju. Šajā mācību grāmatā psiholoģijas nozaru klasifikācija seko pēc samērā detalizēta ieskata psiholoģijas vēsturē un 20. gadsimta psiholoģijas galvenajos virzienos. Autors raksturo biheiviorismu, geštaltpsiholoģiju, lielu vietu ierāda psihoanalīzei, K. G. Junga un A. Ādlera teorijām. Šie virzieni izveidojas jau 20. gadsimta sākumā, tāpēc grūti saprotams tas, ka P. Birkerta grāmatā tie nekur netiek pieminēti. Jautājumu var attiecināt uz psiholoģijas vēsturi kopumā, jo, neskatoties uz to, ka P. Birkerta grāmata ir apjomīgāka, psiholoģijas vēsture tur praktiski neparādās.

Šeit jāatzīmē vēl viena būtiska atšķirība: mūsdienu psiholoģijas mācību grāmatu ievada daļā parasti nozīmīga vieta ierādīta pētīšanas metodēm. P. Birkerta „Psiholoģijā" šādas nodaļas nav. Tas atkal var izraisīt pārdomas, zinot, ka P. Birkerts pats veicis pētniecisku darbību, vēl vairāk – viņu var uzskatīt par anketēšanas kā pētniecības metodes pamatlicēju Latvijā. Tas gan vairāk saistīts ar to, ka Birkerts ir ne tikai psiholoģijas, bet arī socioloģijas zinātnes izveidotājs Latvijā. Jau 1916. gadā P. Birkerts veic plašu anketēšanu, lai pētītu strādnieku šķiras pasaules uzskatu.

A. Vorobjova grāmatas pirmajā nodaļā ietverts paragrāfs par psihi kā psiholoģijas pētīšanas priekšmetu, par tās veidošanos un attīstību. Autors skata psihes filoģenētisko attīstību, tas ir, psihes attīstības stadijas saistībā ar nervu sistēmas attīstību, kas izpaužas kā sensorā, perceptīvā, intelektuālā psihe un apziņa kā psihes augstākā, tikai cilvēkam piemītošā stadija.

Ar apziņas saturu A. Vorobjovs saprot izziņas, emocionālo un individuāli tipoloģisko sfēru. Tālāk seko samērā plašs ieskats jautājumos par pašapziņu, tās struktūru, funkcijām, kā arī bezapziņas struktūru un funkcijām.

Gan P. Birkerta, gan A. Vorobjova grāmatu otrā nodaļa veltīta izziņas procesu atspoguļošanai. Mūsdienu mācību grāmatā nodaļā kognitīvās psiholoģijas pamati tiek iekļauti jautājumi par sajūtām, uztveri, domāšanu un runu, iztēli un jaunradi, uzmanību un atmiņu.

P.Birkerts zem nosaukuma" Intelekta jeb prāta elementi un pamatnoteikumi" runā par sajūtām, apziņu, interesi, uzmanību. Tālāk seko grāmatas trešā daļa ar nosaukumu" Intelekta jeb prāta psiholoģija", kurā ietverti tādi jautājumi kā nojauta, apercepcija, asociācija, atmiņa, iedomas spēja jeb iztēle, domāšana, intuīcija. Kā redzams, apskatāmo jautājumu loks abiem autoriem ir līdzīgs. Atšķiras tēmu izvietojums nodaļās, izklāsta apjoms un akcenti. Kā jau minēts, A. Vorobjovs ievada daļā detalizēti skata psihi un apziņu, savukārt P. Birkerts apziņu iekļauj izziņas procesu grupā un saka, ka „apziņas lielā vienkāršība dara to grūti definējamu" (Birkerts, 1921). Acīmredzot šāds secinājums radies tāpēc, ka autors apziņas problēmu skata samērā šauri, ar apziņu saprotot „tādu psihes īpašību, kura psihei dod iespēju nojaust un zināt savu stāvokli un savas rosības, aktivitātes, apzināt sevi pašu(ap-ziņa)" (Birkerts, 1921).

Šī raksta ietvari neparedz augstākminēto grāmatas nodaļu, kā arī personības individuāli tipoloģisko īpašību izvērstu salīdzinājumu un vērtējumu. Turpmāk tekstā tiks plašāk apskatīta jūtu un emociju problēma, pie tam akcentējot morālās jūtas.

Abu autoru darbos izziņas procesu izklāstam seko nodaļa par jūtām un emocijām. P. Birkertam tā ir grāmatas ceturtā nodaļa ar nosaukumu „Jūtu psiholoģija". A. Vorobjovam – grāmatas trešā nodaļa „Personības un gribas sfēra". Jāatzīmē, ka P. Birkerta grāmatā šī ir viena no apjomīgākajām nodaļām un aizņem 80 lappuses. Salīdzinājumam – A. Vorobjova grāmatā tās ir 13 lappuses. Iespējams, tas skaidrojams ar P. Birkerta empīriskajiem pētījumiem latviešu tautas folkloras jomā, mīlestības psiholoģijā, daiļradīšanas psiholoģijā, kā rezultātā autors operē ar ļoti bagātu faktu materiālu un krāsainiem piemēriem jūtu sfēras raksturošanai.

Jūtu jēdziena izklāstā abās mācību grāmatās vērojamas samērā būtiskas atšķirības.

Mūsdienu psiholoģijā sākotnēji tiek skaidrots jūtu un emociju jēdziens, ar jūtām saprotot subjektīvo pasaules vērtēšanas sistēmu, bet ar emocijām – "jūtu priekšmetu subjektīvo vērtējumu aktualizācijas procesu" (Vorobjovs, 2000). Būtiskākās atšķirības šo jēdzienu lietošanā saistās ar ilgstamību: jūtas ir stabilākas un ilglaicīgākas, emocijas – spilgtākas un īslaicīgākas, kā arī šo procesu saistību ar nervu sistēmu, kur emocijas tiek skatītas saistībā ar smadzeņu darbību kā fizioloģisko norišu sekas, kas vērojamas arī citām dzīvām būtnēm, savukārt jūtas ir sociālas un specifiski „cilvēciskas".

Birkertam „jūtas ir psihisko rosību internais jeb iekšējais aspekts, zinams psihes stāvoklis, noteikums" (Birkerts, 1921). Par galvenajiem jūtu elementiem autors uzskata pieredzējumu, pieredzējuma vērtēšanu, pieredzējuma vērtības nojautu un attiecīgo psihes stāvokli. „Jūtas ir tāds psihes stāvoklis, kurš rodas, psihei izmanot pieredzējuma vērtību priekš sevis" (Birkerts, 1921). Jušanas procesa būtība ir vērtēšana. Otrajā nodaļā P. Birkerts izdala jūtu veidus, īpašības un

funkcijas. Jāsaka, ka tas ir tikai viens no iedalījumiem. Arī tālāk tekstā jūtas tiek dalītas un klasificētas pēc dažādiem kritērijiem.To var uztvert kā interesantu lasāmvielu, taču šāds stils mācību grāmatā var sagādāt grūtības vielas izpratnē un apguvē.

Mūsdienu psiholoģijā jūtas dala augstākajās un zemākajās. Arī P. Birkertam tālāk tekstā šāds dalījums parādās, bet sākumā viņš izdala trīs jūtu veidus: tīksme vai bauda, netīksme, vienaldzība. P. Birkerta skaidrojumā tīksme un netīksme interpretēta līdzīgi kā A. Vorobjova grāmatā zemākās jūtas. „Zemākās jūtas saistītas ar priekšmetiem, kuri apmierina cilvēka dabiskās vajadzības (ēdiens, ūdens, siltums, utt.)" (Vorobjovs, 2000). Par vienaldzību Birkerts gan saka, ka absolūtas indiferences jūtās nav, tomēr iespējamas situācijas, "kad psihe pieredzējumā neizredz sevim nekādas vērtības..." (Birkerts, 1921). Vērojot mūsdienu sabiedrībā valdošās norises un morālo vērtību devalvāciju, diemžēl jāatzīst, ka vienaldzība ir samērā izplatīts psihiskais stāvoklis.

A. Vorobjovs kā galvenās jūtu īpašības nosauc: polaritāti, ambivalenci, intensitāti, stēniskumu un astēniskumu. P. Birkertam jūtu īpašības – kvalitāte, intensivitāte jeb sparība, ilgums. Redzam, ka uzskaitījums ir atšķirīgs, izņemot tādu īpašību kā intensitāte. A. Vorobjovs pēc intensitātes jūtas iedala stiprās, vājās un vētrainās, intensitātes pakāpi saistot ar cilvēka individuālajām īpašībām: nervu sistēmas tipu, temperamenta un gribas īpašībām. Pārdzīvojuma intensitāti mūsdienu mācību grāmatās vairāk skata emociju kontekstā, nosaucot jūtu toni, afektu, stresu, kaislības, garastāvokli. P. Birkerts runā par jūtām vārda plašākā un šaurākā nozīmē. „Jūtas vārda plašākā nozīmē aptver visus un visādus jūtu stāvokļus: no impresijām un noskaņām līdz kaislībām. Jūtas vārda šaurākā nozīmē ietver emocionālos stāvokļus, kas spēka, stipruma ziņā ir spēcīgāki un ilgāki par noskaņām" (Birkerts, 1921). Jūtu intensitāti autors skata plašāk un izmanto kā vienu no kritērijiem jūtu iedalījumam: impresijās jeb ieskaņās, noskaņās, jūtās vārda šaurākā nozīmē, emocijās, afektos, kaislības. Šeit interesi izraisa tādi jēdzieni kā ieskaņas un noskaņas. „...ieskaņas ir tikko manamas vieglas jūtiņas, kuras ilgst tikai īsu brītiņu" (Birkerts, 1921). Līdzīgi arī noskaņas ir vieglas un īslaicīgas. „Ja ieskaņa ir dzirkstele, tad noskaņa ir maza uguntiņa nakts tumsā" (Birkerts, 1921). Šeit P. Birkerts izsaka interesantu spriedumu par jaunlaiku cilvēku: „Sevišķi noskaņu pasaule ir bagāta jaunlaiku cilvēkam ar viņa attīstīto, izsmalcināto psihi. Modernā psihe var tamdēļ vairāk noskaņu radīt, ka viņa: 1) jūtīgāka, maigāka, uztveršanas spējīgāka; 2) ka viņai lielāks domu un ideju krājums, bet ap katru ideju vijas noskaņu un jūtu stīgas; 3) ka modernā pilsētu, rūpniecības, saimnieciskā, sabiedriskā un kulturelā dzīve daudz bagātāka un dažādāka par agrāko vienmuļo lauku dzīvi; 4) ka dzīves plūdums straujāks, dzīves pulss ātrāks, notikumi raibu raibā mudžeklī joņo uz priekšu, un tagad cilvēks īsā brīdī pārdzīvo tik daudz, kā agrāk viņš pārdzīvoja gados un gadu desmitos. Pārdzīvojumu lielā bagātība psihei neļauj pie katra no tiem

kavēties ilgi, bet tikai īsus brīžus. Ronas ne ilgas jūtas, bet tikai noskaņas" (Birkerts, 1921). Salīdzinot ar to, ko redzam šodien, šķiet, ka viennozīmīgi varētu piekrist tikai ceturtajam punktam, bet par to, vai mūsdienu cilvēks kļuvis jūtīgāks, maigāks un idejām bagātāks, īstas pārliecības diemžēl nav.

Atšķirība no mūsdienu psiholoģijas vērojama arī jautājumā par saistību starp sajūtām un jūtām. Var piekrist Birkerta domai par to, ka katrai sajūtai ir trīs aspekti: intelektuālais jeb prāta, emocionālais jeb jūtu un gribas jeb darbības. Sajūtas sniedz vielu prātam, kurš to pārvērš idejās, un gribai, kas pārvērš to darbībā. Pie tam sajūtas ierosina psihē tīksmi vai netīksmi, ciešanas vai baudu – sajūtu emocionālo aspektu. Tas nozīmē, ka katrā sajūtā ir jūtu elementi. Arī šeit redzam, ka autoram nav īstas konsekvences jēdzienu *jūtas* un *sajūtas* lietošanā. Tiesa, P. Birkerts atzīmē to, ka nereti jēdzieni *jūtas* un *sajūtas* tiek identificēti vai pat lietoti kā sinonīmi. Viņš raksta, ka šiem procesiem ir kopīgas īpašības – kvalitāte, intensivitāte, ilgums, bet ir arī atšķirības. Autors gan nemin būtiskāko atšķirību – sajūtas ir izziņas process, jūtām pamatā ir vērtējošā funkcija.

Izvēršot jautājumu par jūtu funkcijām, Birkerts raksta, ka: 1) jūtas ir mūsu dzīvības galvenais sargs. „Sāpes ir zīme, ka organisms tiek bojāts...Viņas ir arī signāls un palīgā saucieni... Bauda savukārt ir zīme, ka organismā viss kārtībā" (Birkerts, 1921). „Ja jūtu nebūtu, tad organisms un dzīvās būtnes drīz aizietu bojā. Piemēram, piespiežoties pie karstas dzelzs, mēs nemanītu, ka nodeg mums locekļi; karā neievērotu, ka esam ievainoti un noplūstam asinīm." (Birkerts, 1921). Taču šādā interpretācijā sāpes būtu jāsaprot kā sāpju sajūtas, nevis jūtas. 2) Jūtas ir galvenais dzinējspēks. Viņaprāt, cilvēka rīcību biežāk vada jūtas, nevis prāts. Pie tam to var teikt ne tikai par atsevišķu indivīdu, bet pat par veselām tautām, masām: „...visas lielākās sabiedriskās kustības, visasiņainākie kari, lai arī tie ietu zem kādiem karogiem un ar kādiem ideāliem un lozungiem iedami, notiek tikai pacilātu, sakustinātu jūtu stāvoklī, notiek zem kaislību spiediena un jūtu varenā plūdumā" (Birkerts, 1921). 3) Jūtas ir vērtību mēraukla, kritērijs.

A. Vorobjova „Psiholoģijā" jūtu funkcijas atsevišķi netiek apskatītas, vien cita starp pieminēts, ka jūtas kalpo kā cilvēka darbību rosinošs motīvs un subjektīvs vērtējums.

Tālāk P. Birkerts ļoti plaši skaidro individuālās un sociālās jūtas. A. Vorobjova grāmatā šāda dalījuma nav.

Individuālo jūtu uzskaitījums ietver sevī daudz interesantu, personību raksturojošu pazīmju. Tās ir pasīvās pašaizsardzības jūtas – bailes, šausmas, aktīvās pašaizsardzības jūtas – naids, dusmas, atriebība, attīstības un pašizplatības jūtas – sacīkstes, cīņas, varas, cietsirdības, pašvērtības jūtas – gods, lepnums, slavas kāre, uzpūtība. Autors skaidro šo jūtu būtību, veidus, cēloņus. Piemēram, raksturojot dusmas, P. Birkerts raksta: „asinstrauki izplešas, seja piesarkst, lielās vēnas

uz sejas un pieres pietūkst. Pārāk spēcīgos dusmu brīžos daži asinstrauki var pat plīst, var sākties asinsnoplūšana no deguna, plaušām. Var iestāties pat nāve.... Balss paliek aizsmakusi, kērkstoša. ...Elpošana nevienāda, nāsis plati ieplešas. Zobi sakniebti un parasti atņirgti" (Birkerts, 1921). Interesanti, ka naids šeit tiek interpretēts kā civilizēta, intelektualizēta dusmu forma. Kopumā tikai dusmu raksturojumam mācību grāmatā atvēlētas sešas lappuses. P. Birkerts atzīst, ka katrai emocijai ir divas puses: psihiskā un fizioloģiskā. Atsevišķu, īpaši individuālo jūtu raksturošanai, autors nereti izmanto spilgtus fizioloģisko izpausmju raksturojumus. Salīdzinājumam jāatzīmē, ka šis aspekts samērā plaši atspoguļots arī A. Vorobjova grāmatā, kur tam veltīta atsevišķa nodaļa – emocionālie stāvokļi un fizioloģiskie procesi (Birkerts, 1921).

Jau minējām, ka P. Birkerts jūtas klasificē ļoti detalizēti. Ņemot par pamatu jūtu „audumu" un struktūru, autors runā par zemākajām un augstākajām jūtām. Taču tālākais tēmas izvērsums ļoti būtiski atšķiras no A. Vorobjova interpretācijas. P. Birkerts ar zemākajām jūtām saprot jūtas, kuras saistītas ar sajūtām un tās ir redzes, dzirdes, taustes, garšas, ožas, kontakta, temperatūras, sāpju maņas. Arī šīm jūtām raksturīgas kopējās jūtu īpašības: kvalitāte, intensitāte, ilgums, tīksme un netīksme.

Attiecībā uz augstākajām jūtām A. Vorobjova „Vispārīgajā psiholoģijā" minētas morālās, intelektuālās, estētiskās un praksiskās jūtas.

Jautājumu par augstākajām jūtām P. Birkerts skata ļoti plaši, izdalot individuālās jeb patības, sociālās jeb sabiedriskās, ētiskās jeb tikumiskās, intelektuālās jeb prāta, estētiskās jeb daiļuma un reliģiskās jūtas (Birkerts, 1921).

Skatot morālās jūtas, A. Vorobjovs nosauc: pienākuma, atbildības, draudzības, mīlestības, patriotisma, jūtas, sīkāk pakavējoties pie draudzības jūtu skaidrojuma. Interesanti, ka P. Birkerts, runājot par morālajām jūtām, mīlestību un draudzību pat nenosauc. Zinot autora pētījumus, kas apkopoti grāmatā „Mīlestības psiholoģija", grūti izskaidrot, kāpēc mācību grāmatā, kura paredzēta jauniem cilvēkiem, šāda visnotaļ aktuāla tēma netiek apskatīta.

Birkerts. „Ētiskās jeb tikumiskās jūtas ir jūtas pret zināmā laikā un zināmā sabiedrībā atzītu labu vai ļaunu darbību" (Birkerts, 1921).

A. Vorobjovs. Morālās jūtas „..ir pienākuma, atbildības, draudzības, mīlestības, patriotisma, jūtas utt. Šo jūtu pamatā ir sabiedrisko interešu un savu saistību attiecībā pret sabiedrību apzināšanās" (Vorobjovs, 2000). Redzam, ka abi autori akcentē saikni ar sabiedrību.

Birkerts īpaši akcentē morālo jūtu sociālo dabu, uzskatot, ka par tikumību var runāt tikai cilvēku savstarpējo attiecību un darbības sakarā. Attiecībās ar dabu cilvēks nav ne tikumīgs, ne netikumīgs (piemēram, peldoties, vērojam saulrietu vai elpojot). Iespējams, ka no psiholoģijas

skatu punkta tam varētu piekrist, taču mūsdienu ētikas problēmu kontekstā cilvēka attieksme pret dabu ietver sevī plašu ētisko problēmu loku. Arī attieksme pret sevi pēc P. Birkerta domām nav saistīta ar tikumību. Cilvēks guļ, ēd, staigā un tikumiskajai apziņai ar to nav nekāda sakara, ja vien šī izturēšanās nekaitē līdzcilvēkiem un sabiedrībai. Runājot par to, vai attieksmē pret sevi atrodami morālie aspekti, noteikti pastāv iespēja oponēt, bet atgriežoties pie pētījuma mērķa, jāatzīmē, ka A. Vorobjovs šādu aspektu neizvērš, un kopumā morālo jūtu traktējumā ētikas kategorijas neiekļauj. Savukārt P. Birkerts atsaucas uz ētikas normām, ar tām saprotot labā un ļaunā kritērijus. „Ētiskās jeb tikumiskās attiecības ir tādas sociālās attiecības, kuras veicina sabiedrības labklājību un kuru uzturēšanai sabiedrība lieto tikai tīri psihisku spaidu, savas simpātijas un antipātijas" (Birkerts, 1921). Te autors izsaka interesantu spriedumu par to, ka būtībā ētiskās normas un laba un ļauna jēdzieni ir mainīgi, atkarīgi no vēsturiskajiem apstākļiem un attiecīgās sabiedrības tradīcijām. Taču tas nemaina pašu ētisko jūtu struktūru. „Viņas neprasa, kas katrā laikā ir šis labs un ļauns, ..., kur viņš gadās, bet tiklīdz viņš ir, viņas pret to ieņem zināmu stāvokli" (Birkerts, 1921). Nosaucot ētisko jūtu šķiras, P. Birkerts min pienākuma jūtas, sirdsmieru, nožēlošanas jūtas, pašpārmetuma jūtas. Tātad pienākuma jūtas ir tās, kuras atrodamas abās klasifikācijās. Birkerts sāk ar ļoti interesantu teikumu: „Pienākuma jūtas ir jūtas, ko cilvēks jūt pret pienākumu" (Birkerts, 1921). Vorobjovam pienākuma jūtas ir savu saistību attiecībā pret sabiedrību apzināšanās un to dziļš pārdzīvojums. Saistībā ar pienākumu abi autori skar tādu būtisku kategoriju kā sirdsapziņa. Mūsdienu mācību grāmatā sirdsapziņa ir cilvēka rīcības pašvērtējuma rezultāts. P. Birkerts par sirdsapziņu runā plašāk, uzskatot to par visu tikumisko jūtu „kopaudumu". Viņaprāt, sirdsapziņai ir sociāls raksturs, jo katra sabiedrība izveido savas tikumiskās normas, pie kurām pieradina indivīdu. „Ja sabiedrība saka: ir labi nokaut vecākus, Jaun-Kaledonijas iedzīvotājs tos nokauj, un sirdsapziņa tam liek mieru..." (Birkerts, 1921). Tādējādi sirdsapziņa ir sabiedrības balss cilvēkā. Šādā izpratnē tomēr zūd indivīda pašvērtējuma un atbildības aspekts. Taču, vērtējot ētiskās jūtas, Birkerts tomēr akcentē to, ka skaistākās ir tās jūtas, kuras plūst brīvi – cilvēks nezog ne tāpēc, ka to nedrīkst un ka par to var saņemt sodu, bet gan tāpēc, ka tāda ir viņa pārliecība. Kā zināms, ētikā šādā kontekstā mēdz runāt par morāles autonomo un konvencionālo līmeni. Noslēgumā abi autori uzsver audzināšanas lomu jūtu veidošanā. A. Vorobjovs ļoti īsi raksturo pārējos jūtu veidus, sakot, ka intelektuālās jūtas rodas izziņas darbībā, praksiskās, pārdzīvojot darbības procesu, estētiskās – saskaroties ar mākslu, dabu. P. Birkerta grāmatā šiem un arī citiem jūtu veidiem veltīts plašs izklāsts. Sīkāka P. Birkerta mācību grāmatas teksta interpretācija un analīze nav savienojama ar šī raksta iespējamo apjomu, kā arī mērķi un uzdevumu.

Pētījums ļauj secināt, ka:

1. P. Birkerta „Psiholoģija” (1921) un A. Vorobjova „Vispārīgā psiholoģija” (2000) pārstāv atšķirīgus sabiedrības un psiholoģijas zinātnes attīstības posmus. Kā rezultātā nav pamata runāt par to, ka kāda no šīm grāmatām būtu vairāk vai mazāk kvalitatīva.
2. Psihes izpratne, psihisko procesu uzskaitījums, personības individuāli tipoloģisko īpašību atspoguļojums abu autoru mācību grāmatās ir līdzīgs.
3. Atšķirības vērojamas apskatāmo jautājumu izklāsta shēmā , kā arī terminos un jēdzienos.
4. Var runāt par atšķirīgiem akcentiem. Piemēram, A. Vorobjovs plašāk skata apziņas problēmu, temperamenta jēdzienu, kā arī piedāvā praktiskus uzdevumus, savukārt P. Birkerts izvērš jautājumu par jūtām un izziņas procesiem.
5. Grūti izskaidrot, bet jāsecina, ka P. Birkerta grāmatā nav skarti tādi mācību grāmatai būtiski jautājumi kā psiholoģijas vēsture un pētīšanas metodes.

Izmantoto literatūras avotu saraksts

1. Birkerts P. Psicholoģija. Vidusskolām, skolotāju zemināriem un pašmācībai. Rīga, 1921. 263 lpp.
2. Vorobjovs A.Vispārīgā psiholoģija. Rīga, 2000. 212 lpp.

FILOZOFIJAS LOMA MŪSDIENU SABIEDRĪBĀ

THE ROLE OF PHILOSOPHY IN CONTEMPORARY SOCIETY

Leonards Leikums, *Dr. phil.*, LLU SZF Filozofijas katedra, Jelgava, Lielā iela 2, e-pasts leonards.leikums@llu.lv, t. 63005649
Gunārs Brāzma, *Dr. phil.*, LLU SZF Filozofijas katedra, Jelgava, Lielā iela 2, e-pasts gbrazma@latnet.lv, t. 63005649

Abstract. The paper considers philosophy as a comprehensive system developing together with society. Philosophy can be considered either from substantional (essential) point of view or from functional point of view. Axiological function, critical function and prognostic function are the major functions of philosophy in contemporary society. Function of developing an individual's world-view, methodological function, integrative function and therapeutic function are also significant. Philosophy promotes creative and critical thinking, develops value orientation in education.
Nowadays together with the theoretical aspects of philosophy its practical orientation consisting mainly in ethical dimensions is of growing importance. The attitude of Latvian society towards morality and ethics is still strongly influenced by the decades of Soviet occupation. At the same time, the influence of the Western consumer culture has increased since Latvia regained independence. Further research is necessary on Latvian society's attitude towards moral and ethical issues, as well as on the role of the ethics courses in Latvian schools and universities.
Although the contemporary philosophy of education emphasizes approaches of virtue ethics and character education, it would be wrong to deny the significance of ethical knowledge and understanding, which is the major component of ethics courses. One of the problems making the teaching of ethics more difficult is the widespread attitude of simplified moral relativism in the contemporary society. This attitude results in avoiding rational discussions on ethical issues. Nevertheless the rational analysis of ethical problems is necessary because it develops skills of argumentative discussions and the understanding of ethical concepts, as well as teaches one to avoid conformism, simplified clichés and ideological manipulation.
Key words: functions of philosophy, contemporary society, education, morality, ethics.

Ievads

Domājot par filozofijas lomu mūsdienu sabiedrībā, vispirms jāpievērš uzmanība filozofijas sākotnei. Kāpēc radās filozofija? Varbūt tā nevis radās, bet pastāvēja un attīstījās līdz ar cilvēka domāšanas attīstību? Ja pieņemam, ka filozofija sakņojas domāšanas sākotnē un ka tā funkcionē ne tikai konceptuālās formās, bet var izpausties arī jutekliski tēlainās, vizuālās formās, tad filozofijai var piešķirt absolūtu nozīmi tajā ziņā, ka filozofiskā doma var formēties visdažādākajos domāšanas līmeņos, sākot ar pirmatnējā cilvēka sapratnes visvienkāršākajiem atspoguļojumiem, līdz pat mūsdienu cilvēka prāta visabstraktākajiem konstruktiem. Šādā skatījumā filozofija kā filozofisku domu veidošana un izteikšana funkcionē visdažādākajos cilvēka domāšanas diskursos – gan mitoloģiskā, gan mākslas un reliģijas, gan arī indivīda un kolektīvās pieredzes diskursā –, atspoguļojot lietas un to sakarības vispārīgā veidā, piedāvājot atziņas, kas der daudzām dzīves situācijām un veido gudrības pamatu (Гурина, 1998, 108-137).

Turpretim, ja filozofiju skata zinātnisko atziņu diskursā, tad Eiropā tā konstituējās tikai VI gadsimtā pirms mūsu ēras. Šādā skatījumā filozofija, kas pretendē uz likumu atklāšanu un

universālu atziņu veidošanu par pasauli, skatāma kā sistēma un vērtējama ar noteiktiem filozofiju raksturojošiem kritērijiem: virziens, metode, skola, filozofs u.c.

Filozofija savā gadu tūkstošus ilgajā attīstībā atklāj sevi visdažādākajās izpausmēs: gan teorētiskajās, gan praktiskajās formās, gan saiknēs ar mitoloģiju un reliģiju, mākslu un zinātni, gan cilvēka gudrības un dzīvotmākslas raksturojumos.

Filozofijas loma sabiedrībā nav apšaubāma. Diskutēt var vienīgi par to, kādā veidā šo lomu un nozīmi atspoguļot. Var vērst uzmanību uz pašu svarīgāko, uz galveno, būtisko filozofijā – skatīt filozofiju substancionāli. Bet var arī dot izvērstāku skatījumu – aplūkot filozofiju funkcionāli. Tā saucamā substancionālā pieeja atklāj vienoto daudzajā, bet funkcionālā pieeja atklāj daudzo vienotajā. Tā vai citādi, abas pieejas viena otru papildina. Jāatzīmē, ka substancionālā pieeja tāpat kā funkcionālā nedod viennozīmīgu rezultātu, jo filozofijas būtību var izteikt dažādi. Un katrā no atbildēm būs daļa patiesības. Vai var šodien apšaubīt antīkajā filozofijā populāro atziņu, ka filozofija ir gudrības mīlestība? Un vai vajag apšaubīt Aristoteļa uzskatu, ka filozofija ir zinātne par būtību, cēloņiem, sākumiem? Filozofija vienmēr bijusi saistīta ar gudrību, tādējādi uzturot saikni ar cilvēka praktisko darbību. Tāpat arī filozofija vienmēr bijusi saistīta ar relatīvi pastāvīgā, nemainīgā, būtiskā atklāšanu, uzturot saikni ar zinātņu atklātajiem likumiem un likumsakarībām.

Raksturojot filozofijas lomu mūsdienu sabiedrībā, nepietiek pievērst uzmanību kādai vienai filozofijas iezīmei vai funkcijai. Ņemot vērā to, ka filozofijai ir sazarota struktūra (nozares, virzieni, metodes), filozofijas loma izpaužas visai daudzveidīgi. Turklāt filozofija attīstās, un tas atspoguļojas filozofijas lomas izmaiņās.

Vai var pieņemt par patiesu tēzi, ka filozofijas loma sabiedrībā palielinās? Skatot un vērtējot filozofiju sabiedrības attīstības gaitā, var secināt, ka filozofijas loma sabiedrībā mainās līdz ar konkrētu vēsturisko apstākļu maiņu. Precīzāk – mainās filozofijas funkcijas. Ir laikmeti, kad skaidri redzams filozofijas lomas pieaugums (VI – IV gs. p.m.ē. Senajā Grieķijā, renesanses laikmets, XVIII gs. apgaismības laikmets). Jāatzīmē, ka filozofijas loma parasti ir palielinājusies tad, kad sabiedrībā ir izveidojusies krīzes situācija, kā tas pašlaik ir arī mūsdienu Latvijā. Šādā situācijā filozofiskai domai jānorāda uz iespējām krīzi pārvarēt.

Kā ir ar filozofiju mūsdienās? Neapšaubāmi, vairāk vai mazāk izsmeļošas atbildes meklējumi saistās ar dažādu sabiedrības attīstības determinanšu izvērtēšanu mūsdienu sabiedrības samērā vienotajā, bet vienlaikus tik daudzveidīgajā attīstībā. Kā filozofija iekļaujas pasaules ekonomiskajās un politiskajās kustībās? Kā filozofija iekļaujas zinātnes un tehnikas un ar to saistīto tehnoloģiju attīstībā? Kā filozofija veicina garīgās kultūras attīstību? Vai filozofija ieņem pietiekami svarīgu vietu izglītībā? Vai filozofijas studiju kursi universitātēs ir jāmāca kā obligāti?

Vai filozofija ir nepieciešama mākslā, biznesā, sportā u.c.? Atbildes uz šādiem jautājumiem ir iespējamas tikai apjomīgu pētījumu rezultātā.

Raksta mērķis – sniegt filozofisku refleksiju par filozofijas lomu mūsdienu sabiedrībā, uzsverot ētisko dimensiju.

Filozofijas funkcijas mūsdienu sabiedrībā

Mūsdienu sabiedrībā filozofija pilda vairākas funkcijas. Svarīgākās no tām ir izziņas funkcija, prognostiskā funkcija, pasaules uzskata veidošanas funkcija, metodoloģiskā funkcija, integrējošā funkcija, kritiskā funkcija un aksioloģiskā funkcija (Бучило, Чумаков, 2001, 35-39; Кокановский (Ред.), 2003, 5-26; Канке, 2005, 9-25; Крапивенский, 1998, 3-11; Степин, 2009). Mūsdienās aizvien vairāk tiek runāts arī par filozofijas terapeitisko funkciju (sk. Philosophy as Therapy – Introduction).

Izziņas funkcija izpaužas, atklājot pasaules vispārīgākās sakarības un racionālā veidā izskaidrojot pasauli. Filozofija veido jaunus jēdzienus, izstrādā hipotēzes, jaunas koncepcijas un teorijas. Filozofija uzsver patiesību kā vērtību. Izziņas aspektā mūsdienu filozofijā jūtams jaunu, oriģinālu koncepciju trūkums. Izziņas funkcijas pavājināšanās skaidrojama ar strauju zinātnes attīstību. Filozofiskās izziņas problemātiku lielā mērā ir pārņēmušas citas zinātnes (Hesle, 2011, 1-27).

Līdztekus izziņas funkcijai filozofijā skatāma **prognostiskā funkcija**, kas izpaužas dabas attīstības, sabiedrības attīstības un izziņas attīstības prognozēšanā. Dabas attīstības prognozēšana pamatā notiek evolūcijas teorijas kontekstā, izmantojot jaunākos dabaszinātņu atklājumus. Sabiedrības attīstības prognozēšana izpaužas galvenokārt brīdinājumos par iespējamiem draudiem un riskiem. Filozofi reti nodarbojas ar pareģošanu. Sociālās prognozes norāda tendences, kas negatīvi iespaido sabiedrības funkcionēšanu un attīstību. Tās tiek izteiktas varbūtības formā. Sabiedrībai destabilizējoties, vajadzība pēc prognozēm pieaug. Sociālās prognozes vairāk īstenojas slēgta tipa sabiedrībās nekā atklātajās sabiedrībās. Tas izskaidrojams ar to, ka tiek veikta totāla varas kontrole pār sociālajiem procesiem. Pēc būtības slēgtajās sabiedrībās attīstība tiek noteikta ar varas mehānisma palīdzību.

Savukārt izziņas attīstībā filozofijas prognostiskā funkcija izpaužas divējādi: kā filozofijas refleksija par gaidāmajiem zinātņu atklājumiem un kā hipotēžu, koncepciju veidošana filozofijas kontekstā.

Pasaules uzskata veidošanas funkcija. Šī funkcija izpaužas zināšanu un uzskatu sistematizēšanā par pasauli. Pasaules uzskats ir vispārinātu atziņu sistēma par pasauli, kas izpaužas noteiktās vērtīborientācijās un īstenojas cilvēka darbībā (Vedins, 2008, 109). Cilvēku apziņā

pasaules uzskats darbojas kā integrējoša sistēma, kas vieno individuālo un sabiedrisko apziņu. Tam ir liela nozīme cilvēka vērtīborientācijā un praktiskās darbības regulācijā.

Kāda loma pasaules uzskatā ir filozofijas zināšanām? Atkarībā no pasaules uzskata pamatformām un veidiem filozofijas zināšanas pasaules uzskatā spēlē atšķirīgu lomu. Vēsturiski izveidojušās trīs pasaules uzskata pamatformas: mitoloģiskais pasaules uzskats, reliģiskais pasaules uzskats un filozofiskais pasaules uzskats. Bez šīm pasaules uzskata pamatformām izšķir arī pasaules uzskata veidus: politiskais, tiesiskais, dabaszinātniskais, estētiskais u.c. pasaules uzskata veidi. Mūsdienu sabiedrībā aktuāls ir filozofiskais pasaules uzskats, kur filozofijas uzskatiem un zināšanām ir svarīga loma. Tās funkcionējot veido vai nu pasaules uzskata pamatu, vai arī atrodas pasaules uzskata centrā.

Metodoloģiskā funkcija. Filozofijas metodoloģiskā funkcija izpaužas galvenokārt zinātniskā izziņā un ar to saistītā praktiskā darbībā. Filozofiju un zinātni vieno kopīgais. Proti, gan filozofijai, gan zinātnei ir kategoriālais aparāts, raksturīga racionalitāte, orientēšanās uz likumu un likumsakarību atklāšanu, tiekšanās veidot viengabalainas konceptuālas sistēmas. Līdztekus kopīgajam vērojams arī atšķirīgais. Proti, mūsdienu zinātnē prevalē kolektīvais darbs, bet filozofijā joprojām pārsvarā – individuālais darbs ar tendenci filozofa pašpietiekamai darbībai. Ja zinātnē mūsdienās vairums teorētisku atziņu ir empīriski verificējamas, tad filozofiskās atziņas empīriskai pārbaudei vairumā gadījumu nepakļaujas. Zinātne daudzās pētījumu jomās dod samērā precīzas prognozes. Par filozofiju to nevar teikt. Tādējādi filozofiju nevar uzskatīt par zinātņu zinātni.

Filozofijas metodoloģiskā funkcija izpaužas noteiktā, samērā konkrētā zinātniskās izziņas aspektā. Pirmkārt, jautājumā par metodēm un to pielietošanu. Filozofijā tiek izmantotas vairākas metodes: dialektikas un metafizikas metode, analīze, sintēze, indukcijas metode, dedukcijas metode, hermeneitikas metode, fenomenoloģiskā metode, konceptuālās modelēšanas metode, aprakstīšanas metode u.c. Filozofija ne tikai izstrādā un pilnveido metodes, bet pēta arī metožu pilnveidošanas nosacījumus: aspektus, diskursus, pieejas, metožu subordināciju un koordināciju, metožu klasifikāciju u.c. Otrkārt, filozofijas metodoloģiskā funkcija izpaužas zinātniskās izziņas kategoriālās struktūras izstrādē. Filozofija piedāvā filozofijas kategorijas. Bez filozofijas kategoriju pielietošanas nevar iztikt neviena zinātne. Tāpat zinātniskajā izziņā vajadzīgas noteiktas kategoriālās shēmas ne tikai zināšanu iegūšanai, bet arī to klasificēšanai un transfomēšanai.

Integratīvā funkcija. Mūsdienās līdztekus metodoloģiskai funkcijai filozofijā vērojama integratīvā funkcija. Integratīvā funkcija, pirmkārt, saistās ar zinātnes attīstību. Mūsdienās zinātnes jomā notiek nepārtraukta diferenciācija. Uz jaunu objektu pamata tiek nodalīti jauni un jauni pētījuma priekšmeti, veidojas jaunas zinātņu nozares un apakšnozares. Līdz ar to problemātiska

kļūst kompleksu, sarežģītu uzdevumu risināšana. Zinātnieki bieži vien runā katrs savā valodā. Šādā kontekstā filozofija zinātnē pilda savienojošo darbību, veido kopīgu pamatu: fundamentālus jēdzienus, koncepcijas un teorijas, ko izmanto citas zinātnes. Filozofijas integratīvā funkcija, otrkārt, izpaužas dažādu sfēru, jomu un institūtu integrēšanā. Mūsdienās šāda darbība nepieciešama, piemēram, vienojot politikas, tiesību un morāles sfēras.

Filozofijas **terapeitiskā funkcija** izpaužas cilvēka iekšējās pasaules sakārtošanā, dziedināšanā, garīgā līdzsvara veidošanā. Filozofijas terapeitisko funkciju var saskatīt gan Senās Ķīnas un Senās Indijas filozofijā (daoisms, joga, budisms u.c.), gan antīkajā filozofijā (Sokrata maieutika, Epikūra un stoiķu filozofija), gan viduslaiku un mūsdienu reliģiskajā filozofijā, gan arī modernajās psihoanalīzes, Heidegera, Fuko un Gādamera koncepcijās.

Filozofijas **kritiskā funkcija** izpaužas divējādi. Pirmkārt, filozofija vērš uzmanību uz sabiedrībā esošajām nepilnībām, negācijām, trūkumiem. Aicinot tos pārvarēt, filozofija izvairās no kaila nolieguma, negācijas. Otrkārt, sākot ar Kantu, filozofā attīstās kriticisms attiecībā pret prāta, domāšanas iespējām un rezultātiem. Filozofiskajā refleksijā pati filozofija kļūst par konstruktīvas kritikas objektu. Filozofijas konceptuālās nostājas kritikas jautājumos veido teorētisku pamatu kritiskās domāšanas attīstībai, kas mūsdienās ir svarīga jebkurā cilvēka darbības jomā, bet it īpaši izglītībā (plašāk par to sk. Z. Rubene, 2008).

Aktuāla mūsdienās ir filozofijas **aksioloģiskā funkcija**, kas izpaužas vērtībsistēmas un vērtīborientācijas veidošanā. Mūsdienās, pastāvot dažādiem kultūrvēsturiskiem un reliģiskiem nosacījumiem, visai problemātiski ir izvirzīt uzdevumu – veidot vienotu vērtību sistēmu. Vērtību attīstība mūsdienās notiek dažādu civilizāciju, kultūru un reliģiju mijiedarbības apstākļos. Tādējādi vērtību un vērtīborientācijas jautājumi ir svarīgi gan kultūrā un reliģijā, gan morālē un pedagoģijā, ekonomikā un politikā. Filozofija veic vērtību izpēti, klasificē tās, izstrādā dažādus vērtību sistēmas modeļus, īpašu vērību pievēršot ētiskajām vērtībām. Šādi izpaužas filozofijas praktiskā orientācija un **ētiskā dimensija**.

Filozofijas funkcijas jāaplūko, ievērojot to **savstarpējo saistību**. Izziņas funkcija ir cieši saistīta ar metodoloģisko, integrējošo un prognostisko funkciju. Kritiskā funkcija izpaužas saistībā ar aksioloģisko funkciju, bet pasaules uzskata veidošanas funkcija – ar terapeitisko funkciju.

Morāle mūsdienu Latvijas sabiedrībā

Turpinot tematu par filozofijas aksioloģisko funkciju, pievērsīsimies ētikai. Pārdomājot ētikas lomu mūsdienu sabiedrībā, vispirms jāprecizē atšķirība starp terminiem **”ētika”** un **”morāle”**. Latvijā, sevišķi plašsaziņas līdzekļos un sarunu valodā, šie termini bieži tiek lietoti ar vairāk vai mazāk identisku nozīmi, bet, piemēram, anglofonajā filozofiskajā literatūrā pastāv

skaidrāks nošķīrums starp ētiku un morāli: ētika ir filozofijas nozare, kuras uzmanības lokā ir morāle, savukārt morāle ir sabiedrībā valdošie priekšstati par normām, vērtībām, tikumiem u.tml. Tāda vai citāda morāle pastāv jebkurā sabiedrībā, bet ētika spriež par galvenokārt par jābūtīgo, par to, kādai morālei vajadzētu būt.

Ko mēs zinām par morāli mūsdienu Latvijas sabiedrībā? Esot daļai no šīs sabiedrības, mums, protams, ir savi subjektīvie vērojumi un priekšstati, taču pamatā tie aprobežojas ar draugu, paziņu un kolēģu loku, kas vēl nedod iespēju spriest par sabiedrību kopumā. Ņemot vērā to, ka Latvijas sabiedrību, kā jebkuru sabiedrību, veido atšķirīgas personības un iedzīvotāju slāņi, grūti izdarīt kādus vispārinošus secinājumus. Parasti, runājot par morāli, mēs pievēršamies galvenokārt negatīvajam, bet pozitīvo uztveram vairāk kā pašsaprotamu – piemēram, to, ka Latvijas sabiedrība kopumā vismaz līdz šim ir spējusi atturēties no vardarbības. Vērojot pēdējā laika notikumus citās Eiropas valstīs, tas vairs nešķiet tik pašsaprotami (cerams, ka 2009. gada 13. janvāra grautiņi Vecrīgā paliks vienīgais izņēmums).

Objektīvāku ainu par morāli mūsdienu Latvijas sabiedrībā varētu sniegt socioloģiskie pētījumi un sabiedriskās domas aptaujas, taču šādu pētījumu ir maz. Kā izņēmumu var minēt pagājušā gadā veiktu aptauja, kurā cilvēkiem bija jāatbild uz jautājumiem, ko viņi uzskata par morāli nepieņemamu. Aptaujā atklājās, ka, piemēram, laulības pārkāpšanu par morāli nepieņemamu uzskata 57% respondentu, kukuļa došanu ceļu policistam – 34%, abortu veikšanu – 29%, daļēju nodokļu nemaksāšanu – 27% (LETA, 2010). Jāņem gan vērā, ka šādās aptaujās jautājumi mēdz būt nepietiekami konkrēti formulēti, turklāt uz tiem sniegtās atbildes ir atkarīgas arī no tā, kā respondenti ir sapratuši uzdotos jautājumus (piemēram, nav skaidrs, vai visos gadījumos ”morāli nepieņemams” ir ticis saprasts vienlaikus arī kā ”sodāms kā likumpārkāpums”).

Tomēr, runājot par minēto aptauju, grūti izvairīties no secinājuma, ka Latvijas iedzīvotāji morāles normu ievērošanu neuzskata par īpaši svarīgu; salīdzinājumam, piemēram, nodokļu nemaksāšanu par nepieņemamu uzskata 79% ASV iedzīvotāju (Brauna, 2010). Morāles jautājumos izšķiroša nozīme ir tradīcijām, un šķiet, ka lielā mērā pie vainas ir Latvijas sabiedrībā dziļi iesakņojies pusgadsimtu ilgušā padomju okupācijas laika mantojums ar tā nepieciešamību pielāgoties, korumpētību, konformismu un ētikas problēmu ignorēšanu. Piemēram, minētajā aptaujā vairāk nekā puse cilvēku atklāja, ka ir zaguši darbavietās (Brauna, 2010). Valda labi zināmais attaisnojums, ka ”visi tā dara”.

Vienlaikus kopš Latvijas neatkarības atgūšanas ir attīstījusies tendence atdarināt seklākās un ārišķīgākās Rietumu masu patērniecības kultūras izpausmes. Šķiet, ka vislielāko ietekmi uz

ievērojamas sabiedrības daļas priekšstatiem par labu dzīvi atstāj ”dzīves stila” žurnāli. Mūsdienās autoritātes vairs nepauž normas, bet vilina un kārdina (Kūle, 2007).

Ētikas kā filozofijas nozares nozīme sabiedrībā

Kāda ir ētikas kā filozofijas nozares ietekme uz mūsdienu sabiedrības morāli? Pirmajā brīdī šķiet, ka šī ietekme ir niecīga. Neliekas, ka sabiedrības morāles prakses veidošanā nozīmīga loma ir profesionālo filozofu publikācijām un atziņām. Atbildes uz filozofiskiem un ētiskiem jautājumiem lielākā daļa Latvijas sabiedrības drīzāk meklē ezotēriska rakstura publikācijās (kuras grāmatu veikalos parasti atrodamas cieši līdzās filozofijas grāmatām) un viegli uztveramās populārās psiholoģijas grāmatās. Turklāt mūsdienu filozofijā, ieskaitot morāles filozofiju un praktisko ētiku, pastāv atšķirīgi virzieni un viedokļi ne vienā vien jautājumā, kuri varētu interesēt plašāku sabiedrību. Ja nepieciešams, var atrast ekspertus, kas pratīs pamatot pat pretējus viedokļus, piemēram, abortu jautājumā. Filozofija nav ”prece”, kuru iegādājoties, var iegūt gatavas atbildes. Tā vietā jādomā līdzi, jāsalīdzina dažādi argumenti un viedokļi.

Lielai daļai sabiedrības ir visai aptuvens priekšstats, kas vispār ir filozofija. Aptaujājot studentus par viņu iepriekšējo pieredzi, atklājas, ka tikai samērā niecīgs skaits no viņiem ir saskārušies ar filozofiju kā izvēles priekšmetu skolās. Runājot konkrētāk par ētiku kā filozofijas nozari, situācija ir nedaudz labāka. Latvijas skolās (galvenokārt pamatskolas klasēs) ir ieviesti ētikas kursi, kuru veidošanā ņem dalību arī filozofi. Latvijas augstskolās situācija ir atšķirīga; kā mēs (raksta autori) labi zinām no savas pieredzes, ētikas kurss LLU tiek docēts pirmā kursa studentiem (izvēles kursi ētikā un bioētikā ir ieviesti arī atsevišķu studiju programmu maģistrantiem). Šo mācību priekšmetu un kursu ietekme uz jauno paaudzi visdrīzāk ir dažāda, tā ir atkarīga kā no kursu satura un pasniegšanas metodikas, tā arī no skolēnu un studentu interesēm un dzīves uztveres – ētika var likties gan kā kaut kas interesants un pārdomas rosinošs, gan arī tikai kā atgādinājums par ierobežojošām normām, kuras traucē baudīt dzīvi.

Kādai vajadzētu būt ētikas kā filozofijas nozares un ētikas kursu lomai? Vai ētikas studēšana var cilvēku padarīt labāku? Ir filozofi, kas uz šo jautājumu atbild noliedzoši. Pēc viņu domām, ”ētika neaizvieto individuālu lēmumu pieņemšanu un izšķiršanos, nerada ar argumentācijas palīdzību nekādu labu gribu” (Pieper, Thurnherr, 1998, citēts pēc Rubenis, 2005, 10).

Tas nenozīmē, ka šo filozofu skatījumā vispār tiek noliegta ētikas nozīme. Ētika, piemēram, ”problematizē morālas rīcības attaisnojuma pretenzijas; analizē morālās valodas specifiku; uzsāk rīcības argumentētu pamatojumu; pamudina vingrināties praktiskajā spriestspējā; izvirza prasību cilvēkam būt morāli kompetentam par savu rīcību” (turpat).

Tomēr jāpievērš uzmanība, ka saskaņā ar šo viedokli morālās spriestspējas attīstība tiek skatīta vienīgi kā daļa no kognitīvo spēju attīstības kopumā. Šādi morālās spriestspējas attīstību skata arī morāles psiholoģijā labi pazīstamā Lorensa Kolberga koncepcija. Indivīdam ar pietiekami attīstītām kognitīvajām spējām attīstās arī morālā spriestspēja (kas saskaņā ar Kolberga pētījumiem neizslēdz nozīmīgas individuālās atšķirības morālās spriestspējas attīstības ātrumā un pakāpē; Damon, 1999). Tādā gadījumā audzinātāja uzdevums ir ne tik daudz iemācīt ko pilnīgi jaunu, bet galvenokārt atgādināt par morālo redzes viedokli: ”Cilvēkiem daudz biežāk ir nepieciešami atgādinājumi, nevis pamācības” (*Dr.* Džonsons, citēts pēc Lūiss, 2006, 90).

Apgaismības laikmeta filozofijas uzsvars uz autonoma indivīda racionalitātes attīstīšanu ilgstoši ir bijis valdošais izglītības filozofijā (Haydon, 2003). Tomēr, sevišķi pēdējos gadu desmitos, tas ir ticis pakļauts arī kritikai. Kā norāda apgaismības filozofijas kritiķi, piemēram, Alesdairs Makintairs, diez vai var runāt par ”tīru” vispārcilvēcisku racionalitāti, kas būtu pilnīgi neatkarīga no specifiskām domāšanas un praktiskās racionalitātes tradīcijām (MacIntyre, 2003). Runājot par morāli, racionālistiskas pieejas galvenais trūkums ir tas, ka tā neskar emocijas un morālo motivāciju.

Šo iemeslu dēļ pēdējo gadu desmitu ētikā un izglītības filozofijā priekšplānā ir izvirzījusies tikumu ētikas pieeja (ar tikumiem ētikā tiek saprastas visas pozitīvi vērtējamās rakstura īpašības), kuras aizsākumi meklējami Aristoteļa filozofijā (Aristotelis, 1985). Tikumu ētika uzsver pozitīvi vērtējamu morālo dispozīciju ieaudzināšanu, kas ietver sevī ne tikai racionalitāti, bet arī jūtas un motivāciju (Haydon, 2003). Jāatzīmē gan, ka arī apgaismības laika filozofi, piemēram, Imanuels Kants savā vēlīnajā darbā *Morāles metafizika* (1797), aplūkoja tikumus kā nozīmīgu morāles sastāvdaļu (Kant 1983; Rubenis, 2006).

Pedagoģijā tikumu ētikas pieeja ir izvirzījusies kā valdošā, piemēram, ASV, kur tā tiek dēvēta par raksturizglītību (*character education*; Kiope, 2005, 114). Protams, raksturu nevar audzināt ar loģiskas spriešanas palīdzību vien; morālo jūtu un motivācijas attīstībā nozīmīga ir, piemēram, literatūra un vēsture, un vēl jo vairāk tradīcijas, iekšējie likumi, ceremonijas utt. (turpat).

Tomēr, lai kā uzsvērtu emociju, motivācijas un tradīciju lomu, diezin vai var uzskatīt par nenozīmīgu arī morālo spriestspēju un zināšanas par ētiku, tās principiem, koncepcijām un problēmām. Jūtām dzīvē ir liela nozīme, taču vienlaikus mēs vēlamies, lai tās saskanētu ar pamatotiem prāta spriedumiem. Zināšanas un kritiska domāšana dod iespēju nepakļauties konformismam, vienkāršotām klišejām un ideoloģiskai manipulēšanai, attīstīt vispārcilvēcisku pieeju ētikas problēmām, kas nav mazsvarīgi mūsdienu globalizācijas apstākļos. Šādā aspektā sava nozīme ir arī ētikas kā filozofijas nozares apguvei. Noslēgumā gribētu minēt dažas aktuālas

tendences mūsu sabiedrības apziņā, kuru izpratnē un risināšanā morāles filozofijai var būt sava loma.

Runājot par mūsdienu Rietumu kultūras ietekmi, jāmin morālā relatīvisma izplatība sabiedrībā. Morālais relatīvisms reti kad tiek skaidri formulēts, bet pamatā tas izpaužas pārliecībā, ka ētikai ir līdzība ar personiskās gaumes jautājumiem, attiecībā uz kuriem katrs var izvēlēties sev tuvāko viedokli (vai arī ētika sabiedrības apziņā tiek nesaraujami saistīta ar personiskās reliģiskās pārliecības jautājumiem, kuriem saskaņā ar plaši izplatītu viedokli nav nekāda sakara ar racionalitāti). Līdz ar to ētika tiek saprasta tikai subjektīvi un tātad krasi atšķirīgi no zinātnes, kurā tiek atzīti vispārēji racionalitātes un loģiskas domāšanas kritēriji. Ar šādu skatījumu uz ētiku bieži nākas saskarties, docējot ētikas kursu studentiem.

Minētais skatījums uz morāli un ētiku bieži tiek pieņemts kā pašsaprotams, lai gan totālam morālajam relatīvismam (t.i., relatīvismam attiecībā uz *visiem* spriedumiem morāles jomā) mūsdienu morāles filozofijā tikpat kā nav piekritēju, jo pret to var izvirzīt būtiskus pretargumentus (plašāk par to sk. Brāzma, 2008). Turklāt relatīvisms ne sevišķi veicina kritisko domāšanu, vēlmi pēc argumentētām diskusijām. Ja katrs var vienkārši izvēlēties sev *tuvāko* viedokli, tad nav vajadzības censties noskaidrot, kurš varētu būt *pamatotākais* viedoklis.

Nereti tiek maldīgi uzskatīts, ka relatīvisms, kas katram ļauj pieturēties pie sev tuvākiem uzskatiem, ir vienīgais veids, kā uzturēt iecietīgu jeb tolerantu attieksmi pret citiem cilvēkiem. Patiesībā totāls relatīvisms nav savienojams ar prasību būt iecietīgam, jo tad tiek atzīta vismaz viena absolūta norma – esi iecietīgs. Turklāt, vai morālā relatīvisma noliegums padara cilvēku par neiecietīgu? Pastāv arī cits skatījums uz iecietību kā tikumu: iecietība nenozīmē, ka mēs nedrīkstam saglabāt kritisku attieksmi pret tiem vai citiem uzskatiem. Iecietība nozīmē, ka, kritiski vērtējot cilvēka uzskatus, mēs nedrīkstam sākt nicināt un uzturēt naidīgu attieksmi pret pašu cilvēku, kas šos uzskatus pauž. Šāda izpratne par iecietību veicina kritisko domāšanu un diskusiju kultūru.

Jāatzīmē arī, ka plašsaziņas līdzekļos dažkārt tiek neprecīzi lietoti ar ētiku saistīti jēdzieni. Tas rada dažādus pārpratumus un manipulācijas ar sabiedrisko domu. Piemēram, relatīvisms sabiedrības apziņā bieži tiek jaukts ar plurālismu un liberālismu. Plurālisms nozīmē vērtību dažādības atzīšanu, taču tas nenozīmē, ka par vērtīgu tiek atzīts jebkas. Savukārt liberālisms ir politiskā ideoloģija, kas krasi nošķir publiskās un privātās dzīves sfēras, taču no šāda nošķīruma neizriet, ka visas izvēles privātās dzīves sfērā ir relatīvas.

Pārdomāta jēdzienu izpratne ir vēl viena joma, kurā var palīdzēt ētikas un filozofijas studijas.

Secinājumi

1. Filozofijas raksturošanā pastāv divas pieejas: substancionālā pieeja, kas meklē filozofijas būtību, un funkcionālā pieeja.
2. Filozofijas loma sabiedrībā mainās saistībā ar sociālekonomiskām un kultūrvēsturiskām izmaiņām. Mūsdienu sabiedrībā aktualizējas filozofijas aksioloģiskā, kritiskā un prognostiskā funkcija.
3. Filozofijas lomas un funkciju izvērtēšanā mūsdienu sabiedrībā nepieciešami plašāki pētījumi, kas līdztekus teorētiskajiem pētījumiem filozofijā ietvertu arī empīriskos pētījumus socioloģijā.
4. Runājot par filozofijas praktisko dimensiju, mūsdienu izglītības filozofija akcentē tikumu ētikas pieeju un raksturizglītību, tomēr nebūtu pareizi noliegt arī ētisko zināšanu un morālās spriestspējas nozīmi. Ētikas problēmu racionāla analīze attīsta kritisko domāšanu un argumentēta dialoga prasmes, sniedz pārdomātu jēdzienu izpratni, dod iespēju nepakļauties konformismam, vienkāršotām klišejām un ideoloģiskai manipulēšanai.

Izmantoto literatūras avotu saraksts

1. Aristotelis (1985) Nikomaha ētika. Tulk. I. Ķemere. R.: Zvaigzne.
2. Brauna A. (2010) Citādie latvieši (intervija ar Arni Kaktiņu). Žurnāls Ir, 5.-11. augusts, 25.-29. lpp.
3. Brāzma G. (2008) Relatīvisma problēmas no antīkās filozofijas līdz mūsdienām. Grām.: Praktiskā filozofija. – Jelgava, LLU. 157.-172. lpp.
4. Damon W. (1999) The Moral Development of Children / Scientific American. August. Pp. 56-62.
5. Haydon Gr. (2003) Moral Education. In: A Companion to the Philosophy of Education. Blackwell publishing. Pp. 320-331.
6. Hesle V. (2011) Tagadnes krīze un filozofijas atbildība. – R.: LU Filozofijas un socioloģijas institūts.
7. Kant I. (1983) Ethical Philosophy. Hackett Publishing Company.
8. Kiope M. (2005) Izglītības sistēma un kristīgās vērtības. Grām.: Kristīgās vērtības un modernitātes izaicinājums. – Filozofijas un socioloģijas institūts. 101.-118. lpp.
9. Kūle M. (2007) Dumpīgais laikmets: vai normas pastāv? E-vēstnesis, 19. septembris.
10. LETA (2010) Būt gejam ir amorālāk nekā nemaksāt nodokļus. Laikraksts Diena, 3. aprīlis, 6. lpp.
11. Lūiss K. S. (2006) Vienkārši kristietība. Tulk. Ģ. Grietiņš. R.: Klints, 2006.
12. MacIntyre A. (2003) Whose Justice? Which Rationality? University of Notre Dame press.
13. Rubene Z. (2008) Kritiskā domāšana studiju procesā. – R.: LU Akadēmiskais apgāds.
14. Rubenis A. (2005) Kas ir tikumu ētika? / LU raksti. 687. sējums Filosofija. 9.-20. lpp.
15. Rubenis A. (2006) Imanuels Kants. Izdevniecība Minerva.
16. Vedins I. (2008) Patiesība un vērtības / RTU zinātniskie raksti, 8.sērija, 14.sēj. – R.: RTU, 109-118 lpp.
17. Бучило Н.Ф., Чумаков А.Н. (2001) Философия.-М.: ПЕРСЭ.
18. Гурина М. (1998) Философия. Пер с фр. – М.: Республика.
19. Канке В.А. (2005) Философия. – М.: Логос.
20. Крапивенский С.Э. (1998) Социальная философия. – М.: Владос.
21. Философия. Под ред. Кокановского В.П. (2003) – Ростов н/Д: Феникс.
22. Степин В.С. (2009) Конструктивные и пригностические фукнкции философии / Вопросы философии. N 1. - С. 5-10.
23. Philosophy as Therapy – Introduction [tiešsaiste]. Pieejams: http://www.socrethics.com/Folder2/Philosophy-as-Therapy.htm [skatīts 21.02.2012]

THE PROBLEM OF PERSONALITY AND PROFESSIONAL IDENTITY IN PLATO'S WORKS

Makarevičs Valērijs, Dr. psych., Daugavpils University, Parādes 1, Daugavpils, 5401 Latvia,
valerijs.makarevics@du.lv
t.37165428636

Abstract. In order to understand the essence of a scientific problem better it is useful to follow the sources of its origin and the ways of its development. In our work we try to find the answer to the question how personality and professional identity was understood by the ancient Greek philosopher Plato. The method of the research was the analysis of works both by Plato and by the modern authors writing about him. We may note that Plato did not use the notion „identity". But his conception of the development of the personality includes the criteria of modern understanding of identity (the time and social aspects). According to Plato, the basis of the personality and professional development of a person is his/her understanding of justice. The principle of justice, in its turn, provides the sustainable development of society.
Key words: Plato, personality identity, professional identity, principle of justice, sustainable development

Introduction

Studying the past we receive the ability to better understand what is happening in the present. There was not a single state in the world where people would not think about the way of preserving the achieved way of life for descendants. The variants could be different: preserving the existing system in the interests of the ruling family, of the privileged elite or of the whole nation (or the peoples inhabiting the state).

The cradle of modern European civilization is Ancient Greece. The outstanding thinkers who lived in Hellas in the Vth—Ist centuries BC offered to the world humanistic, political educational and other conceptions which did not lose thier actuality and received their continuation in modern ideas about the world, art and person.

Ancient Greece was not a state in the modern understanding. The people lived in different city-states with their own laws and own interpretation of their history. Subsequently we will come across a similar way of organizing an ethnically single society in Italy and Germany. Numerous city-colonies were located beyond the borders of classical Ancient Greece. It is there where the views on the nature of the world and the person were born. These views promoted the understanding of the psychic peculiarities development of the personality and eventually the personality formation.

Subsequently the centre of philosophical thought moves to Athens. Athens gave Plato and Aristotle to the modern world..

But at the beginning there was Plato. He did not write directly about the problems of sustainable development. But it was Plato who in his works suggested the conception of the development of society and person which envisages the creation of favourable circumstances for the existence of mankind. The central place in this conception belongs to the citizen of the city-state

possessing certain personality and professional qualities. These qualities are formed in the process of specially organized upbringing and education on the basis of inborn peculiarities. All of the above mentioned determined the aim of our work – to find and to concretize in Plato's works the conditions of the personality and professional identity formation as the basis of the person's sustainable development.

The main task of the research is to compare Plato's views upon the person's adequacy (identity) in relation to society with modern views upon the personality and professional identity. The research question which the author of the article intends to answer can be formulated as follows. Was the problem of identity actual for Plato? Maybe, already in the years BC, he using other concepts was trying to understand the conditions lying in the basis of harmonious relations of person and society. In his opinion, these conditions provided the sustainable development of the existing socio-political system.

The only method which allows to find the answer to the above formulated question is the analysis of Plato's texts and the comparison of these texts with the works of other ancient and modern authors.

The problem of identity and sustainable development

The term 'sustainability' and the related to it concept of sustainable development are introduced into the scientific vocabulary in the last decades of the 20th century. It is considered that Capra (Capra, 1982, 2002) is one of the first to touch upon the problem of sustainability in his works. This term means the provision of conditions of full value for life and personality development within the framework of one generation and preservation of these conditions for the future generations**.** Sustainable development includes three interrelated constituents**: s**o**c**ial, economic and ecological ones. The personality of a human being and his/her activity are in the centre of the conception of sustainable development.

The personality of a human being is formed in the process of upbringing and education. Therefore, in the conception of sustainable development serious attention is paid to the forms and content of education orientated towards sustainable development. The issue about the content of such education is being actively discussed nowadays

In the Strategy for education orientated towards sustainable development by the European Economic Commission of the United Nations Organization it is noted that the content of such education should include the formation of the personality's value sphere, of critical (systemic) thinking and the professional choice. At that, the professional choice includes the understanding of

how the personality's professional activity will be connected with the responsibility to society and how it can affect the environment (ANO stratēģija izglītībai ilgtspējīgai attīstībai 2005). It means that the major component of sustainable development is the personality's ability to plan the future proceeding from the analysis of the past and present. (Grabovska, 2006).

All of the above allows to make a conclusion that the sustainable development of society is inseparably connected with the personality development which is also characterized by this quality – sustainability. Sustainability or identity in time is the main characteristic feature of the personality identity. Therefore, the main task of the education orientated towards sustainable development is the ensuring of conditions promoting the formation of personality, social, professional and other identities of the personality. These identities include understanding of the necessity of sustainable development both with the pupil (student) and with the teacher (lecturer). (Salite, Pipere, 2007).

The notion of identity and professional identity

Originally, the notion of identity meant the maximum approximation and fusion of the image and essence of the object or phenomenon with its prototype – idea. In the history of science this point of view was first put forward by Plato.

Subsequently this model of the image and prototype was used in philosophy, sociology and psychology. At that, modern philosophers, as well as other scholars, introduce a somewhat different meaning into the notion of identity. In modern understanding the identity of the personality is connected with the ability to adapt successfully to the contemporary society preserving one's own individuality.

The founders of modern theories of identity are Husserl and Lakan. For Husserl the identity of the personality is, first of all, connected with the inner harmony of the personality. The inner harmony appears when the subject finds the ability to become aware of one's Self or one's real nature.(Гуссерль, 2001). For Lakan the identity means the balance of the outer and inner world of a person (Лакан, 1994). Subsequently these two points of view became the basis of understanding of the personality and social identity of a human being.

Traditionally, the founder of the psychological theory of identity is considered to be Erik Erikson. He notes that:

- the identity is formed in the process of socialization and is the result of separate identifications;
- the identity is manifested as mental constancy;
- the identity is continuous in time (Erikson, 1959, 1963, 1968).

At that, in Erikson's understanding of identity there is no clear border between personality and social identity.

Subsequently, this understanding of identity, or the one close to it, spread to different spheres of life and activity of a person. Nowadays in scientific literature we can come across the mention about corporative, ethnic, gender and other kinds of identity. Among all these new kinds the professional identity occupies a special place. There exists an opinion that professional identity is a special formation which is not connected with other identities.

Identity is one of the fundamental peculiarities of a personality. Consequently, for a better understanding of this phenomenon one should turn to the theories of personality, especially to those which are the most informative in this issue, i.e. to the structural theories of personality. For further preliminary analysis we will choose C.G. Jung's understanding of personality. According to C.G.Jung, there are two important centres in a human being's psyche.

One of them is connected with the person's understanding of what is taking place here and now. This understanding is realized by the personality structure under the name Ego. But Ego as the individual understanding of what is taking place in social life does not always give an opportunity to adapt to what is happening in the personality's social environment. The necessity to live among other people and to acquire social and professional skills lies in the basis of the human being's acquisition of Person.

The personality is the intermediary between one's own inner world and the outer world – social and natural environment. Erikson's conception of identity explains the essence of this intermediation. But the explanation of this essence, in our opinion, can not satisfy a modern person.

Any search for the truth presupposes a historical digression. The modern history of Europe started with Ancient Greece. Two universally recognized geniuses of thought – Plato and Aristotle – lived and created in Ancient Greece. Let us turn to Plato, analyze his thoughts and try to clarify his point of view upon the formation of personality, social and professional identity and upon those peculiarities of a person's development from which benefits both his/her individual life and the well-being of the state where he/she lives.

An ideal personality according to Plato

The understanding of cosmic and human justice lies in the basis of Plato's ideas about an ideal person. In the works of ancient Greek philosophers these ideas were first substantiated by Anaximander and Heraclitus. (Russel, 1964).

Justice includes the understanding and clear division of the notions of good and evil, acceptance and support of the good and non-acceptance of the evil. Plato is familiar with these teachings and follows them. He considers that the notion of justice is not the highest one in the hierarchy of notions with the help of which one can characterize an ideal person representing an ideal state. Justice, according to his views, is a particular manifestation of a more general notion which he calls good.

Plato considers that understanding of the good and the evil is not inherent in all people. It can be inborn. It can be taught to a person organizing the processes of education and upbringing in a special way.

Plato calls the inborn capacity to distinguish the good and the evil kalokagathya (from Greek: Calos – wonderful, Agathos – good). Only few people chosen by the God possess this capacity. These are special people - dimons - capable to hear their own inner voice in which the space and the Gods talk. The good is manifested in following the principle of the good. At that, the person can not fully realize the principle of the good during his/her earthly existence as the idea and its concrete realization are different essences. „The good is not existence. It is beyond the existence exceeding it in dignity and power" (Платон, 1998; 317). The good is first of all realized in the ability to be just and to become just.

The stability of the state depends on how well its rulers can follow the principle of the good. Teaching to follow the principle of the good, according to Plato, should take into consideration the peculiarities of the human soul structure. There are three beginnings in a person's soul: reasonable, unreasonable and the longing ones. The upbringing and education are connected with the development of the reasonable part of the soul and with different limitations of manifestations of its longing part. The development of the reasonable part is based on sophrosyne – the ability for the cognition of oneself and other people, for evaluating your actions and social phenomena according to what is good and what is evil. Sophrosyne is also manifested as decency and tranquility of the soul and the body, modesty of the soul and doing „one's own deeds".(Платон, 1986).

In „The State" Plato writes about four kinds of the good (divine virtue): wisdom, courage, prudence and justice. In „Laws", one of the thinker's last works, he writes about different kinds of the good: health, beauty, corporal power and wealth (Платон, 1998). In the first case, the author seems to concentrate his attention on a person's spiritual perfection while in the second case he focuses on the bodily perfection as the soul and the body are inseparably connected. This connection in Plato's works constitutes the basis of the conception of a modern person's

upbringing. This conception includes two most important elements: gymnastics (harmonization of the body) and moysicos arts (harmonization of the soul).

As E. Temnov, the researcher of Plato's works notes, in „The State" wisdom reveals the foundations of all moral deeds, while in „Laws" the priority is given to prudence restraining the human deeds within the limits of moderation (Темнов, 1998).

Relations between the personality and the state.

In his works Plato follows the principle of cosmic justice. As we have noted above, the principle of cosmic justice is transformed into the principle of divine virtue. Cosmic justice is the manifestation of this virtue. But cosmic justice has different levels of its manifestation where the higher levels (the God, the state) subordinate to them lower levels – society, political parties, the person's individuality.

Plato follows the principle that the state is primary. But the stability of the state and its foundations depends on every citizen.

These are the citizens who are capable either to support or to destroy the foundations of the state. According to Plato, an ideal state (which means a sustainable state) should be ruled by people who received the upbringing of an ideal person and who possess kalokagathya. He calls them guards. Guards do not have a family or personal possessions. Those who have stood the test of temptation in their youth can become guards. They possess a philosophical way of thinking. Real (contemporary to Plato) states do not comply with the criteria of an ideal state therefore they are not sustainable. Real states do not differ in the principles of selection of their rulers but in the ways of power distribution and in the attitude of the rulers to those thinking differently. In the real state, be it an aristocratic, tyranic or democratic state, already in the second generation there begin to appear people dissatisfied with the existing order.Their identity is not formed under the influence of the purposeful education and upbringing. Here the main role is played by the processes of spontaneous social teaching. The number of such people increases with the time. Eventually it leads to changing one social formation by another. (Платон, 1998).

Personality and professional identity in Plato's understanding

Identity is, first of all, a social category. Identity means that a person is socially mature. He/she has got life plans, he/she is able to take responsibility for his/her actions and sees the connection of his/her actions with the progressive development of society and with the solution of his/her existential problems.

All of the above mentioned, refers to understanding the positive identity. There are other kinds of identity which were analysed in the works of Erikson's follower Marcia. (Марсиа, 1967).

Identity is the continuos self-identity (Burns, 1982). The time criterion within which the person stays loyal to himself/herself and to his/her ideals not contradicting his/her social environment is fundamental in the identity conceptions.

The time characteristics of identity is important for Plato as well. But unlike modern conceptions of identity, for him neither personality time nor historic time are fundamental for self-realization of the ideal person. In his conception of a person, time which can be called mythological is fundamental. It goes back into endless past since people possessing kalokagathya start their origin from higher Gods. Thus, in particular, Persia's tsars originate from Zeus**.** Lacedaemon tsars are the descendants of Zeus. (Платон, 1986: 538).

On the other side, identity is connected with the endless future, as the person's soul is immortal and the spiritual health of succeeding generations depends on his/her earthly deeds. Thus, Plato introduces eugenic substantiation into the understanding of identity. This substantiation in its obvious or hidden way is presented in Plato's conceptions of a person's finding of his/her personality identity. For people securing the sustainability of the state, identity is connected to sophrosyne. For those destroying the state, identity is connected with the uncontrolled social influences actualizing the longing part of the soul. Only sophrosyne harmonizes a personality and it promotes a person' striving for prudence.

Sophrosyne as a way to the ideal identity does not envisage the development of the individual. Moreover, the closer people approach this ideal the fewer individual variations must be revealed in their behaviour and ways of reacting to the events taking place in the socium.

Individuality, according to Plato, can take place only within the framework of professional identity, as everyone should do his/her own work and should not interfere into what others do within their competence. At that, professional identity secured by sophrosyne is realized in ruling the state and in reflections about the essence of life. But if personality identity is formed on the basis of spontaneous social influences then professional identity connected with it can only be revealed in the degree of mastery within the limits of a certain trade .

Conclusions.

1. Plato in his works does not use the notions „personality identity" and „professional identity". But taking into consideration the fact that identity is connected with the peculiarities of a

person's self-realization in the society where he lives (and in his works Plato writes about this) we can speak about his conceptions of personality and professional identity.

2. For Plato an ideal personality identity exists in the endless mythological time. A person in his/her earthly time can influence the subsequent generations and the peculiarities of their identity by his/her behaviour. The ideal identity within the lifetime is connected both with hereditory factors (kalokagathya**)** and with the peculiarities of mutual influences of biological and social factors of a person's development – sophrosyne. Sustainable identity of these people determines the sustainability of the social system in which they live.
3. The identity of the person existing only within the framework of his/her personality time is formed under the influence of uncontrolled social influences. The identity formed in this way does not facilitate the sustainability of social systems.
4. A person's individuality can be successfully developed only within the framework of professional identity.

References

1. ANO stratēģija izglītībai ilgtspējīgai attīstībai (2005). Viļņa.
2. Burns, R.B. (1982) Self-Concept Development and Educanion. Holt, Rinehart and Winston Ltd. London. New York. Sydney. Toronto.
3. Capra, F. (1982) The Turning Point, Science, Society and the Rising Culture. Bantam books, New York.
4. Capra, F. (2002) The Hidden Connection: A Science for Sustainable Living. Random House, New York.
5. Erikson, E.H. (1963) Childhood and Society. New York, Notron.
6. Erikson, E.H. (1959) Identity and the Life. Cicle, New York, IUP.
7. Erikson, E.H. (1968) Identity, Youth and Crisis. New York, Norton.
8. Grabovska, R. (2006) Implementation of the Principle of Sustainability in Teacher Education.
1. Promocijas darba pedagoģijas nozares augstskolas pedagoģijas apakšnozarē kopsavilkums. Saule. Daugavpils.
9. Marcia, J.E. (1967) Ego Identity Status: Relationships to Change in Self-Esteem, General Adjustment, and Authoritarianisms. Journal of Personality, 35, 98-107.
10. Russel, B. (1964) Hystory of Western Philosophy and its Connection with Political and Social Circumstances from the Earliest Times to the Present Day. London, George Allen &Unwin Ltd, Ruskin House Museum Street.
11. Salite, I., Pipere, A. (2007) Journal of Teacher Education and Training: Deepening Action Research. Good Practices in Teacher Education Institutions. UNESCO Education Sector. Paris. Pp. 41-46.
12. Гуссерль, Э. (2001) Картезианские медитации. Гуссерль, Э. Собрание сочинений. Т.4. Москва.
13. Лакан, Ж. (1994) Стадия зеркала и другие тексты. Москва.
14. Платон (1986) Алкивиад I. Платон. Диалоги. Составитель, редактор и автор вступительной статьи А.Ф.Лосев. Москва. Мысль. С. 175-222.
15. Платон (1998) Государство. Законы. Политик. Москва. Мысль.
16. Темнов, Е.И. (1998) Предисловие. Платон. Государство. Законы. Политик. Москва. Мысль. С. 5-62.

SOCIETY "FOR" AND "AGAINST" LEGALIZATION OF EUTHANASIA

SABIEDRĪBA "PAR" UN "PRET" EITANĀZIJAS LEGALIZĀCIJU

Rihards Poļaks, Mg. iur.,
Doctoral student of legal science, Latvian University Faculty of law,
Postal address: Svētes street 28 – 10, Jelgava, Latvia, postal code: LV-3001,
E-mail: rpolaks@inbox.lv, mobile phone number: (+371) 26729263

Abstract. On the appearance of the term of *"euthanasia"* in the XVII th century, one of the most complicated and discussed questions was formulated within all of history, i.e., if a human has any rights to take another life because of compassion even if someone requests their own death. The answer to this phenomenon is not found even nowadays, dividing society into supporters and deniers of euthanasia.

The issue about the possible legalization of euthanasia has entailed an especially active discussion among physicians, lawyers, philosophers and clergy, and as a result the analysis shows that until now the Christian religion expresses categorical rejections to any aspirations to legalize euthanasia, and physicians and lawyers thoughts about this question remain rather contradictory.

One stream of physician consider that the Hippocratic Oath, which includes straightforward prohibition of practicing euthanasia, has become archaic and it does not correspond to the rapid development of medicine. On the other hand, another school of thought supposes that euthanasia contradicts the physician's mission and for this reason should not be authorized.

Furthermore, even among lawyers the opinions are divided. Some of lawyers defend the belief that any human has the right not only to life, but also to death; another fraction of lawyers opposes the current point of view by presenting the argument that the legalization of euthanasia would be a stimulus for the growth of crime and that is why its legalization should not be allowed.

Even if in such a complicated question a single point of view will hardly ever be achieved, constructive discussions promote not only the appropriate legal development of euthanasia, but also characterize our attitudes towards the question of death with dignity.

Key words: euthanasia, society, ethics.

Introduction

Even though the beginning of practicing euthanasia could be found already in antique times, the term of *"euthanasia"* appeared relatively recently, it was introduced in the XVII th century by the English philosopher Francis Bacon (1561-1626).

On changing centenaries, also the comprehension about "easy death" was changed, as well as in practice several unaided forms of it were marked, for example, active and passive, voluntary and non voluntary euthanasia, (physician) assisted suicide etc.

For that reason, nowadays with "euthanasia" one should understand the instance, when a physician or any other person consciously, due to compassion, with his own action or inaction causes death of terminally ill person based on these people or their legal representative's explicit request or any other instance, when such of request had not been made with the purpose to release dying person from the pain and suffer causes by a disease or from the medically unjustified extension of life.

Nowadays there are no medical problems in practicing euthanasia, merely, with the appearance of the term band subsequently by its legalization of the several forms of euthanasia in some countries, such as, the Netherlands[1] (Termination of Life on Request and Assisted Suicide (Review Procedures) Act, 2002), Belgium[2] (The Belgian Act on Euthanasia of May, 28th 2002., 2002), Luxembourg[3] (Loi du 16 mars 2009 sur l'euthanasie et l'assistance au suicide: Recuel de legislation, 2009) and in some other countries, there was formulated one of the most complicated and controversial questions in the history of humanity – if a human has any rights to take another life because of compassion of even personally request the death and do human rights to life which is connatural from the birth including also rights to death, the answer to this phenomenon is not found even nowadays, dividing the society into supporters and deniers of euthanasia.

About allowance of practicing euthanasia many decennary there is observed a never – abating discussion among branch specialists, mainly between miscellaneous representative of religion, physicians and lawyers, but unanimity up to this time has not been reached. In the same time there is directly expressed argumentation of these branch specialists who allow to look at the problematic of euthanasia in the context of the XXth and XXI th centuries more objectively, and to shape the presumed negative consequences, what can be produced in case of legalization of it.

As the aim of the research the author moves out to find out factual typical coefficient and denying arguments of legalization euthanasia among different branches of specialists. To reach this aim there are the following enabling objectives:

1. to find out linkage deputy of religions, physicians and lawyers arguments "for" and "against" legalization of euthanasia;
2. to find out the aspects of the existing confrontation between linkage specialist in the own groups, and also in terms of mutual interchange.

In order to achieve the enabling objectives the author has studied and analyzed mainly ethical, medical literature in Latvian, English and Russian languages, a legal doctrine, a foreign countries normative acts, publications and legal practice of the European Court of Human rights.

Research methods

In the research the author uses the analysis reference method to make the researched object separated in parts and inquire any element of it, with the help of the information obtained through the synthesis it could be possible to merge into one unit, and the deductive research method, with the help of it will be achieved in logical way new thoughts, which are based on previous formulated opinion in the analyzed question.

Results and discussion

Consequently, the issue of the euthanasia caused a sharp debate and criticism not only of the society, physicians and lawyers, but also among the clergy. These discussions take place not only at the national level, but we can also see its cross-border character that shows the enduring relevance and importance of this question worldwide.

So far in every country the sharpest criticism against the legalization of euthanasia has come from the Christian religion where it is believed that "easy death" directly violates one of the most important commandments of God - "Thou shalt not kill!" (Mozus 2;10)[4] (Bībele. Vecās un Jaunās derības svētie raksti, 1967).

Members of the clergy have different interpretation about prohibition of euthanasia. The Latvian University Dean of the Faculty of Theology Juris Calitis (Juris Cālītis) at one of the interviews indicated that the problem of euthanasia should not be assessed unambiguously. To live or die is not an important issue in the context of the Christianity, what is important – one has the right to decide[5] (Gabre, 2001). The pastor Juris Rubenis (Juris Rubenis) acknowledges that "the main issue is the questions about person assuming the power to intervene in matters that relate to our existence borders ..."[6] (Krišjānis, 1996). As a result of several decades - long debate a constant position has been created on the sanctity and inviolability of life, because only God not the human himself or another person can determine when new born will come to this world and when and under what conditions will pass away.

So far Vatican has approached with particularly sharp criticism against the "easy death". In order to formally express their position on May 5, 1980 in Rome the Sacred Congregation of Faith accepted and soon published The Vatican's "Declaration on euthanasia"[7] (Deklarācija par eitanāziju, 1996). This declaration is noteworthy for several reasons - namely, not only because it is one of the first documents of such type expressing the official position of the Christian religion representatives on the "easy death" issue, but it also explains the essence of euthanasia reviews the values of human life and surmises the main arguments on which Christians base their deprecatory attitude.

Russian Orthodox Church already in 1999 came with statement "The modern trends in legalizing euthanasia" considering euthanasia as a specific form of homicide and recognized it like a sin[8] (Исаев, Воропаев, Диллис, Караваева).

The unacceptability of the practice of euthanasia is not limited only by the Christian religion. The Jewish and Islamic faiths also sharps condemn the practise of "easy death". On July 16, 2003 in Stockholm, The Islamic Council of Europe on the precepts of the Koran officially announced that active and passive euthanasia and suicide are prohibited in Islam[9] (Islamic Religious Leadership

Council Rules against Euthanasia, Assisted Suicide, 2003.). Also the Jewish Law prohibits active euthanasia and this kind of activity is evaluated as a homicide. Also Mormons has a similar view on it[10] (Medical and life ethics). However, not all religions have a clear position in the context of euthanasia, diversity at opinion is observed. For instance in Hinduism and Buddhism, euthanasia is seen as an exceptional case, not as a norm.

If most of the religions practice and legalization of euthanasia and preclude using is argument that Creators arrangements and attitude to life, which with certain exceptions, are declared sacred and inviolable, the medics look upon "easy death" through the prism of medical ethics. The collisions of views result in establishment of two mutually controvert camps.

Part of the medical personnel consider euthanasia as contrary to the Hippocratic oath[11] (Sīle, 1999), as it contains a direct prohibition of practicing euthanasia and disagrees with physicians mission as such. Others argue that the oath is outdated and mismatches with rapid development of medicine. Even more, helping to "past away" from life for a human who is incurable with the method of "easy death" is much more humane and statuary than to watch patient suffering unbearable pain clearly knowing that in the near future the person will die. However, a question appear – once asked by former Latvian Doctor Association president Viestur Boka (Viesturs Boka) and with what one can agree - "who could draw a line and say - in this case human life would cease but in this not ..."[12] (Nikers, Fridrihsone, 2001).

It can be said that the majority of Latvian medical personnel deny euthanasia as one of the forms of assistance to hopelessly ill patients. In this context important cognition has the chief on Riga's Eastern Clinical University Hospital Clinic "Gaiļezers" Anesthesiology and Resuscitation Clinic and a associate professor of Riga's Stradiņa Anesthesiology and Resuscitation Department Viestur Ligut (Viesturs Liguts): "Humanly I understand it, but the physicians is not an executioner, he is unable and he can not execute the death penalty ..."[13] (Gavare, 2008). However, one needs to be cautious about such statements because not all physicians have the same about investigational question and as the Latvian Oncology Centre for Palliative Care department doctor Vilnis Sosar (Vilnis Sosārs) notes: "Latvia has euthanasia cases when hopelessly ill patients were given an excessive drug dosage or simple despair ate patient's suicide cases ... "[14] (Dinģelis, 1996).

Dr. V.Sosar believes that the issue of euthanasia arises when there is inadequate and off grade medical and social care and as an alternative palliative care is created[15] (Pohodņeva, 1998). However, it would not be superfluous to note that palliative care in Latvia is in development phase and is not available to each person[16] (Apine, 2005). Besides there have been significant reduce in budget of health sector.

Although, when looking for supportive and denying arguments of the practice of euthanasia that often have been looked at in the practical context, at first “easy death” is one of the most complex issues of medical ethics and from this perspective is unlikely to be solved at all.

Many medical professionals in the United States of America consider that active euthanasia, in contradiction with life support treatment, kills and therefore it is ethically incorrect. Others believe that the distinction between killing and permit patient to die from an illness is the difference between action and inaction. At the same time the majority holds the position that if a patient's quality of life is poor and continuing further existence is not desirable then the values that maintain the ethical side are not acceptable and therefore, if the patient is suffering and has no hope of recovery charity requests to maintain a voluntary active euthanasia[17] (Уиклер, Брок, Каплан, 1989).

J.Rachels (Dž. Reičels) also agree to such a view, esteeming that in many cases it is much more humane to use active euthanasia because passive euthanasia is excruciating and inhumane[18] (Rachels, 1987).

However, to this argument opponents can be found. As noted by A.Gromov (A.Gromovs) and G.Rossolimo (G.Rossolimo) medicine really should not become inhumane, however such patient requests are made reluctantly and often are not true because pain and disease alters the patient's personal harmony and as a result physicians during his actions need to reckon with patient not like with a regular person but like with a human who has the psychological diversity[19] (Котельников, 1987). Therefore, physician in the moment of aggravation of the disease needs to dedicate more attention to the care of the patient, maximally alleviating his passing away.

Indisputably „easy death” is a complicated question that surpasses context of contest of constant scientific discipline. Religious, ethical, medical aspects are in the continual interaction and they can not be viewed separately, also from the point of view of legal science.

Undeniably euthanasia endangers one of the most important interests protected by the criminal law – human life. That is why discussions between lawyers about admissibility of practicing and legalizing euthanasia, especially in foreign countries, are not rarity.

Like physicians, also lawyers do not have one single point of view in such complicated question. There are some who justify euthanasia in context of the humanity and human rights and there are also lawyers who think that practicing it and even more legalizing it, can not be allowed under any circumstances, noting the negative consequences that such action can cause.

Unfortunately in Latvia between communities of lawyers practically there are no discussions. In year of 2000 in one of the interview sworn advocate Vija Jacobson (Vija Jākabsone) accented, that in Latvia legalization of euthanasia is not allowed, as the main argument mentioned that “good

will to release a human from suffer can be used maliciously to dispose of undesirable"[20] (Saulīte, 2000). Sworn advocate Guna Kaminska (Guna Kaminska) drew attention to euthanasia, if this action is not parted by concerned person, as a free choice of human, nonetheless, in cases when someone has promoted taking away of a life, then the case is qualified as a homicide[21] (Jākobsons, 2000). In case if the law legalizing euthanasia will come into force, is considered to be state issue.

A slightly different point of view on 30 January, 2002 expressed the lawyer of the Latvian Office of the Patient Rights Solvita Olsen (Solvita Olsena) during the State Office of the Human Rights round table discussion, stating, that at the particular moment such a law could not be introduced until the field of the protection of the patient rights are not arranged, and at the same time stated, that patient has rights to refuse from the medically unjustified extension of life[22] (Valsts Cilvēktiesību biroja rīkotās apaļā galda diskusijas "Cilvēktiesības un eitanāzija Latvijā" materiāli, 2002).

Also in Russia between lawyers there is variety of opinion. One part of the specialists suggests declaring euthanasia as collateral circumstance eliminating criminal responsibility[23] (Ивченко, 2002), meaning decriminalizing this crime. Others suggest declaring homicide based on victims request as privileged composition, O.Kapinus (О.Капинус) even suggests to supplement Russian Criminal Codes Special part with special article[24] (Капинус, 2006). In her turn M.Maleinoja (M.Maleinoja) holds a view that euthanasia could be allowed only in the situation when patient has enounced explicit, absolutely conscious and insistent request, besides it should not be feared that euthanasia can be used malevolently, because its realisation has to be provided with extra duties that are applied by state and law enforcement bodies[25] (Мишаткина, Денисова, Яскевич, 2003).

Considering that the question of euthanasia straightly comes in to affect also with area of human rights then discussions about its admissibility goes to the context of the natural rights. For example, the advocates at the United Kongdom, who accede to legalization of euthanasia argued that patient has rights to commit suicide but, if they wish, they have rights to "easily go away" from life with the helping hand of physician. On the other hand those advocates who are against legalization of euthanasia distinguish between suicide and homicide and oppose that even if patient has rights to decide does he want to continue to live or not, it does not at the same time enlarge others rights to commit homicide based on victims interests[26] (Dworkin, Frey, Bok, 1998).

In the context of above mentioned cognition substantial is also judgment of the European Court of Human Rights of 2002 in Diane Pretty case[27] (Case of Pretty v. The United Kingdom, Application no. 2346/02, 2002) where court explains – it rights to life include also rights to death in context with Article 2 of the European Convention on Human Rights[28] (Cilvēktiesību un

pamatbrīvību aizsardzības konvencija, 1998). As the court decided right to life could not be interpreted as diametrically opposed rights, meaning the rights to death, at the same time the article does not include human self-determination rights to choose death instead of life[29] (Case of Pretty v. The United Kingdom, Application no. 2346/02, 2002).

This is only a small part of multiplicity view of points between lawyers in the context of the analyzed problem. Even there not physicians, nor lawyers hardly ever will achieve single point of view adduced analysis of arguments partly characterize our attitude towards qualities of life and question of death with dignity in the turn of the XXth and XXIth centuries.

Conclusions

1. Up to now explicitly negative attitude against practicing and legalizing euthanasia is observed in Christian religion, Islam and Judaism belief, argumented with the aspect that time when human have to come into life and when and on what kind of circumstances he have to go away from it can prescribed only by The Creator. Also suffering can not be a justifying reason because it serves for established purpose and duty to endure it with dignity will be compensate in afterlife. On the other hand acts that allow practicing of euthanasia do not only endanger established order of The Creator but also deny value of human life as such.
2. Even if nowadays there are no medical problems practicing euthanasia, incurable persons right to death first of all is ethical problem of medicine in addition there is a conflict between basic values – sanctity of life and humanity that is in endless mutual confrontation and can not be settled. As a result any activity of medical personal is it assent to make act of euthanasia or refusal of it, from society's side will be brought under critics, or admonishing of ethic of physician and their mission (to keep a life) or of extreme cruelty under the pretence of purposes of medicine.
3. As like as in case of physicians also between lawyers in question of euthanasia dominate dualism of opinions and hardly there will be reached any solidarity. One part of lawyers understand euthanasia as a fundamental right of human and that is why not only permit practicing but also legalizing it even if it is voluntary and thought - out request of terminally ill person. Other thinks that euthanasia even if it realized by compassion is a homicide because in both cases it endangers one of the most important interests protected by criminal law – human life.

4. Endless ethical, medical, religious, economical, social, judicial and other reasons mutually are confronted through centuries and society have not crystallized one viewpoint – is practicing and legalization of euthanasia allowable and hardly such one viewpoint ever will be formulated, considering the persuasive position of each clench.

References

1. Apine I. Ārstu pretargumenti eitanāzijai. *Latvijas Vēstnesis*. 2005. 11.oktobris, nr.161. Pieejams: http://www.vestnesis.lv/index.php?menu=doc&id=118618 [skatīts 16.11.2008.]
2. Bībele. Vecās un Jaunās derības svētie raksti. London: The British and Foreign Bible Society, 1967, 83.lpp.
3. Case of Pretty v. The United Kingdom, Application no. 2346/02, Strasbourg, 29 April 2002. Final Judgment 29/07/2002. The European Court of Human Rights. Available: http://cmiskp.echr.coe.int/tkp197/view.asp?item=3&portal=hbkm&action=html&highlight=euthanasia&sessionid=40520458&skin=hudoc-en [looked through 18.12.2009.].
4. Cilvēktiesību un pamatbrīvību aizsardzības konvencija. 1998.gada 1.novembris. Pieejams: http://www.coe.lv/konv_sar.php?kid=5 [skatīts 21.07.2010.].
5. Deklarācija par eitanāziju. *Kristīgā Avīze Solis*. 1996. 28.jūnijs - 4.jūlijs, nr.23.
6. Dinģelis M. Tiesības dzīvot un tiesības mirt. *Diena, pielikums SestDiena*. 1996. 11.maijs, nr.110.
7. Dworkin G., Frey R.G., Bok S. Euthanasia and Physician-Assisted Suicide. For and against. United Kingdom: Cambridge University Press, 1998, p.110.-111.
8. Gabre A. Tiesības uz nāvi. *Rīgas Balss*. 2001. 4.janvāris, nr.3.
9. Gavare J. Latvija var! Tikai ārstēt. 2008. 7.novembris. Pieejams: http://www.db.lv/sakums/latvija-var/latvija-var-tikai-arstet-170986 [skatīts 08.07.2011.].
10. Hipokrāta zvērests. Grām.: Sīle V. *Medicīnas ētikas pamatprincipi*. Rīga: izdevniecība "Zinātne", 1999, 140.lpp.
11. Islamic Religious Leadership Council Rules Against Euthanasia, Assisted Suicide. *Catholic World News Brief*. 16 July 2003. Available: http://www.euthanasia.com/islamic.html [looked through 08.07.2011.].
12. Исаев Ю.С., Воропаев А.В., Диллис А.Д., Караваева Е.И. Вопросы конституционного права. Доступен: http://www/law.isu.ru/ru/science/vestnik/20044/isaev.html [просмотрен 07.03.2005.].
13. Ивченко О.С. Уголовная ответственность за эвтаназию в России. В кн.: *Уголовное право в XXI веке*. Москва: «ЛексЭст», 2002, С.141.
14. Jākobsons A. Žēlsirdība, kas var nogalināt. *Jaunā Avīze*. 2000. 8.decembris, nr.286.
15. Капинус О.С. Эвтаназия в свете права на жизнь. Москва: Издательский дом «Камерон», 2006, С.255.
16. Котельников В.П. От Гиппократа до наших дней. Москва: издательство "Знание", 1987, С.58.
17. Krišjānis M. Mēs cenšamies uzbūvēt dzīvi bez lielām un liekām ciešanām. *Mediķu ziņas*. 1996. 5.jūlijs, nr.22.
18. Loi du 16 mars 2009 sur l'euthanasie et l'assistance au suicide: Recuel de legislation. *MEMORIAL Journal Officiel du Grand-Duché de Luxembourg*. 2009. 16 mars, A — N°46. Available: http://www.legilux.public.lu/leg/a/archives/2009/0046/a046.pdf [looked through 07.07.2011.].
19. Medical and life ethics. Available: http://*www.bbc.co.uk/religion/religions/mormon/features/medical.shtml* [looked through 11.03.2005.].
20. Мишаткина Т.В., Денисова С.Д., Яскевич Я.С. Биомедицинская этика. Учебное пособие. Минск: Тетра Системс, 2003, С.99.
21. Nikers O., Fridrihsone M. Vai esam gatavi lemt Nāves vietā. Eitanāzija Latvijā - ārsti PRET, politiķu domas dalās. *Jaunā Avīze*. 2001. 24.janvāris, nr.20.
22. Pohodņeva M. Nepadariet ārstus par slepkavām. *Jaunā Avīze*. 1998. 30.marts, nr.75.
23. Rachels J. The End of Life: Euthanasia and Morality. London: Oxford University Press, 1987, p.214.
24. Saulīte J. Advokāte: eitanāziju nedrīkst legalizēt. *LETA*. 2000. 29.novembris. Pieejams: http://www.leta.lv/latvian/arhivs/arhiveitem.asp?ItemID={E47D9C1E-C466-11.D4-9AF1-00A0C9FC2011}&Phase= eitanāzija [skatīts 18.01.2005.].
25. Termination of Life on Request and Assisted Suicide (Review Procedures) Act. Available: http://www.euthanasie.org/nvve-english/pagina.asp?pagkey=72087 [looked through 07.07.2011.].
26. The Belgian Act on Euthanasia of May, 28th 2002. Available: http://www.kuleuven.be/cbmer/viewpic.php?LAN=E&TABLE=DOCS&ID=23 [looked through 07.07.2011.].
27. Уиклер Д., Брок Д., Каплан А. Этика. На грани жизни и смерти. Краткий очерк современной биоэтики в США. Москва: издательство "Знание", 1989, С.33.
28. Valsts Cilvēktiesību biroja 2002.gada 30.janvārī rīkotās apaļā galda diskusijas "Cilvēktiesības un eitanāzija Latvijā" materiāli.

THE BARRIER-FREE WORKPLACE FOR DISABLED PEOPLE

BEZ ŠĶĒRŠĻIEM BRĪVAS DARBAVIETAS CILVĒKIEM AR INVLIDITĀTI

Marga Živitere, Dr. oec.
Information Systems Management Institute
91 Ludzas, Riga, Latvia, LV-1003
E-mail: marga.zivitere@isma.lv, telephone: +371 67100589

Viktorija Rjaščenko, Dr. oec.
Information Systems Management Institute
91 Ludzas, Riga, Latvia, LV-1003
E-mail: viktorjas@gmail.com, telephone: +371 67100607

Abstract. According to the European Disability Strategy 2010-2020, to achieve the EU's growth targets, more people with disabilities need to be in paid employment on the open labour market. The purpose of this article is to examine and discuss the main barriers and the reduced opportunities of employment for disabled people from employers' side. In this context, on the basis of review of the literature and experts' interviews the particular criteria for an identification of the main barriers and methods to reduce them, as well as suggestions and recommendations for further improvements specifically in Latvia are made. The study is based on research Information Systems Management Institute conducted within European Community Leonardo da Vinci projects 'Ability not Disability in Employment' (2003-2005), 'Increasing Employability of Disabled People' (2008-2010) and 'Ability not Disability in the Workplace' (2009-2011). Three surveys were carried out, both analyzing the situation in Latvia in the context of the European Union. The first survey compared the situation in Latvia and Luxemburg, the second – the situation in Latvia, Bulgaria and Turkey, the EU candidate country, and the third – the situation in Latvia, Germany, Italy and Lithuania. The paper has been prepared with the financial support of the EU Commission.

Key words: Latvia, barrier-free workplace, main barriers, reducing barriers.

Introduction

One of the new dimensions in the development of society is the new Strategy to barrier-free workplace for disabled people (European Commission, 2010b, p. 4). In his preface to the EU's *Europe 2020 strategy* José Manuel Barroso stresses that Europe has to emerge stronger than it was previously from the economic and financial crisis. While "the crisis has wiped out years of economic and social progress and exposed structural weaknesses in Europe's economy," it is essential and achievable to "turn the EU into a smart, sustainable and inclusive economy delivering high levels of employment, productivity and social cohesion" (European Commission, 2010a, p. 5). *Europe 2020* puts forward three mutually reinforcing priorities: smart growth; sustainable growth; and inclusive growth. It is explained that smart growth means developing an economy based on knowledge and innovation – an area, where universities together with the business sector and representatives from the political system at different levels (national and supranational or European) are the key players. In another European document – *European Disability Strategy 2010-2020,*it is emphasised that "full economic and social participation of people with disabilities is

essential if the EU's Europe 2020 strategy is to succeed in creating smart, sustainable and inclusive growth" (European Commission, 2010b, p. 4).

As it is stated in the *European Disability Strategy 2010-2020: A Renewed Commitment to a Barrier-Free Europe*, "One in six people in the European Union (EU) has a disability that ranges from mild to severe making around 80 million who are often prevented from taking part fully in society and the economy because of environmental and attitudinal barriers. For people with disabilities the rate of poverty is 70 % higher than the average partly due to limited access to employment. Over a third of people aged over 75 have disabilities that restrict them to some extent, and over 20 % are considerably restricted. Furthermore, these numbers are set to rise as the EU's population ages. The EU and its Member States have a strong mandate to improve the social and economic situation of people with disabilities" [13, p.3]. In this strategy employment is mentioned as one of eight main areas of action and it is stressed that the EU action will "enable many more people with disabilities to earn their living on the open labour market" (European Commission, 2010b, p. 7).

In the context of European strategy, the analytical review of the current situation of the worldwide economic crisis and tendency of the employment of disabled people, in particularly, gets critical by the reduction their employment opportunities, because employers dismiss the first disabled people (see figure 1).

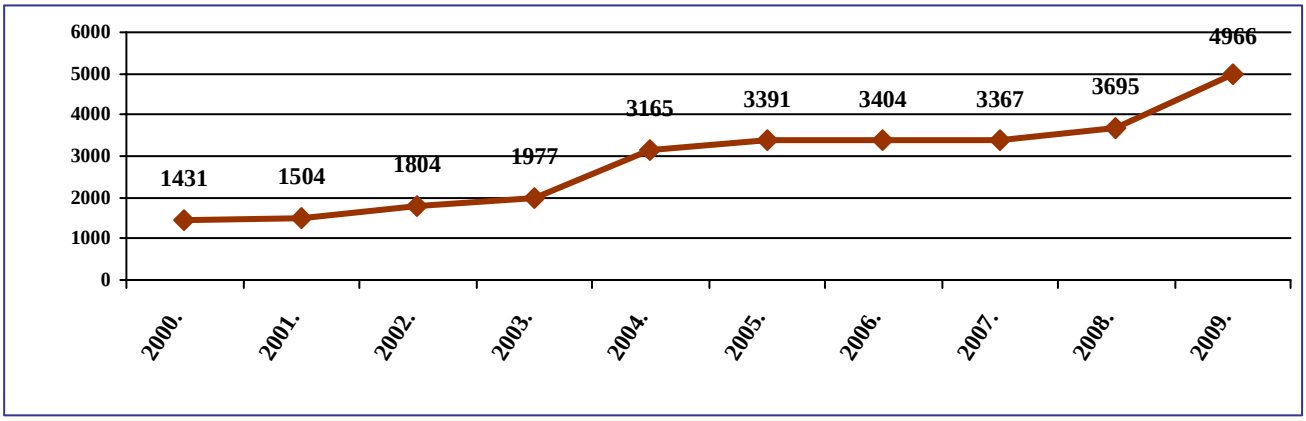


Figure 1. The registered number of unemployed disabled people in Latvia (on February 28, 2009)[34]

This figure shows that the registered number of unemployed disabled people from 2000 till 2009 dramatically increased (by 3 and half) in Latvia. The tendency is extremely negative and this tendency is long-term, but not only connected with the current economic crises.

[34] State Employment Agency of Latvia. Available in http://www.lm.gov.lv/text/151.

Using the experience of work on different European projects depicting the barriers to employment for people with disabilities, in this research, the authors search for the ways to reduce the barriers in recruitment and employment of people with special needs, promote evidenced-based practices and systems change that increase employment opportunities for this group of people. The research is focused on the demand from employer's side of the workforce development system in order to understand better what works in promoting effective practices and systems change. This will decrease the barriers to employment people with disabilities und increase employment opportunities for people with special needs.

Research methods

Much has been written about the barriers faced by disabled people in their attempts to access the labour market (e.g. Barnes. and Sheldon, 2010; Bruyère., Erickson & VanLooy, 2004; Bučiūnienė, Kazlauskaitė, 2010; Roulstone, 2000, 2002, 2004a, 2004b;. Roulstone et al, 2003; Roulstone and Barnes, 2005; Waldschmidt, 2009). The topic - the barriers-free workplace has been given rather limited research attention in the Latvia so far (Ilena, 2007; Korņiljevs, Ļubkina, 2011; Živitere, 2007, 2008, and 2011). For all that, when the time comes to recruit, hire and promote, people with disabilities are often overlooked. Every employer looks for to hire qualified people, and want to draw them from the largest possible "pool" of candidates. This "pool" will include people with disabilities - who comprise a productive sector of the workforce today.

This survey on the barrier-free workplace for people with disabilities was carried out within the framework of Leonardo da Vinci project "Ability not Disability in Workplace" (AnDiW, 2009-2011) which is the previous Leonardo da Vinci transfer of innovation project "Ability not Disability in Employment" (AnDE, 2003-2005). The present study includes the questions on topics which have previously been covered in earlier research studies looking at the employment of people with disabilities, from the employer's side, in the enterprises in Latvia[35]. The aim of this research is an interest to evaluate a tendency of the barriers and changes in the reduction of barriers to compare these earlier findings with those of the present study. In both cases the studies have included questions on the following issues:

- the main barriers to employment for people with disabilities in the workplace;
- the most effective means of reducing barriers to employment for people with disabilities;

[35] Please note that care should be taken in drawing conclusions about changes over time as the surveys differed in design, population and question wording and context. These differences will affect the findings to an unknown extent.

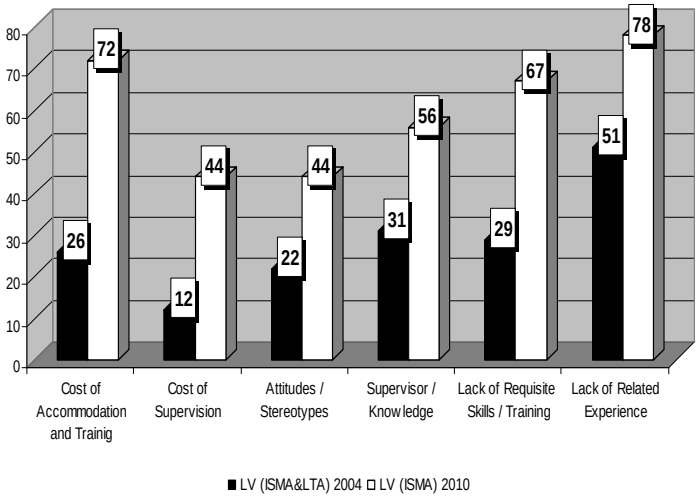
- reducing or making changes regarding barriers to employment of people with disabilities in the workplace.

The studies of barrier-to workplace for people with disabilities nowadays were made on the basis of information gained, of employers' and experts' quantitative and qualitative questionnaires as comparisons with previous studies within the framework of the Pilot Project (AnDE) conducted in 2004 by the Latvian Traders' Association and Information Systems Management Institute. The first studies included 966 respondents: employers or representatives of their enterprises. 74% of those represented medium enterprises, 24% represented small enterprises and 2% represented large enterprises[36]. In preparation for the 2nd survey the same methodology was used as in 2004. The second round of survey was carried out in 2010 year but only in the Republic of Latvia. In the second survey were selected the largest and the most important companies of various branches, the respondents who are less connected with people with health problems were excluded, so it was expected that the results of questionnaires would represent the widest spectrum of problems.

An interview with respondents on issues was related to, in the first - the identification of the main barriers to recruitment and employment people with disability into the workforce; in the second - the difficulties and organizational benefits of such practices from a business perspective

Results and Discussions

In the first part of the survey *the main barriers to employment for people with disabilities in the workplace* the researchers identified six main barriers (Figure 2).



As it is shown on the figure 1, the ratings of the main barriers in answers of the respondents' in the first and second questionnaires were considerably different. Respondents of the second survey indicated lack of related experience as the main barrier (78%)while the respondents

[36] Annex 5. Research results about the employment of people with disabilities in enterprises in Latvia and Luxembourg (2005). *In Annex to the Distance Education Course "Employment of People with Disabilities"*. SIA "Mācību grāmata", Riga, p. 48-52; AnDiw (2009-2011). Information Systems Management Institute. *The questionnaires*.

of the first survey rated its importance only in the Figure 2. Percents Reporting Barriers to Employment for People with Disabilities (Latvia, 2004 and 2010) fourth position (61%); cost of accommodation and training (72%); lack of requisite skills/ training (67%). The above mentioned barriers had the tendency to increase a role of costs. These conclusions were used for further second and third group of questionnaires.

The second group of questionnaires *the most effective means of reducing barriers to employment for people with disabilities* (see Figure 3): Visible Top Management Commitment (82% - 2004); Employer Tax Incentives (78% - 2010 against 26% -2004). The respondents – representatives of the companies, participating in the survey believe that the barrier reduction measures will lead to tax saving policy, for the companies make their performance according to their strategic plans, which are profit orientated. Thus, if the state granted more tax saving incentives, more companies would hire people with disabilities.

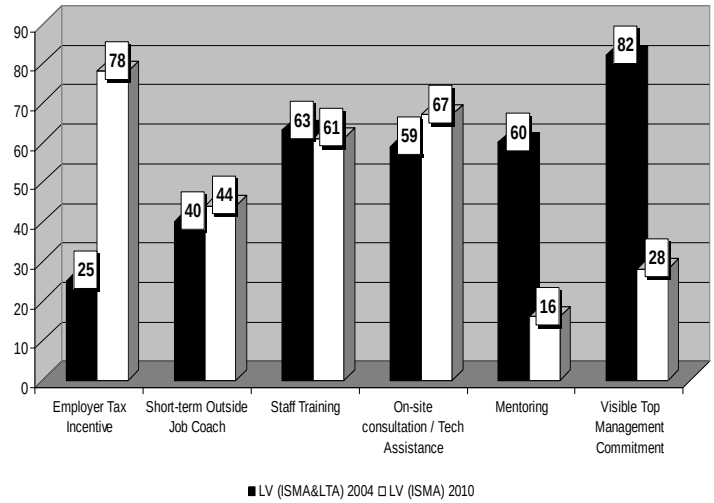


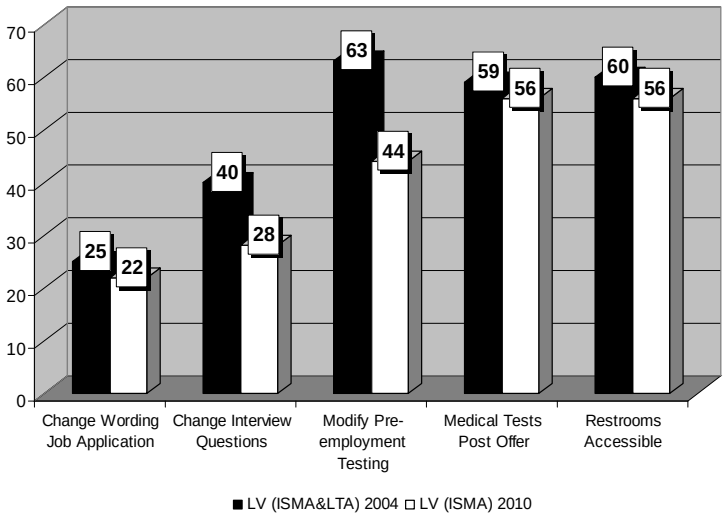
Figure 3. Percents Reporting Effective & Very Effective Measures of Reducing Barriers to Employment of Persons with Disabilities (Latvia, 2004 and 2010).

The third stage of the survey deals with the questions aimed at reducing or making changes in the barriers to employment of people with disabilities, they give the idea of how to reduce barriers and make changes in employment policy of the enterprises which hire people with disabilities. The analysis of the answers of the respondents will be taken as the basis for the future research work (Figure 4).

Figure 4. Percents Reporting Difficulties or Utmost Difficulties to Make Changes in the Employment policy of People with Disabilities (Latvia, 2004 and 2010).

Ratings of the main barriers by the respondents in 2004 and 2010 are not considerably different. The respondents indicate barriers of modify pre-employment testing (63% against 44%), restrooms accessible (56% against 60%) and medical tests post offer (56% against 59%).

Testing experts on the current situation, most companies prefer to hire people with disabilities only part-time or for hourly rate wages that relate to the fact those companies have not



had experience in recruitment of these people before. And certainly, every businessman who deals with a person with disabilities for the first time would like to insure such employee's professionalism and efficiency. As a result many companies in Latvia don't want to hire people with special needs full-time.

The biggest concern for businesses is the cost of adaptation, because they are very high. Consequently, it dramatically affects the company's production cost and the whole business. Entrepreneurs are also ignorant of the adjustment costs as such, for the information on this topic is not easily found in the public sources.

Answers of survey questions show positive attitudes towards people with disabilities on the part of companies employees, they are ready to provide necessary assistance and support, both moral and professional to people with special needs, working in their companies . This fact proves the positive changes in the social mentality of people in Latvia when compared with earlier times: people want to accept the other person, despite the fact that this person has special needs and his or her abilities are somehow limited.

The most unfavorable fact which the survey shows are that entrepreneurs are aware only of tax saving policy that will be available, recruiting people with special needs, but they are not sufficiently informed about the subsidies and other financial aid, and sometimes even misinformed about available benefits, if the company hires disabled people. Thus, it often happens that people with special needs are not hired because of employer's lack of information on these issues, as well as their ignorance about the subsidized public funds, European Social Fund benefits, the State Employment Agency projects.

Conclusions

The survey shows a considerable number of problems in economic, legal and social sectors, which influence the employment of disabled people in Latvia.

Summing up the results of the research with the aim to attract the attention of Latvian society and the representatives of the business world in particular towards *reducing barriers to employment of people with disabilities*, the authors of the article came to the conclusions mentioned below.

1. In general Latvian companies play a passive role in recruiting people with special needs, especially those that have never considered hiring a disabled person. They believe that Latvian public associations and foundations should be the first to offer disabled people a job option.
2. The conducted survey in the frames of the research shows a considerable number of problems in economic, legal and social sectors, which influence the recruitment and employment of disabled people in workplace as well as depicts the fact that the majority of representatives of the business world in Latvia are ignorant about all the benefits for the companies if they recruit a person with special needs in particular the subsidized public funds, European Social Fund benefits, the State Employment Agency projects.
3. Representatives of mass media should inform society about people with disabilities, their employment needs, problems and their potential. However there are many ways to improve the employment situation for disabled people at the present moment and in the future.
4. The research results from a quantitative and qualitative study conducted in 2004 and 2010 consisting of one-to-one findings specify the presence of development tendency to decrease the barriers towards recruitment and employment disabled workers compared with soviet reality.The present economic downturn has had an adverse impact on the situation of people with disabilities, making a call for society to act urgently.
5. There are positive changes in the social mentality of people representing all layers of the Latvian community, they are wanting to change the situation in recruitment of people with special needs to the best, to reduce barriers towards their recruitment, to create and guarantee all the necessary conditions for their active, harmonious life with all its values, using the experience of the developed countries of the world.

References

1. AnDE Project (2003-2005) *Ability not Disability in Employment*, European Community Leonardo da Vinci action programme. http://www.ande.isma.lv (2006 05 12)
2. AnDiW Project (2009-2011) *Ability not Disability in Workplace*, European Community Leonardo da Vinci transfer of Innovation project. Under the Lifelong Learning Programme. Project nr. 2009-1-LV1-LEO05-00370.
3. Annex 5. Research results about the employment of people with disabilities in enterprises in Latvia and Luxembourg (2005). *In Annex to the Distance Education Course "Employment of People with Disabilities"*. SIA "Mācību grāmata", Riga, 48-52.

4. ANO Konvencija par personu ar invaliditāti tiesībām/ ratificēta 03.02.2010. // www.lm.gov.lv
5. European Commission (2010a). *Europe 2020: A strategy for smart, sustainable and inclusive growth.* Communication from the Commission, Brussels, 3.3.2010 COM (2010) 2020 final. Retrieved January 27, 2011, from http://eur-lex.europa.eu
6. European Commission (2010b). *European disability strategy 2010-2020: A renewed commitment to a barrier-free Europe*. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Brussels, 15.11.2010 COM (2010) 636 final. Retrieved January 27, 2011, from http://eur-lex.europa.eu
7. Barnes, C. and Sheldon, A. (2010). Disability, Politics and Poverty in a Majority World Context, *Disability & Society*, Vol. 25, No. 7, 2010, pp.771-782.
8. Bruyère, S., Erickson, W., & VanLooy, S. (2004). Comparative study of workplace policy and practices contributing to disability nondiscrimination. *Rehabilitation Psychology*, 49(1), 28-38.
9. Bučiūnienė, Kazlauskaitė, R. (2010) Integrating people with disability into the workforce: the case of a retail chain. In *Equality, Diversity and Inclusion: An International Journal*, Vol. 29 Issues: 5, pp.534 – 538. The current issue and full text archive of this journal. Is available at www.emeraldinsight.com/2040-7149.htm.
10. Ilena, I. (2007). Employment opportunities for the people with disabilities. In *THE BOOK OF REVIEWED CONFERENCE ABSTRACTS: 1st International and Interdisciplinary Conference "FIHUSO-2007" merging Physical Sciences, the Humanities and Social Sciences, 18 – 19 May, 2007, Kaunas, Lithuania* (pp. 131). Vilnius – Kaunas, 2007.
11. International Federation of Persons with Physical Disability (FIMITIC). EDF Statement on Economic Crisis: Disabled people must not pay for crisis. Crisis, Paris - 16 November 2008 - The European Disability Forum. Available on: http://www.fimitic.org/content/edf-statement-economic-crisis-disabled-people-must-not-pay-crisis
12. Ministry of Welfare (2009). State Employment Agency of Latvia. Available in http://www.lm.gov.lv/text/151
13. Korņiljevs, I., Ļubkina, V. (2011). Situation Analysis of Persons with Disabilities in Latvia. In: *SOCIETY, INTEGRATION, EDUCATION*. Proceedings of International Scientific Conference May 27th-28th, 2011. Vol. II. Rezekne, 2011. p. 497-506.
14. Research results about the employment of people with disabilities in enterprises in Latvia and Luxembourg (2005). *In Annex to the Distance Education Course "Employment of People with Disabilities"*. SIA "Mācību grāmata", Riga, 48-52.
15. Roulstone, A., Gradwell, L., Price, J. and Child, L. (2003). How disabled people manage in the workplace. Thriving and surviving at work. Disabled people's employment strategies 45 p. JOSEPH ROWNTREE FOUNDATION. Is available at http://www.jrf.org.uk/publications.
16. Živitere, M., Člaidze, V. (2011). Legal Environment, National Strategies and Policies for Employment of People with Disabilities. In *International Conference Current Issues in Management of Business and Society Development – 2011. CONFERENCE PROCEEDINGS Riga, May 5-7, 2011.* (pp. 871-879). Riga, University of Latvia.
17. Živitere, M. (2008). The Barriers to Employment for People with Disabilities. In Sbornik E-learning ového portálu a kurzů byl spolufinancován Evropským sociálním fondem, státním rozpočtem České republiky a rozpočtem hlavního města Prahy / Sbornik pŗispēvkū konference. Praha, 27.června 2008, p. 48-57.
18. Živitere, M. (2007). THE EMPLOYMENT OF PEOPLE WITH DISABILITIES. In THE BOOK OF REVIEWED CONFERENCE ABSTRACTS: 1st International and Interdisciplinary Conference "FIHUSO-2007" merging Physical Sciences, the Humanities and Social Sciences, 18 – 19 May, 2007, Kaunas, Lithuania (pp. 151). Vilnius – Kaunas, 2007.
19. Waldschmidt, A. Disability Policy of the European Union: The Supranational Level, ALTER - European Journal of Disability Research / Revue Européenne de Recherche sur le Handicap, Vol. 3, No. 1, 2009, pp.8-23.

Appendix 1

ECDL 5.0 / ICB 3.0	1. Concepts						2. Files					3. Texts				4. Tables and Data						6. Slides				7. Web, Communication								13. Project Planning						Team+Organisation					
	Hardware	Software (+ development)	Networks	Environment, Health etc	Law (Pers. Data, Copyright)	Security Concepts	Operating Systems	Files Management	File types, Compression	Securing Data	Webbased Cooperation	Text Creation, Formatting	Drawings and Tables	Structured text	Tools (Mail Merge, Spell etc)	Data organisation	Formulas, Functions	Sort, Filter, Querys	Pivot Table, Data Table etc	Macros, Data Forms	Charts	Layout, Design	Standard text elements	Drawings, Tables, Charts	Animation, Presenting	Understand Internet	Web, Information retrieval	e-mail, contacts, netiquette	Chat, Conferencing	Social Networking	Lists, Forums, Poll	Web Authoring, HTML, CMS	Sharing photos, blog etc	WBS, Gantt chart, Relationshi	Recource management	PERT analysis, Critical Path	Monitoring	Project Portals	Risk Analysis, Templates	Calendars, Reminders	Tasks, Assign and Monitor	Timesheets	Staff Management Systems	Client Support Systems	IT Services Management
1 Technical competence																																											
1.01 Project management success		+	+	+	x	+	+	X	x	x	x	x	x	x	+	X	x	+			+	x	+	+	+	+	+	X	+	+	+	+	+	x	x	x	X	X	X	x	x	+	+	+	+
1.02 Interested parties		+		+	+	x	+	x	x	X	X	x	X	x	+	x	+	+			x	X	x	x	x	+	+	X	x	x	x	x	x	+	+	+	x	X	X	+	+	+	+	X	
1.03 Project requirements & objectives		+		+		+		X		x	x	x	X	x		X	X	+			x	x	+	X	x	+	x	x	x	+	+	+	x	X	x	x	X	X	+	+	+			+
1.04 Risk & opportunity	+	+	+	x	x	X		x	+	x	x	x	X	x		X	x	x	+	+	x	x	+	x	x	x	x	x	x	+	+		X	X	x	x	X	X	X	X	+	+	x	x
1.05 Quality		+		+	+	+	+	X	x	+	x	x	x	x	x	x	+	x			+	+	+	+	+		x	x	+	+	+	+		+	+	+	X	X	X	+	+	x	x	x	x
1.06 Project organisation		+		+	+	+		X	+	+	x	x	X	x	+	x		+				+	+	+	+		+	x	x	x	x	+	+	x	X	+	x	x	X	X	X	x	x	+
1.07 Teamwork	+	+	+	x	x	x	x	x	x	x	X	+	+	+	+	+					+	X	x	x	X	+	x	X	X	X	x	x	x	X	X	+	x	X	X	X	+	x	x	+
1.08 Problem resolution	+	x	+	+	+	x		x	+	x	X	+	+	+		+		+			+	+	+	+	x	+	x	x	+	+	+	+	+	x	x	X	X	x	X	x	x			x	+
1.09 Project structures		+			+	+	+	x	+	+	x	x	x	x	X	+	x	x	x	+	+	x	x	x	x	+	x	x	+	+	+	+	+	x	x	+	x	x	x	x	x	+	+	x	x
1.10 Scope & deliverables		+		+	+	+		x		+	+	x	x	x	X	+	x	x	x	+		+	+	+	+		x	x	x	+		+	+	X	X	X	X	x	x	+	x	+		x	+
1.11 Time & project phases		+		x	+	+		x		+	x	x	x	x	x	+	x	x				+	+	+	+		x	x	+	+	+			X	X	X	X	x	x	X	x	x	+	+	
1.12 Resources	+	+	+	+	+	+		x		+	x	x	x	x	+	x	x	x	+	+	x	+	+	+	+	+	x	x	+					X	X	X	X	X	X	X	x	x			
1.13 Cost & finance		+		+	+	+		x		+	x	x	X	x	+	x	x	x	+	+	x	x	x	x	x	+	x	x	+					X	X	X	X	x	X	x	+	+	X	x	+	+
1.14 Procurement & contract		x	+	x	x	x	+	x	x	x	x	x	x	x	x	x	x	+			x					+	x	x	x	+				X	X	X	X	X	X	x	x	x	+	x	x
1.15 Changes		+		+		+	+	x	x	x	x	x	x	x	x	x	x	x	+	+	x					+	x	x	x	+	+			X	X	X	X	X	X	x	x	x	+	x	+
1.16 Control & reports		x		x	x	x	+	x	x	x	x	x	x	x	x	x	x	x	+	+	x	x	x	x	x	+	x	x	x	+	+	+	+	X	X	X	X	X	X	x	x	x	+	x	+
1.17 Information & documentation	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	X	X	X	X	X	X	x	x	x	x	x	x
1.18 Communication	+	x	+	x	x	x	x	x	x	x	x	x	x	x	x	x	x	+	+	+	x	x	x	x	x	x	x	x	x	x	x	x	x	+	+	+	x	X	x	x	x	+	+	x	x
1.19 Start-up		x		x	x	x		x		x	x	x	x	x	+	x	x	+			x	x	x	x		x	x	x	x	x	x	x	x	x	x	X	x	X	x	x	+		x	
1.20 Close-out		x		x	x	x		x	x	x	x	x	x	x	x	x	x	x	+	+	x	x	x	x		x	x	x	x	x	x	x	x	x	x	X	x	X	x	x	x	+	x	x	+
2 Behavioural competence	+	x	+	x	x	x	+	x	x	x	x	x	x	x	x	x	x	x	+	+	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	X	x	X	x	x	x	x	x	x	x	x
3 Contextual competence	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	X	x	X	x	x	x	x	x	x	x	x
Maximum level for all ICB competences	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	X	x	X	x	x	x	x	x	x	x	x
Importance for all ICB competences	+	+	+	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	+	+	x	x	x	x	x	x	x	x	x	x	x	+	+	x	x	X	x	X	x	x	x	x	x	x	x	x

Legend : **+/x/X** - minimal/core/advanced level IT-skill or knowledge required in project management

„New Dimensions in the Development of Society"

ISBN 978-9984-48-052-7

Latvia University of Agriculture
Faculty of Social Sciences
Liela Street 2
Jelgava, Latvia
LV – 3001
Web page: www.llu.lv
e-mail: szfdek@llu.lv