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INTRODUCTION

Ineta Luka, Dr.paed., Prof.
Editor-in-chief of the Journal of Turiba University
Acta Prosperitatis, No.6

The twenty-first century has brought many challenges for economies and societies. Addressing the human and social consequences of an international financial crisis, meeting development goals, encouraging green growth and responding to climate change, ageing societies and the knowledge economy (OECD Indicators of Education Systems, 2012) are the key issues at the centre of international debate nowadays. Increased mobility, the world-wide web, and the instant information spread place people in previously unknown contexts and situations which require immediate analysis, decision-making and problem-solving. Traditional approaches to these often seem ineffective and therefore new tools and methods have to be applied. This situation sets new targets for education providers worldwide.

The current century is also addressed as the “age when the word ‘knowledge’ is encountered more often as an adjective (knowledge economy, knowledge society, knowledge management)” (Holford, 2014:7), which points to the increasing role of universities whose mission is not only to educate future specialists but also encourage change and innovation. The role of higher education becomes especially significant when addressing the long-term and short-term needs and development possibilities of a society. As indicated by Collini (2012: 3) “never before in human history universities have been so numerous and so important”. Moreover, higher education is at the forefront of policy and political debate (Hollford, 2014), “higher education, research and innovation play a crucial role in supporting social cohesion, economic growth and global competitiveness” [...] as well as it “is an essential component of socio-economic and cultural development” (ESG, 2015: 6).

The changes of the last decade have also affected the educational landscape. The educational paradigm has changed from “input-based to output-based education (competence-based, learning outcomes)” (Recommendations from Professional Higher Education 2015 Yerevan Ministerial Conference, 2015: 3), which provides new opportunities for learners and educators and at the same time requires new competencies.

This has also resulted with setting new targets for European Universities. The main priorities set for the period till 2020 are strengthening the quality and relevance of learning and teaching, ensuring student-centred learning, fostering the employability of graduates throughout their working lives, providing lifelong access to learning for a diverse student body, developing and implementing effective internationalisation strategies (Trends 2015, 2015; Yerevan Communiqué, 2015).

This supports earlier expressed vision concerning the necessity to enhance students' advanced knowledge, skills and competences needed throughout their professional lives (Louvain-la-Neuve Communiqué, 2009), foster “creativity and innovation, including entrepreneurship, at all levels of education and training” focusing on developing skills that would increase people’s employability (ET 2020, 2009), such as the capacity for applying knowledge in practice, the capacity to adapt to new situations, concern for quality, information management skills, the ability to work autonomously, team working, planning and time management, oral and written communication in one’s native language and foreign languages, and interpersonal skills (Universities’ Contribution to the Bologna Process, 2008; Competence-based Learning, 2008; A Tuning Guide to Formulating Degree Program Profiles, 2010).

It goes hand in hand with the recent trend in many parts of the world creating and/or updating frameworks for employability skills – the skills that are relevant for the future labour market as well as essential in ensuring people’s professional and personal development and the development of the society in general. This is topical both in the university context where “graduates are expected to be competent in a broad range of areas, comprising both field-specific and generic skills” (Allen & van der Velden, 2009: 71), where students have to be “equipped with knowledge, skills and core transferable competences they need to succeed after graduation” (Quality and Relevance in Higher Education, 2014), and therefore they need to upgrade occupation-specific skills and such transversal skills as communication, team-working, self-management, creativity, and innovation (Learning while Working, 2011) as well as in the lifelong and lifewide learning contexts.

This is also supported by the European Association of Institutions in Higher Education (EURASHE) that emphasise the three-fold mission of professional higher education – teaching, research and services to the community, the scope and focus of which depend on the specific profile and mission of the given institution. “Professionally-oriented institutions and programmes with their close links to the world of work and regional embedding, emphasise the key role of learning and share a broad interpretation of innovation and research aiming at practical applications and product development” (Recommendations from Professional Higher Education 2015 Yerevan Ministerial Conference, 2015: 2).

However, at the core of these processes there are people. People who are ready to share their knowledge and expertise with others, people who are ready to learn and raise their knowledge and increase competencies to contribute to the development of a society.

The contribution of higher education to jobs and growth, and its international attractiveness, can be enhanced through close, effective links between education, research, and innovation – the three sides of the ‘knowledge triangle’ (Knowledge Triangle and Innovation, 2015). This is where the mission of universities demonstrates practical benefit to the society.

The current issue of the Scholarly Journal of Turiba University *Acta Prosperitatis* is the sixth issue of the Journal. The unifying theme of this multidisciplinary issue is the development of employability skills in compliance with the stakeholders' needs and it addresses the issues that are significant towards meeting development goals of the society and better employability.

Three papers of the current issue are devoted to the topic of education change. They focus on explanation of legal enactments, analysis of the field statistics and provide the results of the research in the given topic.

Joanna Kosmaczewska and **Mariusz Barczak** in their paper "Explaining and Measuring the Academic Attractiveness of Different Countries: Evidence from the Visegrad Group" analyse a topical issue for higher education – mobility and internationalisation in the Czech Republic, Slovakia, Hungary and Poland. The research is in line with the above-mentioned EU priorities for higher education, namely, student and professor mobility. In their paper the authors analyse the academic attractiveness of a host country. They claim that "students make decisions about their study abroad on the basis of many push and pull factors. As far as the country's attractiveness is concerned for incoming students, the country itself is unable to influence the push factors. While choosing an academic destination the majority of students mostly value the ability of learning new languages, experiencing other cultures and customs and making new friends. The only means countries can compete to attract the potential students' interest remain pull factors". Culture plays a significant role in choosing a destination and cultural awareness is one of the employability skills mentioned in other studies (Allen & van der Velden, 2009; Universities' Contribution to the Bologna Process, 2008) regarding the skills and competencies necessary in the future. The authors focus on analysing government support, academic standing, cost and safety of living in the host country and the tourist attractiveness as dimensions of academic attractiveness of a host country for inbound mobility. The findings of the research indicate that those are not significant factors when choosing a destination. The authors conclude that "the only solution for increasing mobility may be the strategies of internationalization and mobility developed at the level of Ministries in respective Member States".

Agita Doniņa and **Tamāra Grizāne** in their paper "Tourism, Research and Education" explore topical improvements in Latvia's tourism education and current background processes in the European Education Area. The authors argue that nowadays tourism employees "must have highly developed communication skills as emotional intelligence is as important as intellectual intelligence and only a combination of both can guarantee success in the modern labour market while working within an international team". The authors provide a brief historic overview of the background concerning the development of tourism higher education as well as characterise tourism higher education in the framework of European higher education area and introduce readers with the situation in Latvian higher education providing the analysis of relevant legal regulations that stipulate higher education in Latvia. The analysis shows that in 2013 there were 13 higher education

institutions in Latvia offering 18 tourism programmes. The study analyses the demand and supply in terms of the tourism market and concludes that there is a limited request for vacancies which the authors explain by the fact that “the tourism sector is an active labour market as jobs in this sector are highly in demand”. The main conclusion from the study is as follows: “the accession of the higher education system of Latvia to the Bologna Declaration principles gradually promotes the twining of academic and professional education, thus raising attention to the employment, competitiveness, and the opinion of the employers regarding postgraduates of second level higher education”.

Jana Poláchová Vašátková and **Michaela Prášilová** in their paper “Concept of Czech School Autonomy” analyse the current progress of the process of the Czech school change into an autonomous organization focusing on the pedagogical school autonomy and the readiness of the executive staff to manage their new role. The authors analyse the documents of the Czech educational and school policy of the past two decades (e.g. strategic documents, development planning documents, regulations, evaluation and monitoring reports etc.) and relevant national research findings related to the management of Czech schools from this period. The authors stress that “the change is a process of three interconnected phases: initiation, implementation and incorporation. The success of each of the phases can be positively or negatively influenced by certain factors in schools where the change is implemented”. The authors explain all the three stages of the change process and the results attained in each of them. They conclude that “even after ten years the considered change is still in the implementation phase”, which requires the change of paradigm from education to learning. This conclusion also coincides with the EU priorities in higher education reflected in the Yerevan *Communiqué* (2015) where student-centred learning is stressed.

People have an essential role in all changes therefore the issue of human resource is important. The paper “Features of Social Capital in Russia” by **Galina Karpova** and **Natalia Spiridonova** analyses social capital as an important factor of social development and the integration of society in modern conditions. The authors claim that “investment in social capital is a prerequisite for the proper functioning of the economy and determines the quality and rates of socio-economic progress”. According to Gauntlett (2011) in the past two – three decades, scholars have taken an interest in three different perspectives on social capital – based on the ideas of Pierre Bourdieu, James Coleman, and Robert Putnam. The approach adopted by Galina Karpova and Natalia Spiridonova is closer to the approach of James Coleman in which he recognises the value of social capital for all kinds of communities and as a source of useful everyday information. Similar to James Coleman, the authors argue that social capital “creates conditions for the functioning of the human capital”. The authors analyse social capital within an institutional framework for functioning of the society and economy pointing out that “social capital is a measure of adaptation of the society to market conditions and therefore it is a mandatory and significant economic factor”. Based on the research findings the authors conclude that “the research of institutional quality shows that the macro

institutional environment is one of the fundamental factors of economic growth, as well as of the geographic characteristics of countries and the level of ethno linguistic fragmentation of society. Ethno linguistic fragmentation factor may have a significant adverse effect on the functioning of institutions, especially in Russia because of its large territory, linguistic and religious differences. The institutional environment does not only mediate the influence of geography on economic growth, but it is the result of geographical features in a certain sense”.

Several papers of the current issue analyse aspects of developing employability skills at higher education studies. Thus, **Rita Birzina** in her article “Open Educational Resources – an Opportunity and a Challenge for Students” analyses the use of Open Educational Resources (OER) in higher education of Latvia. The author stresses the fact that “the use of OER is becoming more obvious as the issue of resource sharing opens up much wider possibilities of a structural and cultural nature”. Another term the author analyses is MOOCs (Massive Open Online Courses) and their role in higher education, which has also been stressed by the above-mentioned EURASHE report emphasizing their impact on creating “a totally new educational landscape and a huge change in the way of learning and in the learner’s profile” (Recommendations from Professional Higher Education 2015 Yerevan Ministerial Conference, 2015: 3). The analysis of legal regulations of Latvia conducted in the study reveals that OER and MOOCs “practically are not used in any of the official government documents”. Rita Birzina’s research has been conducted as a contribution to future collaborative studies in ASEM LLL Research Network 1, the topic “Pedagogical approach to lifelong learning through OERs”. The findings of the research derived from an online structured e-interview of 127 students of the University of Latvia clearly indicate that there is a considerable uncertainty in understanding of OERs in Latvia. At the same time the findings emphasize the following challenges in applying OERs: computer literacy, foreign language and information literacy skills needed for working with OERs. These are significant employability skills without which it is hardly possible to imagine successful operation in the labour market.

As stated above language competence is a significant employability skill. Language learning is an important EU priority as it is also a tool for mobility and intercultural understanding. The EU Language Policy postulates that multilingualism is an important component of increasing the EU competitiveness. “One of the objectives of the EU’s language policy is therefore that every European citizen should master two other languages in addition to their mother tongue” (*Language Policy*, 2015). Two papers of the current Issue of the Journal are connected with language learning and usage aspects.

The paper “Enhancing Employability Skills for Tourism and Hospitality Industry Employees in Europe” by **Ineta Luka** deals with the analysis of employability skills relevant for work in tourism and hospitality industry. The topicality of the study is underlined by the fact that tourism has turned into a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises,

and infrastructure development. The author analyses the results obtained in an international survey conducted in five EU countries: Latvia, Croatia, Slovenia, Italy and Romania. The study reveals findings from two international surveys – 85 language teachers and 131 top level managers of hospitality enterprises. Based on the theory analyzed the following employability skills for tourism and hospitality industry employees and students were defined: leadership, teamworking, collaboration skills, intercultural competences, presentation skills, communication skills, and an ability to use several languages at work. They coincide with the previous studies conducted in the field (*Learning while Working*, 2011; Robles, 2012; Kwok, Adams, Feng, 2012, etc.). Regarding language competences the following language skills have been analyzed to find out the significance of each of them as well: monological speaking skills, dialogical speaking skills, listening skills, writing skills and reading skills. The findings pointed to the significance of communication skills, collaboration skills and teamworking. Language teachers also emphasized intercultural competence. The findings showed the specific needs of each partner country, which are similar regarding English language competence, but vary regarding other foreign languages. The paper analyses employability skills and it points to the special role of languages in tourism where they are a primary tool for operating successfully. Language learning is not an isolated activity. Languages are learnt in professional setting and for the purposes of interaction. Language learning is not the aim but the means to become a professional in the field.

Tünde Péterfy in her paper “Painting in/and Motion Picture: Translatorial Pitfalls in James Joyce’s *Ulysses*” presents specific narratological techniques and other linguistic characteristics of James Joyce’s novel *Ulysses*. It deals with the difficulties a translator inevitably faces – regardless of the given target language – when trying to transpose the original text into his native language; it also presents some aspects of Joyce’s idiosyncratic ways of dealing with language, such as his ‘cross-linguistic vocabulary’, the rich variety in style, mood, perspective and register, the abundance of marked and unmarked quotations, internal and external allusions, literal allusions, etc. The paper demonstrates the necessity of good command of one’s mother tongue and foreign language competence in order to perceive the content of literary work as to the slightest nuances.

The majority of EU documents in the field of higher education emphasises creativity and innovation as significant factors of development and urges to change/adapt curricula in a way that would foster students’ creativity as creativity is a significant employability skill driving change. Creativity is among the skills that are “required by our global, knowledge-based economies. In particular, education must foster the skills that fuel innovation in the economy and society: creativity, imagination, communication and teamwork” (Ischinger, 2013: 3). Creativity has been on the agenda of higher education since the moment when higher education was facing “large economic, cultural and other macro-environmental challenges which are changing the role of universities from classical research universities (“ivory towers”) to entrepreneurial universities” in order to develop and implement “new research and transfer relationships within their respective regions” (Gaspar, Mabic, 2015: 599).

The paper “Interart Relation, Ekphrasis in Julie Taymor’s *Frida*” by **Enikő-Szidónia Sinka** shows the link between literature, paintings and films. It explores various ways in which Frida Kahlo’s paintings are (re)presented in the film. The first part of the paper outlines the theoretical framework of this research, surveying relevant discourses related to the relationship between painting and cinema. The second part of the paper provides a survey of the term *ekphrasis* and presents the term’s multifarious usage and the ways in which different scholars have defined it. The last chapter of the paper includes both a theoretical and a practical part which unfold as follows: firstly, the biopic about Kahlo has been approached in terms of narrative structure; secondly, the language of the film has been analysed; thirdly, in order to expand the analysis about the interart relationship between painting in/and cinema, Sager’s system of categorizing the cinematic ekphrasis has been employed, enriched with the author’s own ‘reading’ and interpretation of Kahlo’s oeuvre. The author concludes that “to make an analogy to this statement we could say that the relationship between film and painting can be defined using the terms of ‘host’ and ‘guest’ in which cinema plays the role of the welcoming guest, in a liminal space where coexistence is made possible”.

A significant occupation specific skill for entrepreneurs is numeracy and literacy, the ability to read and understand corresponding legal enactments as well as possessing good working knowledge of financial issues, including taxes. **Anna Medne** and **Sandra Medne-Jēkabsons** in their paper “Enterprise Income Tax and Social Insurance Mandatory Contributions of Small Enterprises in a Changing Environment in Post Crisis Latvia” analyse the changes in the normative enactments regarding enterprise income tax and mandatory social insurance contributions for small businesses during the period 2010–2015. The research deals with the following taxes: Personal income tax, State mandatory social guarantee payments, Enterprise income tax and Microenterprise tax. Irregularity and unpredictability of taxes impacts foreign investments in Latvian entrepreneurship and therefore it is an important issue to be solved. The authors conclude that “coordination of interests of taxpayers and tax administrators in a timely and reasoned manner is a necessary prerequisite for development of the taxation policy in the future”.

As stated above, today, the European Higher Education Area (EHEA) faces serious challenges. “It is confronted with a continuing economic and social crisis, dramatic levels of unemployment, increasing marginalization of young people, demographic changes, new migration patterns, and conflicts within and between countries, as well as extremism and radicalization. On the other hand, greater mobility of students and staff fosters mutual understanding, while rapid development of knowledge and technology, which impacts societies and economies, plays an increasingly important role in the transformation of higher education and research” (Yerevan Communiqué, 2015: 1). The current edition of the Journal is a contribution in this field to uncover some of the issues in the centre of the debate and provide scholars’ viewpoint and offer some solutions to the existing problems.

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OPEN EDUCATIONAL RESOURCES – AN OPPORTUNITY AND A CHALLENGE FOR STUDENTS

Rita Birzina, Dr.paed.
University of Latvia, Latvia

Abstract

The use of Open Educational Resources (OERs) in higher education is becoming increasingly urgent. Therefore it is essential to find out students' views on the opportunities and challenges gained by applying OERs. In the current research there were 127 students involved from different faculties of the University of Latvia. In order to find out their views on the OERs an explorative qualitative research was carried out using online structured e-interviews. The obtained data were processed with qualitative data processing software AQUAD 6.0. The code system was created by the author of the article based on the latest insights on OERs. The model of generalisation was applied. For probing the generalisability of the findings the qualitative data were transformed into quantitative and hidden relations were revealed as Spearman rank correlation by the use of SPSS 11.0. Constructed linkages were checked.

The results show that the majority of students do not have a clear understanding of Open Educational Resources, although they are essentially using OERs in the study process. They have different views depending on the level of study.

Thus an opportunity could be effective usage of different types of OERs as a challenge for students to develop their computer literacy, foreign language and information literacy skills to become more informal learners, bridging formal education with complementary resources and making learning more self-organised and self-directed, focused on active learning.

Keywords: Open Educational Resources (OERs), computer literacy, foreign language knowledge, information literacy, active learning

Introduction

The use of Open Educational Resources (OERs) in higher education is becoming more obvious as the issue of resource sharing opens up much wider possibilities of a structural and cultural nature. Collaborative, ubiquitous-/open learning and cloud learning environments as well as demands from the millennium learners entering higher education will profoundly impact the current university arena (Ossiannilsson & Creelman, 2011). These authors as well as Olcott (2012) emphasize the global nature of OERs: their importance to “the global knowledge-based

sustainable society will be the utmost,” and they are “the most powerful resources to transverse the global education landscape (along with the World Wide Web and the Internet) in the past century”. R. McGrea and others (2013) also point out that OERs are “important learning materials with the potential to facilitate the expansion of learning worldwide”. Undoubtedly, OERs like any modern technology play an important role “as a catalyst for bridging the digital divide, leveling the educational playing field between developing and developed countries” (Olcott, 2012), although their main function would be widening access to education in all educational levels. However, as the authors (Cannell, et. al., 2015) say “so far OERs are having limited impact on educational inequality”.

Although the importance of OERs is very widely discussed there is no common definition of the concept of OERs. The most popular definition has been developed by UNESCO and Commonwealth of Learning (2011):

Open Educational Resources are “the open provision of educational resources, enabled by information and communication technologies, for consultation, use and adaptation by a community of users for noncommercial purposes.” (UNESCO/IIEP, 2002)

Open Educational Resources are “teaching, learning and research materials in any medium that reside in the public domain and have been released under an open licence that permits access, use, repurposing, reuse and redistribution by others with no or limited restrictions”. (Atkins, Brown & Hammond, 2007)

As to higher education “OERs can include full courses/programmes, course materials, modules, student guides, teaching notes, textbooks, research articles, videos, assessment tools and instruments, interactive materials such as simulations and role plays, databases, software, apps (including mobile apps) and any other educationally useful materials. But “the term ‘OERs’ is not synonymous with online learning, eLearning or mobile learning. Many OERs – while shareable in a digital format – are also printable” (UNESCO and Commonwealth of Learning, 2011)

As noted by R. Moe (2015), from the perspective of OERs the definition of openness has also been developed. It is important for the OERs movement to continue to shape the definition of openness and not to lose its broad nuance to a limited definition within a postmodern vision of the future of education.

While there are several different definitions of what exactly OERs are, as K. Jensen (2013) stresses, their common feature is that they are educational resources, from individual lesson plans to entire course modules, which are openly available and can be used by students for free. She also points out that OERs users are actively encouraged to reuse, revise, remix and redistribute the resources, although in reality there are often barriers to accomplishing this goal. In the present research this specific aspect is not discussed because the study is mainly directed towards raising awareness of OERs.

OERs essence clarification is in close connection with the real revolution in higher education, introduced with the appearance of Massive Open Online Courses

(MOOCs). M. Weller (2014:89) says that “no subject in educational technology in recent years has generated as much excitement amongst educational entrepreneurs and angst amongst established academics as MOOCs”. Open Educational Resources can be divided in many ways. In the above mentioned research OERs indicate course units or modules, lesson plans, lectures, games, quizzes, videos, open courseware, open textbooks, database, academic publications and MOOCs. Certainly, there is a distinction between “big” OERs and “little” OERs, especially MOOCs as “big” OERs, which are usually of high quality, contain explicit teaching aims, presented in a uniform style and form part of a time-limited, focused project with portal and associated research and data (Open Education Handbook, 2014).

The potential benefits of OERs have led many European governments to implement policies supporting their creation and use. Higher education is currently the most advanced sector in the deployment of OERs as shown by the boom of Massive Open Online Courses (MOOCs). However, Europe (with some exceptions, such as the UK) is not embracing OERs with as much enthusiasm as other regions of the world, like the USA or Brazil (Sabatie et. al., 2014).

As pointed out by J. Sabatie and other co-authors some of the “bottlenecks” to mainstreaming the use of OERs in education are:

- *Content aspect*: Foster adequate, easy to find and high quality resources;
- *Discoverability*: It is not easy for users to find quality resources that are appropriate to their teaching and learning needs;
- *Lack of quality assurance mechanisms*;
- *Language*: nearly half the OERs supplied their resources in English;
- *Lack of adoption of open standards*;
- *Legal aspect*: Clarify the legal framework;
- *Societal aspect*: Foster learners' and teachers' skills for using OERs;
- The use of OERs is also hindered by the *lack of skills*. Five main issues arise: 1) uneven availability of ICT infrastructure; 2) different levels of digital skills, 3) teachers' digital pedagogic skills, 4) development of innovative teaching practices and innovation-friendly teaching environments, 5) insufficient individual learning-to-learn skills;
- *Economic aspect*: Foster sustainability and increase returns on public investment on OERs.

Some of the above mentioned aspects are examined in the present research.

What is a situation in Latvia? R. Birzina (2015) analysed the main Latvian policy documents such as Basic Guidelines for Development of Education 2014–2020, Sustainable Development Strategy of Latvia until 2030, The National Development Plan 2014–2020, and Information Society Development Guidelines 2014–2020. Paradoxically, but “the terms “*Open Educational Resources*” and “*Massive Open Online Courses*” practically are not used in any of the official government documents. However, this terminology in different interpretations appears in the public space (newspapers, magazines, websites and social networks).

- Concerning the use of digital technologies there are mentioned such terms as “*digital training tools and resources – electronic edition*”, “*digital teaching aids*”, “*digital learning content*” as a supportive environment for education. In order to widen participation in adult education the following terms are noted as a tool: “*distance education*” and “*massive open online courses*” (there is no explanation of the meaning of that term). For an individual's personal development it is identified as a need to acquire “*ICT skills*” (Basic Guidelines for Development of Education 2014–2020, 2014).
- The role of ICT in chapter “Change of Paradigm in Education” has been highlighted in terms of “interactive and qualitative study content in virtual environment”, “face to face learning”, “distance learning”, “digitalisation”, and “free available”. As concerns chapter “Innovative and Eco-efficient Economy” then for Priority Long-term Action Directions as Practice of Open Innovations it is noted the use of open-source programmes, easily accessible lecture materials, digital networks for the transfer of knowledge and digital platforms, and digital licensing of intellectual property (Sustainable Development Strategy of Latvia until 2030, 2010).
- Regarding the most important medium-term priorities, areas of action, objectives and the indicators of their implementation concerning ICT it is mentioned that *information technologies are the pillars of the education system* and an objective to reach. It is development of such competences as *command of information and communications technologies, communication and cooperation skills and e-skills to use a digital learning environment and digital learning materials* (The National Development Plan 2014–2020, 2012).
- As concerns ICT in education the terms “*e-skills*”, “*information literacy*” and “*digital learning resources and environment*” are mentioned (Information Society Development Guidelines 2014–2020, 2013).

Based on the above findings on the OERs the research was conducted involving students of various faculties of the University of Latvia (UL).

Methods

The present research has also been done as a contribution to future collaborative studies in ASEM LLL Research Network No. 1 concerns the topic “Pedagogical approach to lifelong learning through OERs” (Birzina and Gudakovska, 2013; Nasongkhla et. al., 2014). It was conducted during 2013 to find out the situation with OERs in Latvia.

The aim of the study and research questions

The aim of the present research is to study students’ understanding of the concept of OERs in the context of an opportunity and a challenge for them.

The research question: How do students see an opportunity and a challenge to use OERs in their studies?

Research Sample

The research sample comprised 127 students of the University of Latvia. The students represented seven faculties (T – teacher professional study programmes (Faculty of Chemistry and Faculty of Pedagogy, Psychology and Art), H – humanitarian study programmes (level: bachelor and master), G – geography study programmes (level: bachelor, master and doctor), P – pedagogy and education study programmes (level: bachelor, master and doctor), L – lawyer study programmes (level: bachelor and master), B – biology study programmes (level: bachelor and master), and E – economy study programmes (level: bachelor and master).

They were divided into three age-related demographic quarters according to recommendations of T. Schuller and D. Watson (2009) with the exception of the first group (17–24), which was divided into two sub-groups by levels of education: bachelor's (17–21) and master's degree (22–24) programs. Other students were ranked as the third group (25–50). The data of the research sample are shown in Fig. 1.

AGE	17-21 (50)			22-24 (38)			25-50 (39)	
GENDER	Female (103)					Male (24)		
LEVEL	Bachelor (58)		Professional (26)		Master (38)		Doctor (6)	
FACULTY	T (35)	H (24)	G (18)	P (17)	L (16)	B (12)	E (5)	

Fig. 1. The characteristics of the research sample

Research Design

The qualitative exploratory research design was used. The data have been obtained by the online structured e-interview. The coding system, performed on the framework of conception of OERs, was created for processing data. Qualitative data processing program AQUAD 6.0 was used. Taking into account the relatively small data base of qualitative studies the model of generalization was optioned (Huber and Gurtel, 2013). For probing the generalizability of the findings the qualitative data were transformed into quantitative and hidden relations were revealed, as well pre-constructed linkages were checked (Mayring, 2001). It means that a combination of qualitative and quantitative analyses on the second level of data analysis, when coding categories can serve as data, was implemented. Counting codes provide a general access to these combinations.

The Design of the Questionnaire

In order to find out students' views on the use of OERs in the context of opportunities and challenges gained for their studies an e-interview was developed. It consisted

of two parts: general and conceptual. The general part of the e-interview consisted of 6 items related to the description of position of the students. The conceptual part of the questionnaire concerned the understanding of OERs (Table 1).

Table 1

Types of Question Categories in the Questionnaire

General information	Comprehension of OERs
Gender Age Faculty of UL Study year Study programme Work experience	Perceptions of OERs Types of OERs used Skills for the use of OERs Advantages of the use of OERs

The item categories of Table 1 were used to explore the students' views concerning OERs and they were used as qualitative data to explain the students' opinion about Open Educational Resources as an important factor to facilitate learning. There was developed a code system to be used in the elaborated questionnaire (see Fig. 2).

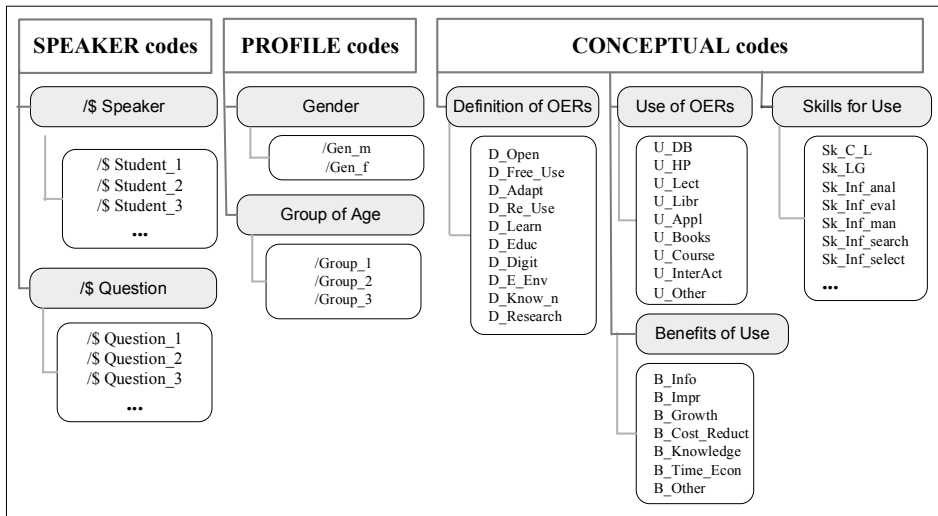


Fig. 1. The code system used in the research

Results

In order to evaluate students' understanding on OERs, the skills needed, the best practices in the use of OERs, as well as the interrelation of the personal growth and information literacy, language literacy and computer literacy in the context of opportunities and challenges offered by the use of OERs, were analysed.

Opportunity 1. An opportunity is to form the students' understanding of OERs and their use – it will be a challenge to develop an independent learner who can have a free-of-charge access to a wide range of educational resources worldwide to support study skills.

From 127 surveyed students only 38 use OERs in their studies, 82 students do not use, but the others – seven students, are not sure that the materials used are OERs.

As it is shown in Table 2, there is a considerable uncertainty in understanding of OERs – the majority of the students in all the age groups do not know what OERs are and do not use them. The findings of the students' understanding of OERs revealed that they give priorities to interpretation of OERs as “educational”, “free use”, and “open”.

Table 2

Students' understanding on what OERs are

Answers	Age Group		
	17–21	22–24	25–50
Materials for open learning	36.23	45.00	65.68
Materials for free use	13.04	18.75	36.55
Internet or digital materials	10.15	6.25	38.22
Materials used for research	8.70	6.25	9.14
OERs as learning environment	2.90	1.25	3.03
Materials with an intellectual property license	1.45	1.25	6.11
Materials for re-use and adaptation	0.00	1.50	4.62
Materials for teaching	0.00	1.25	4.62
Consider that do not know	27.54	17.50	32.03
<i>TOTAL (%)</i>	<i>100.00</i>	<i>100.00</i>	<i>100.00</i>

The main types of OERs used by the students are:

- e-books, databases, documents and e-resources from library of University of Latvia (UL) in age group 17–21;
- publications and articles in Open Access journals and databases, e-studies of UL, free massive open online courses (MOOCs) developed by Coursera.org and EdX.org in age group 22–24;
- free access textbooks, tests and software tailored to specific training needs of learning, video resources available through YouTube or Khan academy, as well educational materials in the following educational environments such as Coursera, EdX, Udacity, MIT, Open Course Ware in the age group 25–50.

As it is seen in Table 3, there is a significant correlation among students' study level ($r_s=0.355$, $p<0.05$), work experience ($r_s=0.503$, $p<0.05$) and use of OERs ($r_s=0.189$, $p<0.01$). It means that if the student is more experienced, then he/she is more open to the use of OERs both in the learning process and the workplace.

Table 3

Spearman rank correlation

Indicators	Study level	Working while studying	Use of OERs
Age group	.355**	.503**	.108
Study level	1.000	.145	.058
Working while studying	.145	1.000	.189*
Use of OERs	.058	.189*	1.000

* $p<0.05$; ** $p<0.01$ Asymp. Sig. (2-sided)

Opportunity 2. An opportunity is that if the benefits offered by OERs are used effectively, then a challenge for students will be developing computer literacy, foreign language and information literacy skills needed for working with OERs.

The key skills that are most necessary for the use of OERs (Table 4) for students in all the mentioned age groups are “Computer literacy”, “Foreign language skills” and “Information literacy”. As concerns the information literacy, it involves the skills for option, searching, evaluating and analysing information.

Table 4

Students' views of Information Literacy Skills

Answers \ Age Group	17-21	22-24	25-50
Computer literacy	46.67	22.86	56.76
Foreign language skills	26.67	8.57	40.81
Information literacy	13.33	48.57	83.77
Other skills	13.33	17.14	7.62
Work management	0.00	2.86	7.62
Communication skills	0.00	0.00	3.45
TOTAL (%)	100.00	100.00	100.00

The students of the age group 17-21 considered that they need more skills of computer literacy (46.67%) and foreign language (26.67%), but less skills of information literacy (13.33%) and some other skills such as intelligence skills. They underestimate the skills needed for work management and communication. The students of the age group 22-24 attach the highest importance to information literacy skills (48.75%) and computer literacy skills (22.86%), as well as indicate the necessity for work management. They have no problems with

communication skills. The experienced students (age group 25–50) believe that the most needed skills are information literacy (83.77%), computer literacy (56.76%), and foreign language (40.81%). This group also acknowledges the need for work management and communication.

Are the information literacy skills related to computer literacy or foreign language? The determined linkages show a relationship between information literacy skills (the code “*Sk_Inf_L*”), and computer literacy skills (the code “*Sk_C_L*”) or foreign language skills (the code “*Sk_LG*”). The largest number of confirmations (10) are in the age group 25–50, and then with six confirmations follows the age group 17–21. Some citations of the students' answers are given below:

Student 5. ..language skills (the code “*Sk_LG*”) means to be able to “play” with the words, ..information search (the code “*Sk_Inf_search*”) and information option skills, ..the ability to critically evaluate the content and veracity of the material (for example, Wikipedia).

Student 105. Knowledge of the English language (the code “*Sk_LG*”), the Russian language (the code “*Sk_LG*”), as well as to have certain skills to work with my computer “*Sk_C_L*”).

Opportunity 3. An opportunity is student’s personal development and growth through the usage of different types of OERs that is a challenge for students to become more informal learners, bridging formal education with complementary resources and making learning more self-organised and self-directed, focused on active learning.

Students consider online resources as an inherent part of their studying experience. As it is shown in Table 5, more important for all the age groups are the possibilities to improve their studies with obtaining new information and acquisition of knowledge by using a variety of resources. It is important for personal development and growth, especially for students in the age group 22–24 (23.53%). As concerns the students of the age group 25–50, they much more appreciate the usage of OERs for saving time (15.79%), but for the others (students of the age group 22–24) the possibility of cost reduction (14.71%) is significant.

Table 5

Students’ views of advantages of OERs

Answers	Age Group		
	17–21	22–24	25–50
Improvement of studies	37.50	29.41	21.05
Obtaining information	18.75	20.59	26.32
Knowledge acquisition	18.75	8.82	31.58
Personal growth	12.50	23.53	5.26
Saving time	6.25	2.94	15.79
Cost reduction	6.25	14.71	0.00
<i>TOTAL (%)</i>	<i>100.00</i>	<i>100.00</i>	<i>100.00</i>

Is there a relationship between students' personal growth, knowledge and information obtained? The constructed linkages show a relationship between student's personal growth (the code "B_Growth"), and knowledge (the code "B_Knowledge") or obtaining information (the code "B_Info"). The significant confirmations (6) are in the age group 22–24, and there is only one insignificant confirmation – in the age group 17–21. There are some citations of the students' answers given below:

Student 45. It is a new perspective (the code "B_Growth") on how to learn/teach with an opportunity to get knowledge free of charge (the code "B_Knowledge"), though studying Latvian, unfortunately, is not available. It is a life-long learning and the opportunity to learn (the code "B_Growth") exactly that information (the code "B_Info") which seems interesting and useful for ourselves in a convenient time and place.

Student 60 It is faster to find information (the code "B_Info"), compared to the traditional way – to go to the library and look through books.

Discussion

Discussion related to OERs: the educational opportunities. As noted by E. Ossiannilsson and A. Creelman (2011, 2012) there is no single paradigm associated with OERs. "OERs is just one aspect of major paradigm shift in education. The educational paradigm in the use of OERs emphasizes education for all, inclusion, democracy, internationalisation, virtual mobility and sustainable development among other issues." As concerns learning, the concepts "behaviourist", "constructivist", "connectivism", "collaborative learning", "digital literacy", "open access" and "lifelong learning" are most commonly used (McGrea et. al., 2013). The implementation of OERs in academic curriculum can be compared to opening Pandora's Box (Ossiannilsson & Creelman, 2012).

The OERs Research Hub (de los Arcos, et. al., 2014) set out eleven hypotheses which represented many of the key beliefs propounded regarding OERs:

- *Performance*: Use of OERs leads to improvement in student performance and satisfaction;
- *Openness*: The Open Aspect of OERs creates different usage and adoption patterns than other online resources;
- *Access*: Open Education models lead to more equitable access to education, serving a broader base of learners than traditional education;
- *Retention*: Use of OERs is an effective method for improving retention for at-risk students;
- *Reflection*: Use of OERs leads to critical reflection by educators, with evidence of improvement in their practice;
- *Finance*: OERs adoption at an institutional level leads to financial benefits for students and/or institutions;
- *Indicators*: Informal learners use a variety of indicators when selecting OERs;

- *Support*: Informal learners adopt a variety of techniques to compensate for the lack of formal support, which can be supported in open courses;
- *Transition*: Open education acts as a bridge to formal education, and is complementary, not competitive, with it;
- *Policy*: Participation in OERs pilots and programs leads to policy change at an institutional level;
- *Assessment*: Informal means of assessment are motivators to learning with OERs.

The current research shows that most of the mentioned hypotheses are topical for students and this evidence can be considered as an opportunity and a challenge for students. They are performance, openness, access, finance, indicators and transition.

- **Performance** – if the student uses OERs, she/he gains additional knowledge in the study course, which is not available at the UL. The students are satisfied with such a possibility. Undoubtedly, it is important to note that participants gained new insights and knowledge (Kleiman, et. al., 2013). G. Siemens and S. Downes developed a theory for the digital age – connectivism, denouncing boundaries of behaviorism, cognitivism, and constructivism (Duke, et. al., 2013). Students evaluated their performance mostly within constructivist approach as the formation of new knowledge. None of the students mentioned interaction between participants of Massive Open Online Courses. As highlighted by G. Siemens and S. Downes (2009) for successful learning, it will be a necessity of active participation in connectivist learning. They noted such activities as: a) aggregation of information, b) remixing and reflecting on the resources and relating them to what people already know, c) repurposing: creating something of their own, and d) sharing their work and activities with others. However, there is a common problem of “diminishing learner participation in MOOCs over course durations. The authors assess MOOCs as challenging environments, which can discourage or disorientate many learners, as witnessed by the low percentages completing. However, the literature also shows that mere completion is not a relevant metric, that learners participate in many valid ways, and that those who do complete MOOCs have high levels of satisfaction. There is as yet no agreed satisfactory system of measurement for assessing the quality of MOOCs from the learners’ point of view” (Media Legislation Reports, 2013).
- **Openness** – has a great potential for offering different kinds of OERs. There are e-books, databases, publications and articles in Open Access journals, videos, demos, and interactive learning materials, including automated training, also tests, questionnaires and exercises and tasks, and MOOCs. Whereas the issue, which OERs are, was provocative, the students' answers may have been imperfect, since most of them had no idea that what they used are OERs. In particular, it refers to Bachelor students, and it is also understandable, because as it is shown by Latvian policy document analysis, practically there have not been used the terms “OERs” and “MOOCs” (Birzina, 2015). There is a possibility that Master’s and Doctoral students have already been

informed of the activities of the University in open education and development of Open Minded Courses, as well as most of them have already been experienced the availability of the University library services (Atvērtā izglītība – Latvijas Universitāte).

- Access – students positively evaluate an opportunity to learn without interruption, any place and at any time. As it is stressed in many of the researches (de Waard, et. al., 2015, Hylén, 2006, Weller, 2014), time management and planning was a recurring and frequently mentioned factor of the benefits of the use of OERs. In any case, it is an invaluable challenge: “freedom – for individuals to access content, to reuse it in ways they see fit, to develop new methods of working and to take advantage of the opportunities the digital, networked world offers” (Weller, 2014:15).
- Finance – benefits for students: it is a possibility to take part in various free of charge MOOCs. Students should evaluate the phenomenon of OER and MOOCs that “individuals and institutions give away learning resources for free – which at first seems counter intuitive and difficult to explain within the old economic and educational context, might be better understood as a part of a new culture and an emerging economic reality” (Hylén, 2006). As indicated by M. Weller (2014), there are commercial interests that are now using openness as a marketing tool (Ibid., 5). If it concerns the financial impact, there may well be an educational one, simply because the costs of textbooks prevent many students from purchasing them (Ibid., 77). But in any way free MOOCs can't replace the higher education system because much of the cost of education has little to do with the educating element (Ibid., 122).
- Indicators – students understand the importance of information literacy for the right choice of resources. Students indicate that not only information literacy is essential; just as important is the knowledge of foreign languages and management of computer skills. As noted in Media Legislation reports (2013) the literacies and skills required to benefit from MOOCs are very specific, for example, “many learners find a MOOCs a confusing experience, which demands high levels of online, personal, network and relationship skills in addition to subject knowledge”. L. Medeiros (2013) summarizing her experience of working with students indicates, that MOOCs can help students develop foreign language skills and critical thinking, communication and problem solving skills. The mentioned critical thinking and problem solving skills are closely linked with information literacy skills. In the 21st century, information literacy is a key attribute for everyone, irrespective of age or experience. Developing as an information literate person is a continuing, holistic process. Literacy is evidenced through understanding the ways in which information and data is created and handled, learning skills in its management and use and modifying learning attitudes, habits and behaviours to appreciate the role of information literacy in learning (SCONUL, 2011).

- Transition – it is an opportunity of learners for development of independent and self-determined learning. It is evidenced by such examples of good practice as – students use a good video lecture on the subject when preparing for the exams, or students based on the material available on the Internet have written their bachelor's paper as well as a number of required essays. There are many students who have completed quite a number of massive open online courses and are at present involved in some other courses of such a kind. As emphasized by G. M. Kleiman and other authors (2013), it is “self-directed learning through which participants personalize their own goals, select among a rich array of resources, and decide whether, when, and how to engage in projects and discussions to further their own professional learning”.

In general, all the above can be considered as new challenges, which “create interest, which is not passive. A wish to find a solution is typical to it. New challenges form experience that teaches one to experiment in new conditions by interacting with new challenges. In order to enhance their competences students have to overcome higher and higher challenges all the time. Autonomy in planning and performing an activity widens the efficiency of their activity as the student is capable of perceiving the situation as a problematic (challenging) issue which might be solved because the student is aware of his/her competences” (Birzina, et. al., 2011).

Conclusions

The following conclusions in understanding of OERs in the context of an opportunity and a challenge for students were drawn.

As an opportunity it is to form students' understanding of OERs and their use – it will be a challenge to develop an independent learner who can free-of-charge access a wide range of educational resources worldwide to support the study skills. There is a considerable uncertainty in understanding of OERs: the majority of students in all the age groups do not know what OERs are and consider that they do not use them. But the present research reveals that students understand that OERs are “educational”, “of free use”, and “open”. There is a relationship – if the students are more experienced then they are more open to the use of OERs both in the learning process and in their workplace. In the usage of OERs there are differences between different age groups of students: 1) bachelor students are more oriented to use e-books, databases, and e-resources from the library of UL; 2) master students focused on research and self-development, and 3) professional and doctoral students are more directed to professional development, as well as improving their work-related needs.

As an opportunity may serve effective use of the benefits offered by OERs; it will be a challenge for students to develop their computer literacy, foreign language and information literacy skills needed for working with OERs. The research data

show that students from all the age groups believe that for effective usage of OERs they require the following skills: computer literacy, foreign language, and information literacy skills. Bachelor students required more computer literacy and foreign language skills, less – information literacy; they are not worried about work management and communication. The students of the age group 22–24 attach the highest importance to information literacy and computer literacy skills, as well as indicate the necessity for work management. They have no problems with communication skills. The experienced students as the most needed skills consider information literacy, computer literacy, and foreign languages. This group evaluates also the need for work management and communication.

As an opportunity there is student's personal development and growth through the usage of different types of OERs; a challenge for students is to become more informal learners, bridging formal education with complementary resources and making learning more self-organised and self-directed focused on active learning. The students believe that the use of online resources is an inherent part of their studying experience. More important for all the age groups are the possibilities to improve their studies with obtaining new information and acquisition of knowledge by using a variety of resources. It is significant for personal development and growth, especially for students of the age group 22–24. The students in the age group 25–50 evaluate more the usage of OERs for saving time; but for the students of the age group 22–24 cost reduction is important. There is a relationship – if the student uses various types of OERs, she/he is more self-organised and self-directed in learning.

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TOURISM, RESEARCH AND EDUCATION

Agita Doniņa, MBA
Tamāra Grizāne, Dr.oec., Assist.Prof.
Turība University, Latvia

Abstract

World tourism growth forecasts show an increase in demand for professionals with high level of competence in traditional academic disciplines and what is equally necessary – 21st century knowledge and skills. The study aims to explore topical improvements in Latvia's tourism education and current background processes in the European Education Area. Methodology used: 1) analysis of scientific literature – tourism and other social sciences literature. This includes studies of literature related to scientific and other aspects of tourism education, which allows understanding the different approaches to tourism research and tourism as an industry; 2) previously conducted research analysis – studies available in databases. Review of major studies related to tourism education and research issues. The study deals with the points of contact of implementation of the education policy; tourism industry research and the tourism labour market; higher education in tourism. The main conclusion – the accession of the higher education system of Latvia to the Bologna Declaration principles gradually promotes the twining of academic and professional education, thus raising attention to the employment, competitiveness, and the opinion of the employers regarding postgraduates of second level higher education.

Keywords: Tourism education, tourism industry, tourism research

Introduction and background

The modern day tourism industry requires an educated employee who is open to various cultures, knows a variety of languages and thinks “outside the box” i.e. is capable of seeing the interdisciplinary nature as formulated by the three time Pulitzer Prize winner Tomas Freidman in his book *The World is Flat* (Friedman, 2006, 119).

The modern day tourism employee must have highly developed communication skills as emotional intelligence is as important as intellectual intelligence and only a combination of both can guarantee success in the modern labour market while working within an international team. Moreover, in today's information saturated era it is necessary to quickly process the information received and distinguish the most essential information that should be applied to work. All

these knowledge and skills necessary for the 21st century define the necessity for modernising the education system.

The world is constantly changing and the society and tourism have to adapt and be prepared to work in these changing conditions. Students entering the tourism industry should have a variety of skills, abilities and knowledge which means that the tourism education system must change radically to satisfy these needs (Wallis, Steptoe, 2006). Moreover, tourism education programmes do not just need to be improved but also need to be essentially redesigned to improve the existing skills, knowledge and abilities. Tourism employment is undergoing constant changes and today's topical work profile will no longer meet the needs in the near future. Consequently there is an increasing necessity to sustainably manage and integrate tourism values in education.

Synthesising the complexity of issues related to dependence of introduction of education policies on the local implementers, points of contact between the policy makers and the tourism industry as well as issues related to tourism research as such from the point of view of these participants the authors have identified the reflection and actualisation of the industry to be insufficient.

Research environment – Latvian tourism higher education.

Research object – The link between tourism research, industry and education.

The goal of the research is the improvement of tourism higher education that is topical for Latvia and to study its background.

Tasks set for achieving the goal: get acquainted with the field of tourism research and its disciplinary context; understand the development of tourism education and actualities; summarise the most important information regarding Latvian tourism education; to draw conclusions based on the theoretical concepts summarised and results gained.

The methodological base for research is the study of tourism education and the industry, works of international and Latvian scholars and their notions on tourism education, research and their links to the tourism industry. The present research is based on statistical data on European and Latvian tourism industry and education for the period 2005–2015.

The link between tourism research, industry and education

At present there is no common understanding of tourism as an industry and no clear definition of the tourism industry even when the tourism phenomenon has had an ever increasing impact on the human environment and lifestyle in the 20th and 21st century (Lew et. al., 2005; Munar, 2007).

The tourism industry is closely related to spheres such as infrastructure, transport, hospitality, entertainment and other services. The tourism industry permeates all sectors of the economy and is able to influence them both directly and indirectly. The term *tourism industry* is widely used to talk about a relatively separate unit that functions wherever tourism is present. However, some researchers such as N. Leiper believe that until scholars think that there is no strong theoretical base for the existence of a single tourism industry, various scales of *tourism industry* which could overlap with each other exist. One could support any of these opinions; however it cannot be denied that the term has a practical significance as it influences research and the education industry connected to enterprises and planning institutions (Leiper, 2008).

The authors have identified the discrepancy but do not address these nuances in terminology in this paper hereinafter adhering to the widely accepted concept of *tourism industry* among academicians and practitioners in the field of tourism.

Tourism is a multifaceted sphere that attracts the undivided attention of economists, environmentalists, sociologists, psychologists, politicians and management researchers and can give countless contributions to various scientific fields as stated by K. Meethan in 2001 (Meethan, 2001). According to C. Hall it is a field of anthropology, sociology, politics, urban and regional planning, geography, ecology, economics, psychology, jurisprudence, management, finance, architecture and design, transport, as well as hospitality and the catering sector (Hall, 2005).

The authors consider that – tourism research cannot be related to just one concrete sphere and agree with A. Holden that each of the abovementioned fields deepens the understanding of tourism (Holden, 2006). Therefore tourism cannot be considered within one discipline and that led to two approaches to tourism studies – multidisciplinary and interdisciplinary. The former refers to a mixture of elements of various disciplines with their distinct methodologies and assumptions but the latter is a set of certain disciplines whose methodologies and assumptions have been merged together into one that is directly appropriate for tourism (Hall, 2005).

However, there is a counter argument of tourism as a set of disciplines: R. Johnstone considers that such does not exist as there are no strict borders among them (Johnstone, 1991). According to T. Cole's opinion tourism should be seen as a post-disciplinary field and should be based on the synthesis and synergy of knowledge (Coles et. al., 2006). Without doubt according to the authors' opinion such a post-disciplinary view enables us to create knowledge without disciplinary limitations.

This helps in tourism research but regardless of the amount of significant scientific literature, periodical journals, books, conference proceedings and publications there is a lack of study of tourism at the analytical level. It could be said that **tourism grows faster than developments in tourism research**. In addition there is a sort of tension between the tourism industry and tourism policy makers due to the lack of research (Lew et. al., 2005).

It is, in particular, important for tourism education development. Incomplete and wrong labour demands may create far reaching consequences for the Latvian national economy.

The second tourism industry problem according to Leiper and the authors is the difficult and complex relationship between academicians and industry practitioners and their inability to evaluate their different roles. **There exists a prevalent wrong opinion that research only belongs to science;** industry practitioners, however, cannot ignore it as only business research can solve business problems (Leiper et. al., 2007).

Tourism research problems and tourism industry practitioner's understanding or the lack thereof is exposed in the cooperation between **tourism industry and tourism education**. The EU supports a wide range of activities with the aim of modernising the content of higher education and its practical applicability. The Bologna process is aimed at the introduction of systematic changes and the creation of a strong and unified tourism education taking into account the fact that **the effectiveness of implementation of education policy depends on the local implementers**.

Tourism higher education

Tourism education is relatively new and its origins can be traced to the 60's of the 20th century. However, it has proven itself globally as a significant and growing field that plays an essential role in the education offer of numerous countries.

Tourism education consists of composite elements of the tourism system such as studies and training as well as other forms of interaction among humans that is aimed at preserving, developing and promoting knowledge and transferring it to the society. Tourism education stakeholders are students, researchers and administrative personnel, education planning institutions and organisations that deal with tourism research data gathering and analysis. The common aim of the stakeholders is to preserve, enhance, deepen tourism knowledge and make it accessible to the public. (Munar, 2007).

The *Association for Tourism and Leisure Education* (ATLAS) was established in 1991 to support tourism education worldwide. The association aims to develop international initiatives in the field of tourism and leisure education. ATLAS supports and provides mobility for students and tourism education institution employees, international research, furthers the design of learning programmes and professional development (ATLAS, 2009).

With time it became clear that serious consideration must be given to the process of implementation of tourism education. Rapid changes in the labour market due to globalisation created the necessity for students to gain new sets of knowledge and skills in order to develop a successful professional career.

Tourism Education Futures Initiative (TEFI) was formed as an acknowledgement of the necessity for such changes. TEFI was founded by P. Sheldon and D. Fesenmaier in 2006 and they together with 45 teaching staff of the University of Vienna and industry representatives planned the future of tourism education for the period 2010–2030. TEFI's goal is to provide a future vision, knowledge and carry out improvements in tourism education programmes as required by changes to ensure higher preparedness of the alumni and closer cooperation with the tourism industry. TEFI today endeavours to resolve complex issues starting from the provision of high quality education and its conformity to future needs of the tourism industry and ending with the identification of fundamental values (management, ethics, knowledge, cooperation, professionalism) in tourism education programmes (Sheldon, Fesenmaier, Tribe, 2011; Sheldon et. al., 2011; Dredgea et. al., 2011).

The five fundamental values: management, ethics, knowledge, cooperation, professionalism have recently been the focus of attention of many researchers including U. Gretzel, A. Isacson, D. Matarrita, E. Wainio, proving the importance of tourism education based on these values (Gretzel et. al., 2011).

TEFI at the University of Lugano, Switzerland gained convincing empirical results in determining the fundamental values of conceptual framework for tourism programs, universities and tourism cooperation by evaluating 85 tourism study programmes worldwide as well as the content of 156 international tourism related work vacancies posted on job search engines (Padureana & Maggia, 2011).

It should be mentioned here that tourism education is also based on other organisations such as the Bologna process, *which is described in the next section*, participant members such as the European Commission, as well as organisations that belong to the consultative support groups such as the Council of Europe, UNESCO European Centre for Higher Education), European University Association, European Association of Institutions in Higher Education, European Higher Education Quality Assurance Association in collaboration with the European Student Associations, Education International Pan-European Structure and the Employers' Confederation (Businesseurope, 2015).

Researching the development of tourism education the authors have found out that world tourism education has undergone a complex path of transformations in its development. The stakeholders in this process: students, researchers and administrative personnel, education planning institutions and organisations, that deal with tourism research data gathering and analysis are united under a common aim – to provide, develop, enhance, and deepen tourism knowledge that would be useful for the tourism industry. However, tourism education cannot be viewed separate from higher education as it is a part of it and everything that happens to higher education affects it directly. Therefore the authors have first focused their research on the process of formation and development of the European education system.

European higher education area and tourism

The process of creation of a European higher education area or the so called Bologna process was started in 1999 with the signing of the Bologna Declaration aimed at harmonizing European higher education making it comparable, competitive and attractive for students and academic staff of Europe and other continents. The aim thereof was to create a common European higher education area by 2010 based on the necessity to develop an education system whose quality would match the best education systems worldwide, in particular in the USA and Asia. (Leuven-Louvain-la-Neuve, 2009).

The common higher education area formed as the final result of the Bologna process would facilitate mobility of students and higher education academic staff, educate and train students for their future career and life as an active citizen of democratic societies as well as offer wider access to qualitative higher education based on democratic principles and academic freedom (Leuven-Louvain-la-Neuve, 2009).

The Bologna process is not static and is changing continuously. Every second year and at present (in 2015) education ministers of 47 Bologna process member states evaluate the progress and set out the priority activities for the next period. (Budapest–Vienna Declaration, 2010).

It is worth underlining that the process involves not only education institutions, ministries, students and academic staff but also various stakeholder groups and their associations, employers, international organisations and institutions.

Bologna process is closely linked to EU policy and projects. In the EU context the Bologna process is a part of a broader effort to form a common knowledge based Europe. These efforts include:

- Enhancement of lifelong learning and adult education;
- Lisbon strategy for growth, jobs and social integration;
- Initiatives within the framework of the European Research Area;
- Copenhagen process on enhanced cooperation in vocational education and training.

(Leuven-Louvain-la-Neuve, 2010).

The EU supports a broad range of activities aimed at modernising higher education content and its practical applicability. The EU works on the modernisation of programmes of higher education institutions and European Research area using the implementation of EU Framework 7 for research and Competitiveness and Innovation Programme as well as Structural Funds and loans from the European Investment Bank (Eurydice, 2009).

The European Commission analyses the situation in individual countries and prepares a comparative report to get an overview of the higher education area thereby supporting the achievement of the goals of the Bologna process. A *Euro barometer* survey conducted even back in 2009 showed strong support among higher education institution students for the modernisation of higher education

programmes which also matches with the results of forecast survey conducted among higher education academic staff in 2007 (The Gallup Organization, 2009).

During that same year A. Munar in her doctoral dissertation wrote about the necessity for tourism education modernisation and structural reforms and reviewed the Bologna process from the globalisation theory perspective and analysed its impact on tourism education. Research results revealed the impact of the Bologna process on the European Higher Education Area (EHEA), as the Bologna structural instruments standardise the process and this could help resolve the problem of fragmentation of tourism education. Munar puts forward the argument that the Bologna process is a unique opportunity to introduce systematic changes and create strong and unified tourism education at the same time without forgetting that whether or not the implementation of education policies proves to be effective depends on the local implementers. (Munar, 2007)

Over the last decade European higher education has experienced reforms at the European, national as well as institutional levels. The number of countries that have undertaken to implement such reforms has also increased. There are two development prospects that work together within the Bologna structure – global and local which merge together and create a new reality. (Reichert, Tauch, 2005; Munar, 2007)

The new reality faced a lot of tourism education problems: programmes and the degrees awarded, differences in qualification, the diverse attitude of those gathering employment statistics, differences between various tourism education programmes that were more or less oriented towards entrepreneurship, diverse nature of the tourism industry and its sectors that were either considered or not considered to be mutually interconnected (Munar, 2007).

One of the primary aims of the Bologna process was to promote the merging of the education and administration systems in all the partner countries involved. The terminology was standardised by introducing a European credit transfer system (ECTS), Diploma supplements (DS), European Qualification Framework (EQF) and other instruments, e.g. *Europass* certificate initiative (Cedefop, 2015).

A European Association for Quality Assurance in Higher Education (ENQA) was formed within the process to promote quality assurance and was ratified by all the respective ministers of the signatory states. This quality assurance system had 4 main elements: European peer review system; European external quality assurance agency register; European standards and guidelines for higher education institutions and the European consultative forum for quality assurance in higher education. The introduction of the abovementioned elements will change the perception of quality of tourism education, expanding the interaction regarding education-related processes across national and regional borders (Munar, 2007; ENQA, 2009).

Latvia in the European Higher Education Area

Similar to the majority of Eastern European countries, Latvian higher education reforms started with political changes and therefore the Bologna process cannot be considered as the beginnings of higher education reforms in Latvia but rather as its continuation. For example the structure of bachelor and master studies in Latvian academic higher education was introduced several years before the Europe came to a joint decision to move on to a two level higher education structure, and higher professional education was already regulated by the *Law on professional education* (Profesionālās izglītības likums, 1999).

With the signing of the Bologna declaration in 1999 reforms in Latvia continued along joint European lines which can be seen from the various conceptual guidelines which were worked out with aim of developing Latvian higher education in accordance with the Bologna declaration principles. Accordingly amendments were made in the law, higher academic education standards and the development of professional education standards (AIP, 2000; Amendments in the law on higher education institutions, 2000; Regulations on state standards for second level professional higher education, 2001; Regulations on state standards for academic education, 2002).

The national conception for the development of higher education and higher education institutions for the period until 2010 worked out in accordance with the AIP (Higher Education Council) envisaged the promotion of, as indicated by the authors of this research, the convergence of academic and professional education ensuring the applicability of academic education degrees in the labour market and providing graduates of professional higher education programmes the opportunity to carry on education in academic programmes and be involved in research activities. As the conception in Latvia envisioned a move towards a two level higher education system, two types of bachelor and master degrees were approved- one academic and the other professional. At the same time professional higher education programmes retained the college level i.e. first level higher education programmes that conferred a qualification that could be used in the labour market and also provided the opportunity to continue higher studies in professional bachelor programmes (AIP, 2000).

The authors point out the attention paid by the conception to issues regarding employment of these graduates – the award of academic master's or bachelor degree was simultaneously oriented towards a specific profession and conformed to the respective profession standards ensuring the acquisition of basic skills related to the relevant study programme such as communication, ability to work independently or in a group, manage the work of other people, analyse one's performance, ability to learn independently and gain the skills necessary for that definite period thereby furthering the chances of graduates to find their place in the labour market (AIP, 2000).

The authors indicate that the amendments made in Latvian higher education to the section 57 of the Law on higher education institutions as of 12th December 2000 were insufficient, as second level professional higher education programmes still existed at that time upon completion of which graduates were awarded a higher professional education qualification diploma without the award of any master's or bachelor degrees. Consequently at that time both new professional higher education bachelor and master's programmes as well as second level professional higher education programmes without the award of degrees existed simultaneously in the Latvian higher education system (Grozījumi augstskolu likumā, 2000).

In order to decrease the gap between higher academic and higher professional education and provide employability, changes were made to the Higher education and second level higher professional education standards.

The section 4 of the academic higher education standard stipulated that “academic education is the prerequisite for research activity in the respective professional field”, but the section 12 stated that “the main objective of bachelor study programme is provide students the scientific background for professional activity developing their scientific analytical ability and skills in independently resolving problems.” The authors point out that amendments in the higher education standards while defining the preparedness of graduates of academic master's programmes for the labour market foresaw their training only for research activity and graduates of professional master's programmes were educated and trained for professional activity in the labour market. Therefore the master's degree in Latvia was understood as a purely academic degree but after the amendments in the standards in 2000 the problem was finally resolved and was more in conformity with the European higher education area, i.e., employability of graduates of all levels of higher education (Haug & Tauhs, 2001; Regulations on state standards for second level professional higher education, 2001; Regulations on state standards for academic education, 2002).

Employment issues were worked out in the “Regulations on accreditation of higher education institutions and study programmes” issued by the Cabinet of Ministers as of 3rd October 2006 and envisaged that profession standards shall be applied to each and every professional higher education programme undergoing accreditation or if such did not exist then the recommendations of professional associations or employers shall be applied (Procedure for accreditation of higher education institution, college and higher education programmes, 2006).

Further cooperation was expressed while working out the new profession standards: the drafting procedure was laid out that envisaged a triparty cooperation sub council involving professional education and employers by inviting experts from the relevant industry ministries and professional organisations (Profession standards drafting procedure, 2007).

The new 2012 procedure for accreditation of higher education programmes focused not only on scientific publications of academic personnel over the past five years published in peer reviewed publications but also on the views of employers

regarding these academic personnel (Procedure for accreditation of higher education institution, college and higher education programmes, 2012).

The new regulations on state academic education standards adopted in 2014 emphasises that bachelor degree provides the opportunity to continue studies in both professional master's study programmes as well as second level professional higher education programmes and therefore studies are much closer to the labour market. Moreover the main aim of master's study programmes is "to ensure that the knowledge, skills and competences on the whole conform to knowledge, skills and competences set out for the 7th level of the Latvian education qualification framework" (Regulations on state academic education standards, 2014).

The abovementioned documents are not the only ones that influence the development of the Latvian higher education. A significant role was also played by the National Development Plan of Latvia for 2014–2020 (NAP 2020), wherein the chapter "A Vision of Latvia in 2020: "Economic Breakthrough – for the Greater Well – Being of Latvia!" sets out a vision: future Latvian higher education graduates as competitive in the local as well as the international labour market and a growing number of graduates of higher education institutions who would continue their career in science. Moreover it aims to achieve an investment to the tune of 1.5% of the GDP in innovation and research by 2020, cooperation between higher education, science and the private sector, as well as the transfer of research and innovation into business (National Development Plan of Latvia for 2014–2020, 2012).

In order to understand the tourism education system in Latvia and its relation to the Latvian higher education development in accordance with the Bologna declaration principles the authors have gathered information regarding Latvian tourism education and studied the role of tourism research and its connection with the tourism industry.

Latvian tourism education in the European Higher Education Area

Higher education in the field of tourism could be acquired in Latvia in 2014/2015 at 11 out of a total of 36 higher education institutions in Latvia – Turība University (BAT), Vidzeme University of Applied Sciences (ViA), Social Integration State Agency (SIVA), Latvian University of Agriculture (LLU), Liepāja University (LiepU), Information Systems Management Institute (ISMA), Rezekne Higher Education Institution (RA), as well as Alberta College (AK), Business Management College (BVK), Baltic International Academy (BSA) and European distance learning University (ETA) (Fig. 1). In comparison 9 out of 34 higher education institutions offered such programmes in 2009 (AIKNIC, 2009; LR IZM, 2014). The growth in the number of higher education institutions and study programmes offered reflects the increasing demand for tourism education.

On the whole these institutions offer 17 accredited programmes that cover a wide range of tourism professions under the study disciplines of *Hotel and Restaurant Service* and *Tourism and Recreation Organisation* and only one RA programme *Hospitality and Management* programme is implemented under the study discipline *Management, administration and administration of real property*. Two programmes ViA – *International Tourism Events Management* and RA – *Hospitality and management* programme are offered as joint programmes with Lithuanian Klaipeda and Utenos universities. 4 programmes are offered under the code 41811 (Hospitality service), 1 – code 41812 (Cultural tourism management), 1 – code 42811 (Catering and Hotel Business), 7 – code 42812 (Tourism and hospitality management) and 4 – code 47812 (Strategic management of communication in the entertainment and recreation industry) (LR IZM, 2014).

Table 1

**Accredited tourism higher education programmes as of
2015.02.15. (LR IZM, 2013)**

Higher education institution	Programme name
BAT	Hospitality Service
	Tourism and Hospitality Management
	Event and Leisure Management
	Tourism Strategic Management
ViA	Toourism Organisation and Management
	Tourism Guide – Tour and Events Organiser
	Tourism Strategic Management
	International Tourism Events Management
SIVA	Hospitality Service Management
LLU	Catering and Hospitality Business
LiepU	Tourism Management and Recreation
ISMA	Restaurant Business
AK	Cultural Tourism Organisation
BVK	Tourism and Hospitality Service
RA	Hospitality Management
BSA	Tourism and Hospitality Management
	Strategic Management of Communication in the Entertainment and Recreation Industry
ETA	Tourism Management

The programme names (Table 1) differ and their contents also differ as shown by the desire of the higher education institutions to modernise the higher education content in conformity with the EU aims. The tourism education programme offer of these higher education institutions from the geographic standpoint is as follows: Riga – 10 programmes, Valmiera – 4 programmes, and 1 programme each

in Jelgava, Cesis, Jurmala, Liepaja, Jekabpils and Talsi. Some higher education institutions, e.g. ViA and BAT offer also masters study programmes in the tourism sector (LR IZM, 2014).

The authors believe that there are too many programmes in the tourism higher education system which shows that there is a lack of coordination and unnecessary fragmentation in tourism higher education.

It was stated in the Latvian tourism development guidelines project for 2009–2015 that a disparity can be observed in the distribution of specialists among the bigger cities (especially Riga) and the other Latvian territories where there is a lack of qualified labour force in the tourism and hospitality sector. This has also been affected by the economic downturn and after accession into the EU more favourable circumstances for free mobility of the workforce among the EU member states were created which was eagerly used by specialists with a qualification in the hospitality sector (LR EM, 2009).

The accreditation data stated above indicate the geographic proximity of education and training of tourism industry workforce and their potential employment as well as the corresponding intensity of demand to the bigger cities.

It is possible to acquire tourism higher education in Latvia at two education levels – 1st level higher professional education at vocational schools/colleges and 2nd level higher professional and bachelor's degree (Fig. 1) from Latvian universities, academies and higher education institutions, as well as study for master's degree in masters study programmes. Unfortunately it is not possible to get a doctoral degree in tourism science from Latvian education institutions as yet.



Fig. 1. Implementation of first and second level education in 2010/11
(Source: Authors and EHEA Working Group on Recognition, 2011)

Education area category indicators (Fig. 1.) in accordance with the Bologna principles indicate the implementation of first and second level education in countries in percentage (%). A quarter of them indicate that around 70–89% students study in programmes which correspond to the two level study system. Latvia is also represented in this category as in the majority of countries 90% of the students study in two level systems.

The bachelor and master level tourism education in Latvia highlights the acquisition of business and management knowledge and therefore graduates of these programmes can work both in the industry as well as manage enterprises. However in some education institutions the specialisation is directly and solely connected to the tourism industry which on the one hand offers in depth knowledge but on the other hand limits the future job prospects of the graduates in the labour market.

With the adoption of the Bologna declaration significant improvements were carried out in the creation of a common European higher education area. However, Latvian higher education institutions foresee 4 years of studies which is in conflict with the aims of the Bologna declaration of a three year bachelor and points out to only a 75% conformity to the declaration. The situation is different with regards to the tourism master's programmes which conform to the Bologna declaration requirements of 2 years as they vary from a duration of 1.5–2 years in Latvia depending on the previous level of education acquired (LR IZM, 2014).

The huge variety of degrees and qualifications awarded for tourism studies in the authors' opinion is also confusing and therefore there is a necessity to create a unified system that would be much more understandable for students, researchers and employers.



Fig. 2. Implementation of the National Qualifications Frameworks, 2012
(EHEA Working Group on Recognition, 2011)

All tourism programmes that are in the common European higher Education Area have to undergo certification and accreditation. According to the Bologna Qualifications Framework for the EHEA the self accreditation procedure was carried out with the involvement of foreign experts (Eurydice, 2012). The implementation of the National Qualifications Frameworks (NQF) is illustrated in the Fig.2.

The category indicators for the education area (Fig. 2) in accordance with the Bologna principles indicate the implementation of the national qualification frameworks in 10 steps:

Step 10: Compatibility of national qualifications frameworks with the Qualifications Framework for European Higher Education Area.

Steps 7–9:

- 9. Qualification is included in the NQF;
- 8. Study programme is designed based on learning outcomes that are included in the NQF;
- 7. The implementation of the NQF is started with an agreement among the higher education institutions, quality assurance agencies and other structures regarding the duties and obligations.

Steps 5–6:

- 6. NQF is adopted in the legal enactments or in other higher level political forums;
- 5. Discussion at the national level, the NQF design is worked out and agreement among all stakeholders is achieved;

Step 4: an agreement is reached on the level structure and the description of the levels (learning outcomes) and the credit points.

Steps 3–1:

- 3. NQF development process is charted out, the stakeholders are identified and the various commissions are formed;
- 2. Agreement is reached regarding the aims of the – NQF
- 1. The decision on commencement of development of NQF has been approved by the state institution that is responsible for higher education (EHEA 2012: Bologna Process Implementation Report, 2012).

Out of 49 countries (Fig. 2), 13 countries including Latvia have indicated that according to the Education Area category indicators and in conformity with the Bologna principles that they are in steps 7–9 of the implementation of the national qualification frameworks i.e. the qualifications have been included in the NQF, study programmes have been designed based on the learning outcomes and the implementation has been started with the agreement of the higher education institution on its duties and obligations.

The European Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) were drafted and approved in Bergen (Norway) in 2005. The standards and guidelines were applied in relation to all higher

education institutions and quality assurance agencies in Europe regardless of its structure, functions and size, or state systems wherein they exist. ESG does not include detailed “procedures” and it acknowledges the autonomy of the national education systems i.e. the higher education institution itself determines definite requirements for various study subjects and is responsible for quality assurance in the higher education institution (ENQA 2009).

9 higher education institution programmes (table 1.) have been accredited in Latvia as of 15.02.2015 for a period of 6 years and the BSA and ETA programmes for 2 years. It should be added that accreditation documents have already been submitted for one of the three programmes for which accreditation is supposed to expire in summer 2015. Taking into consideration the fact that the final term for the majority of tourism higher education institutions is summer 2019 it could be considered that the tourism education programmes conform to the Bologna process principles. Therefore it could be stated that success or failures in the introduction of education policies depend on the local implementers.

Bologna process has provided the basis for joint efforts to reform and modernise the higher education system. As the European Commissioner for Education, Culture, Multilingualism and Youth, Androulla Vassiliou, said: “Now it is necessary that students provide real benefits for the economy and society as a whole. We have to strive to provide the labour market with higher quality educational offer” (Eurydice, 2012, 224:3).

Finding similarities in the situation the Latvian Minister for Education and Science Mārīte Seile stated: “The Latvian education system plays a stable role but is that enough for us?”

While developing international cooperation in higher education the emphasis in the tasks for the coming years should be placed on the alignment of education with economic needs (Kuzmina, 2015).

The same can be said about the education reforms being implemented which tend to adapt the education to the needs of the national economy and that means also the demand for employees at present and future forecasts based on present trends.

Labour market, tourism and research

Labour market forecasts is one of the tools that enables us to foresee the incompatibilities of the labour markets in advance and enables us to provide a more effective distribution of labour resources for the national economy. They indicate the possible labour market development trends and possible risks taking into account the changes expected in the education offer structure. At the same time it should be mentioned that forecasts are only one of the stages in the process of adaptation of the labour force offer.

Several research works have been conducted in Latvia to ascertain the labour force demand and out of them 13 main labour market surveys have been carried out by the Ministry for Welfare (Augstāko un profesionālo mācību iestāžu absolventu profesionālā darbība pēc mācību beigšanas, 2007; Darba tirgus pieprasījuma ilgtermiņa prognozēšanas sistēmas izpēte un pilnveidošanas iespēju analīze, 2007; Detalizēts darbaspēka un darba tirgus pētījums tautsaimniecības sektoros, 2007).

Forecasting of changes in the labour market in the future at national level is at present primarily handled by two institutions – Ministry of Economics (EM), which works out medium and long term forecasts of the labour market and the State Employment Service (NVA) that works out short term forecasts.

The assessments and labour market forecasts carried out by the Ministry of Economics are used for education planning. It is based on existing employment surveys and education results survey and based on them forecasts are made in accordance with the national priorities laid out in the strategic documents.

Moreover it should be mentioned that there are more than 20 different councils, committees and working groups in Latvia who deal with resolving labour market and education issues. However due to the lack of mutual coordination often their decisions are not compatible and are often in conflict and in addition there is a lack of understanding and conflict of interests among the various stakeholders (LR EM, 2014).

The Free Trade Union Confederation of Latvia (LBAS), a NGO, in 2011 commissioned a survey “Study on employee conformity to labour market needs after education in the country” which indicated sharp changes in the structure of the Latvian national economy and the Latvian GDP structure: In 2012 services accounted for 74.1% of the total added value (Karnīte, 2011).

The State Education Development Agency in 2012 along with four other partners – Employers’ Confederation of Latvia (LDDK), Free Trade Union Confederation of Latvia (LBAS), National Centre for Education (VISC) and State Education Quality Service (IKVD) carried out a research “Sectoral study on vocational education” within the framework of which it was ascertained in accordance with CSB data for 2010 that a total of 34422 enterprises operated in the tourism sector: accommodation – 721, travel agencies, tour operators and reservation services were provided by 592 enterprises but the majority of enterprises or 2 129 enterprises operated in the catering services sector. Accommodation and catering services provided employment for 26.1 thousand employees in 2010 and the figures rose by 3.2 thousand in 2014 (Nozaru izpētes pētījums profesionālajai izglītībai, 2012).

Evaluating the actual demand for employees (vacancies) in accordance with CSB statistical data the authors cite examples of vacancies in various spheres connected to tourism (Fig. 3). Comparing the CSB data on the number of vacancies in accommodation and catering and the number of those employed in 2014 it can be seen that the figure is small and stable: 29.3 thousand employees with 41 job vacancies. Such is the obvious provision of labour force in the sector.

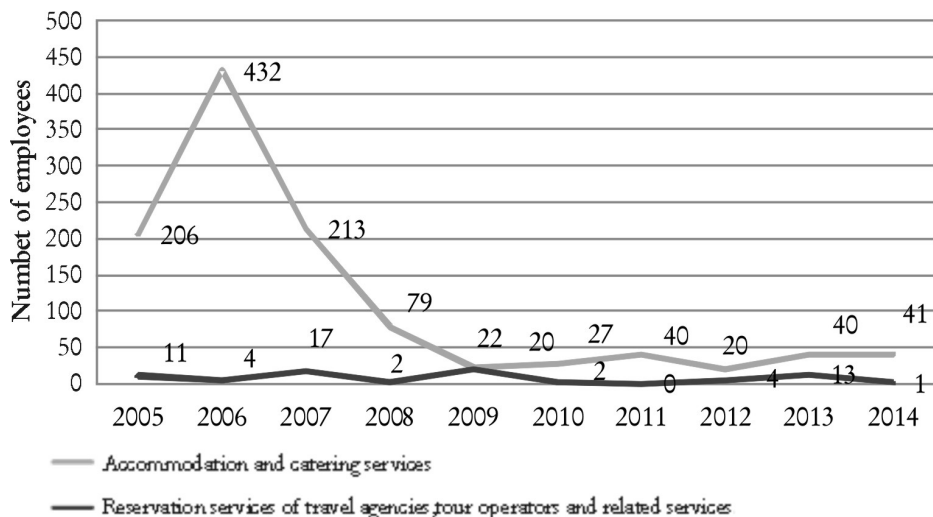


Fig. 3. Employee demand for vacancies, annual average (CSP, 2015a)

The tourism sector is an active labour market as jobs in this sector are highly in demand and this partly explains the low number of vacancies.

Professional mobility analysis attributed the greatest inflow of employees to travel and transport services from other profession groups during the period 2002–2010. Moreover the majority of them had come from the senior business specialists group which can be explained by the fact that travel and transport services employees require specific knowledge and skills (language skills, good communication and computer skills) (Detalizēts darbaspēka un darba tirgus pētījums tautsaimniecības sektoros, 2007).

From the viewpoint of the potential labour force for the tourism industry – the number of students who were awarded a degree and qualification on average according to CSB data for the study year period from 2004/2005 till 2013/2014 was 22 104 per year (CSB, 2015b). The authors ascertained from the IZM register that on average 2626 students studied in all tourism study programmes on a yearly basis (with the exception of those who acquired the tourism specialisation under other study programmes) in Latvian higher education institutions for the period 2009–2014 (LR IZM, 2014).

Comparing the CSB employee demand data for the accommodation and catering sector (fig. 3) with the number of tourism specialists trained and educated it can be seen that there is excess supply. Of course it should be taken into account that the vacancy data of CSB is not comprehensive and only reflects the employee demand partly. However, it should be mentioned that there are forecasts of insufficient employees especially in the tourism industry, a sphere that is constantly developing. Artūrs Kaņepājs, an expert from the Bank of Latvia based on the experience of other countries indicated that although “There is still a

potential for growth of Latvian tourism, it cannot in the long-term overtake the overall national economic growth” (Baltic Export, 2011).

The Latvian education system has to change corresponding to the national interests and it is important to provide sufficient amount of highly qualified specialists for the national economy, so that employers do not express any dissatisfaction with the education system results. It is the employers’ assessments which are in fact the best and most precise indicators.

According to the employers’ assessments in 2014 Turība University, which has one of the leading tourism and hospitality faculties in Latvia got the 3rd ranking. Moreover Turība University is the first among Baltic and Scandinavian countries to have received the UNWTO – United Nations World Tourism Organization accreditation and the UNWTO TedQual certificate (prakse.lv, 2014).

LDDK and Prakse.lv representatives recommend that the youth to listen to the opinions of employers while choosing their field of further studies and the higher education institution in order to ensure that they have a successful career in the planned field of their studies (LDDK, 2014).

Higher education institutions that are capable of listening as well as reacting to the needs of the tourism industry, employers, potential students and graduates shall achieve success with the best honours and be able to provide the practical knowledge and competences that are in demand in the labour market.

Researching the improvements that are topical in Latvian tourism higher education and environment the authors have contributed by creating a theoretical analytical basis of tourism studies that could be useful for future research.

Conclusions

Drawing conclusions the authors wish to underline the improvements that are topical for Latvian tourism education and the following results of their background research:

- 1) Tourism cannot be considered as one science discipline but as an overlapping or mix of various disciplines or as a set of disciplines i.e. through a multidisciplinary or interdisciplinary approach to tourism studies.
- 2) The global tourism education development process is a complex transformational process that involves students, researchers, administrative personnel, and education planning organisations and institutions that are related to tourism education and aimed at serving the tourism industry.
- 3) The European Higher Education Area development process – Bologna process is dynamic and oriented towards reforms at the European, national and institutional levels to standardise the attributes of higher education qualification, programmes, terminology, helping to resolve the problem of fragmentation

of tourism education and providing ECTS, DS, EQF, Europass and other instruments.

- 4) The accession of Latvian higher education to the Bologna declaration principles steadily promotes the harmonisation of academic and professional education paying attention to research activity as well as to employability of graduates of all levels of higher education placing greater emphasis on the provision of competitiveness of students which is also appreciated by the employers.
- 5) Higher education in the field of tourism can be acquired in Latvia in 2014/2015 from 11 institutions primarily in Riga where there is the largest demand for workforce in the tourism industry. Tourism profession can be acquired in 17 accredited programmes. In accordance with the Bologna principles 70–89% of students study in programmes that correspond to two level study system and the study programme qualifications are included in the NQF. As of 15.02.2015 Latvia has 9 institutions with accredited higher education programmes. Success or failure in the implementation of education policy depends on the local implementers.
- 6) Forecasts regarding the labour market at the national level are primarily done by two institutions in Latvia – LR EM that works on medium and long term forecasts of the labour market and the NGOs: LABS, LDDK, VISC and IKVD. 2626 students study tourism in Latvian higher education institutions. The number of employees in the tourism industry in 2014 increased by 3.2 thousand but the CSB data does not reflect the real demand. Tourism research lags behind the development temp of the tourism industry. The implementation of tourism education policy in accordance with the Bologna principles and cooperation among universities and employers, prospective students and alumni is a real support to the economy and society as a whole.

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FEATURES OF SOCIAL CAPITAL IN RUSSIA

Galina Karpova, Dr.habil, Prof.

Saint-Petersburg State University of Economics, *Russia*

Natalia Spiridonova, PhD, Assoc.Prof.

Saint-Petersburg State University, *Russia*

Abstract

Social capital is an important factor of social development and the integration of society in the modern conditions. Investment in social capital is a prerequisite for the proper functioning of economy and determines the quality and rates of socio-economic progress. Social capital has been studied in its relation to the institutional system and society with its social infrastructure. Attention is drawn to the geographical characteristics of the country, the level of ethno-linguistic fractionalization of society, as well as cultural and historical factors, which are important preconditions for the establishment and functioning of a market institutional environment. Russia is very different from the European countries in geography, population distribution and heterogeneity of infrastructure, including the institutional one. The purpose of this article is to analyze the relationship of social cohesion, institutions and economic growth using econometric modeling techniques. As a result of the analysis it has been found out that by using econometric modeling a significant relationship between institutional macroenvironment, its quality and factors such as ethnolinguistic fractionalization and geography, can determine the level of institutional macro. The impact of the institutional environment on economic growth allows us to consider social capital as a factor of production and a resource, as part of the national wealth.

Keywords: social capital, institutional environment, ethnolinguistic fractionalization of society

Introduction

Social capital is an important factor of social development, and the integration of society under modern conditions continues to be one of the focal points of research. The present article shows that considering the social capital from a macroeconomic point of view, the macroeconomic effects of the use of social capital can be expressed as a change in macroeconomic indicators such as GDP, ND, employment, economic growth, and others. In this article social capital has been studied in its relation to the institutional system and society with its social infrastructure. Social capital is a system of institutions and institutional environment where the economy and society operate. Our hypothesis is that the geographical characteristics, the level of ethnolinguistic fragmentation of society, as well as

cultural and historical factors are the conditions for the creation and functioning of the market institutional environment. They can either promote or retard the development of market institutions.

This study uses a combination of methods of modern economic theory and statistics. The main methods of the research done are the methods of econometric modeling. It allows to analyze the impact of social capital on the economic growth. The results obtained undergo quantitative analysis (analysis of indices, analysis of distribution of variables) and qualitative analysis (text analysis, item identification based on frequency of occurrence). It was necessary to integrate quantitative and qualitative analysis to be able to draw valid, meaningful conclusions.

An overview of the relevant literature regarding social capital served as the basis for this article. The difficulty is that there does not exist a general understanding of the definition of social capital. Basically social capital explains the consequences of relationships of the activities of the involved parties. It means that the social capital theory provides an explanation regarding the relationships between members in organizations and society as a whole. Thus social capital is important for the economy. Social capital supports the processes and functionality in society; it also creates conditions for the functioning of the human capital.

One of the first definitions of social capital describes it as a resource to be used for the social development of children, for their accumulation of human capital. Later, in the mid-80s the attention of economists was paid to the importance of social capital for the effective operation of the economic system. Social capital has been regarded as the organizational capital of the company (Asheim & Weitzman, 2001), as it embodies the value of the organizational structure of the economy. F. Fukuyama (Fukuyama, 1995) and other economists (for example, Hall & Jones, 1996; 1999) have considered social capital as a multilevel phenomenon, unlike its human capital. Greater emphasis was placed on the term "social". The definition of social capital as a number of characteristics of social life, as a social interaction to achieve common goals was very extensive among researchers (Coleman, 1988; 1994). Later, quantitative research in both social and cultural capital was carried out (Tzanakis, 2011); and social capital is seen as a cause and a consequence of social inequality (Tzanakis, 2013). Definition of social capital as a phenomenon that occurs and accumulates in the family, dominated in the works of Russian economists (Сухарев, 2008). That is why, in our view, social capital is seen mainly as an addition or condition of existence and human capital accumulation. As a consequence there is a lack of methodology for assessing social capital. Finally, according to the World Bank methodological recommendations (on the measurement of national wealth), social capital is all the intangible wealth of society, except for human capital (World Bank, 2006). Thus, social capital is a necessary precondition for the proper functioning of economy. This definition has changed the "status" of social capital by moving it from the level of capital that households use and accumulate at the macroeconomic level, to the capital, which is essential for the economy as a whole.

Social capital as an institutional framework for the functioning of society and the economy

If society comprises social groups related to each other by different relations, institutions describe and provide the relationship between social groups and individuals. Social group is a community of people united by their relation to productive resources and their role in the allocation of resources.

The market dictates the type of social system, it generates social groups according to their relation to resources and defines the relationships between the groups in the form of “game rules” on the market. Thus, social capital is a measure of adaptation of the society to market conditions and therefore it is a mandatory and significant economic factor. In other words, social capital is a system of institutions and institutional environment where the economy and society operate. The institutional environment is the basis of social capital linking the various social groups in a single society through a system of relations between them.

It is difficult to identify the individual costs in the overall costs in the process of formation of the institutional system. This is the cost of the whole society. The whole society uses the results of functioning institutions. Institutional system as the institutional environment is a social phenomenon. But this is not enough to treat it as a capital.

The system of institutions is the environment in which the distribution of resources (factors of production) is carried out efficiently in terms of the market that provides the best return of production factors (see Fig. 1). The institutional environment is the result of the market. Effective institutional environment provides a long-term sustainable economic growth, investment and GDP growth, resistance to external shocks.

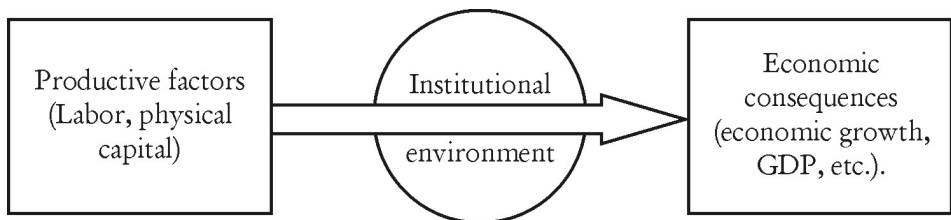


Fig.1. The place of the institutional environment in the economic processes

The authors of the article would like to underline that it is impossible to give a definition of social capital as it is the capital without specifying its immanent characteristic – the economic effect of this type of capital. Thus, the macroeconomic effects of the use of social capital can be expressed as a change in macroeconomic indicators such as GDP, GNI, employment, economic growth, and others.

It is a proven fact that institutions affect economic growth; therefore institutions, as well as physical and human capital, can be regarded as a productive factor. Costs and economic returns are inherent to this factor as well as all the others. Thus, there is every reason to consider the institutional system as a type of intangible capital.

From this standpoint the institutional system is a social capital. To measure the quality of the institutional environment, we can 1) identify the list of institutions that provide law enforcement and 2) to identify the main indicators of the level of protection of law enforcement. These institutions typically include the following: judicial independence, government effectiveness, depth of financial markets and others.

The research of institutional quality shows that the macro institutional environment is one of the fundamental factors of economic growth, and one of the geographical characteristics of countries and the level of ethnolinguistic fragmentation of society. In our view, geographical characteristics, the level of ethnolinguistic fragmentation of society and cultural and historical factors are the conditions for the creation and functioning of a market institutional environment. They can either promote or retard the development of market institutions and should therefore be included in the concept of social capital as well. The interaction of all these factors is presented in Fig. 2.

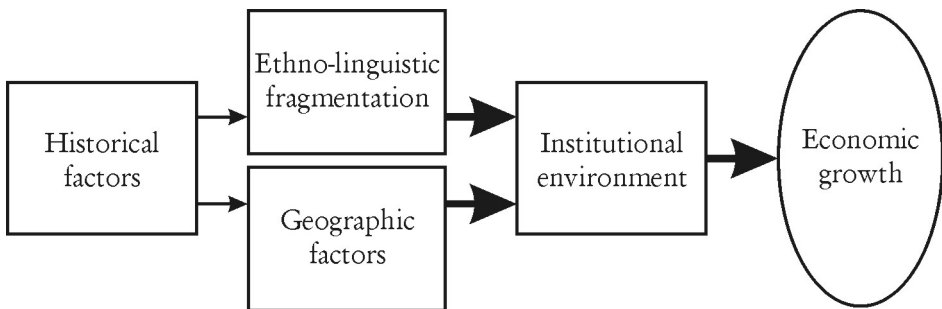


Fig. 2. Interaction of factors and economic growth

Geographical factors of social capital

The impact of geographical factors on economic growth is mediated by institutions. Geographical location being successful for the growth may turn useless because of the low quality of the institutional environment. The population compactness living in a small area makes it easier to create and maintain transport infrastructure, reduces transport costs and simplifies doing business. Whereas a large area where the population lives on almost unconnected “islands of civilization” requires a strong center, as well as creates difficulties in the management system, provides conditions for corruption and so forth.

The developed countries are mostly located in the northern hemisphere, with a temperate climate and access to waterways. This geographical location “has a direct impact on growth by reducing transport costs, improve public health, productivity of agricultural crops, the availability of natural resources and lower costs of extraction of natural resources, as well as an indirect effect – due to the age-old development of the territory, population density, which together contribute to the growth due to the agglomeration effect” (Easterly, Ritzan, 2006). This situation is typical of the modern world, but we know the historical periods when the most developed countries were located in other geographical areas.

The impact of geographical factors on economic growth is mediated by institutions, i.e, the benefits of a successful geographic location for economic growth may not be realized due to the low quality of the institutional environment. The study of the features of the institutional environment in Russia and the impact of the environment on economic growth is quite intensive, but the study of the impact of geographical features of our country on its economic development is not enough.

The geographical factors of social capital form the ethnolinguistic diversity of the society in Russia, a geographically and ethnically complex country. The authors of the article offer the following list of indicators showing various aspects of geographical factors (Table 1).

Table 1.

Geographical factors of social capital

Designation	Indicator
θ_1	development intensity of transport infrastructure
θ_2	the distance between the centers of ethnic formations
θ_3	the level of regional identity of the population (indigenous / migrant)
θ_4	the ratio of the length of the border with the market and non-market countries
θ_5	ethnic formations distance from the political / economic center of the country
θ_6	remoteness of the regional centers of political / economic center of the country
purpose of measurement	estimate possibility of a unified market space in the area under consideration

As an open economy has the ability to simulate the institutional environment of the country's neighbor, partner in trade relations, then the length of the border with the market economy countries affects the formation of institutions in the country. This simulation is realized by adopting legal acts to develop foreign trade relations with its neighbors. Proposed by the authors, the term “ethnic formation” means village (or group of settlements in any population) having

ethnolinguistic locality that distinguishes the local population from the population of the neighboring settlements.

Although the ethnolinguistic fragmentation is presented as a factor in the social environment in economic models, only one index – Index of coincidence – is measured. New indicator of ethnolinguistic fragmentation proposed in Table 2, can extend the evaluation tools for the ethnolinguistic fragmentation of society.

Table 2.

Indicators of ethnolinguistic fragmentation

Designation	Indicator
ε_1	religious differences within ethnic formation
ε_2	admissibility of market relations for the predominant religion in the territory
ε_3	share of the population, related to the predominant religion in the territory
ε_4	ethnic homogeneity
ε_5	migration rates in ethnic education
ε_6	level of readiness for migration of ethnic education
ε_7	coefficient of linguistic and religious unity of ethnic formation
general indicator	the degree of involvement of ethnic formation in globalization

In the present research the authors are mainly interested in the level of ethnolinguistic fragmentation of society as a feature of society's willingness to participate in the process of economic globalization. Ethnic, religious differences can be a significant barrier to the creation of unified “game rules” in the economy. These differences may not have consequences for the countries in which the market institutional environment has been created, but can significantly hinder the establishment and functioning of market institutions in the countries that have just started to implement market-based institutional reforms.

Cultural and historical characteristics of the social capital of the nation

National mentality is a system of traditions and moral values, shaped by historical events that occurred in the area. Historical events form the national character, which, in turn, determines the speed of propagation and rooting degree of market institutions in the ethnic formations and the national economy. The authors of the article offer a measure of cultural and historical features of the social capital of the nation with the following extended list of indicators presented in Table 3.

Table 3.

Indicators of cultural and historical factors of social capital
(Карпова Г., 2010)

Designations	Indicator
Ψ_1	acceptable level of gender inequality
Ψ_2	the trend in the permissible level of gender inequality
Ψ_3	levels of social inequality that community sees as a valid
Ψ_4	the trend in acceptable level of social inequality (the direction and rate of change)
Ψ_5	share of legislative and other acts aimed at reducing social inequalities
Ψ_6	the existence of national historical experience in the areas of: - Private enterprise, - Market legislation, - Individual freedom, - Market expansion, - Cultural assimilation, - Participation in international economic alliances and agreements
Ψ_7	direction of market expansion (outside, inside), change the direction of economic expansion throughout the history of ethno formation
Ψ_8	way to create market institutions that try out this ethno formation historically (natural / artificial)
the purpose of measurement	level of predisposition of ethnic formation to create a single market space (the presence of historical experience in transformation)

We assume that the permissible level of inequality in terms of cultural and historical character is a level of inequality that society accepts as normal and is not contrary to moral values and views. The same applies to all types of social inequality, including gender. Changes in the level of social inequality that society considers acceptable, indicates the level of social cohesion and social activity in the community.

The influence of geographical and ethnolinguistic factors on the quality of the institutional environment

Let us now present the results of the econometric analysis carried out to test the hypothesis about the influence of geographical and ethnolinguistic factors on the quality of the institutional environment. The econometric models are constructed according to a sample of countries. The relationship between ethnolinguistic fragmentation and one of the most important political institutions – the 'rule of law' in society – is represented by the model (1).

The following data for several countries suggest the influence of ethnolinguistic fragmentation on the quality of institutions. Ethnic, linguistic and religious

fractionalization data were taken from Alberto Alesina, et. al. (2003); 'Rule of Law' data were taken from 'Rule of Law Index 2015'. Since we assume that the quality of institutions depends on several parameters (indexes) we can exclude countries with very large values of the other indexes, that are not in this chart: countries with $GINI > 0.53$, and 'Religious Fractionalization' > 0.8 were excluded.

Empirical data and analytical results are shown in the chart (see Fig. 3). The accuracy of approximation $R^2 \approx 0.63$. This shows a statistically significant relationship. In the present econometric model the quality of the institutional environment summarized by index of the 'Rule of Law', and ethnolinguistic fragmentation summarized by probability that two random individuals are not in the same ethnolinguistic group.

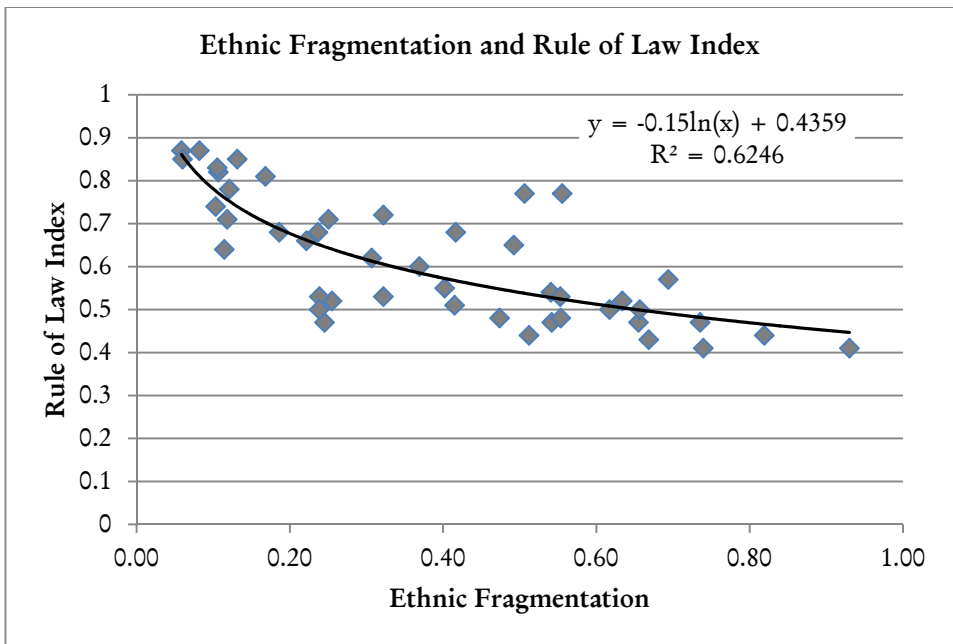


Fig. 3. Models of ethnolinguistic fragmentation impact on institutional characteristics of 'rule of law'

Consider the impact of social inequality on the institutional characteristics – the index of 'rule of law' (Fig. 4) (World Bank GINI index). Countries with the highest Ethnic, Linguistic and Religious Fractionalization index values were excluded. The accuracy of approximation is 0.48.

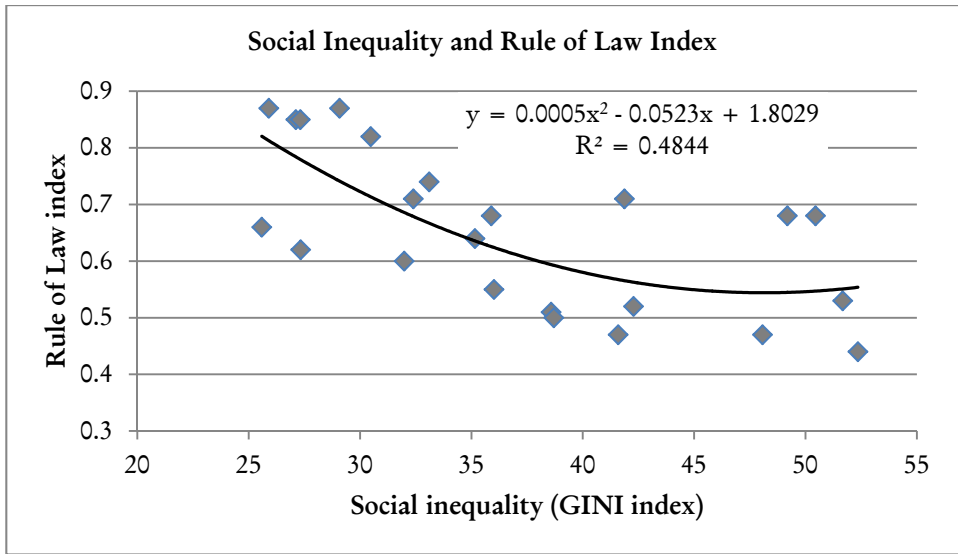


Fig. 4. Model of the impact of social inequality on the institutional characteristics – ‘the rule of law’

Both models show a noticeable impact of the fractionalization of society on the most important market institutions, even higher than the impact of social inequality.

Ethnolinguistic fragmentation has historical and geographical reasons. Ethno-linguistic fragmentation factor may have a significant adverse effect on the functioning of institutions, especially in Russia because of its large territory, linguistic and religious differences. High levels of corruption testify to this. It confirms our thesis that the institutional environment does not only mediate the influence of geography on economic growth, but it is the result of geographical features in a certain sense. Thus, the lack of development of market institutions in Russia has objective reasons, both historical and natural.

The noticeable influence of social fragmentation on the stability of institutions and the level of corruption suggests that cultural and religious norms and values are common. The lower the fragmentation of society, the fewer barriers to form a single highly effective institutional environment. “Countries with a strong sense of national identity are *ceteris paribus* more developed and stable national institutions and, therefore, better prospects for economic growth.” (Larson et. al., 2000) Thus, ethnolinguistic fragmentation is a factor of the quality of institutions. In addition, a high level of social cohesion contributes to the stability of the institutional system and has a positive effect on economic growth.

To measure the level of social cohesion, we can offer the following indicators: confidence in the government, the level of income inequality, discrimination, community values, depth of linguistic differences; differentiation in access to resources and services. Usually data sources are in institutional research surveys, scientific results, statistical surveys and others.

Conclusions

Social capital is a measure of the adaptation of society to market conditions and therefore it is a mandatory and significant economic factor. In other words, social capital is a system of institutions and institutional environment where the economy and society operate. The institutional environment is the basis of social capital linking the various social groups in a single society through a system of relations between them.

The research of institutional quality shows that the macro institutional environment is one of the fundamental factors of economic growth, as well as of the geographic characteristics of countries and the level of ethnolinguistic fragmentation of society. In our view, geographical characteristics, the level of ethnolinguistic fragmentation of society, as well as cultural and historical factors are the conditions for the creation and functioning of a market institutional environment. They can either promote or retard the development of market institutions and should therefore be included in the concept of social capital as well.

In the present study, the authors were interested in the level of ethnolinguistic fragmentation of society as a feature of society's willingness to participate in the process of economic globalization. Ethnic, religious differences can be a significant barrier to the creation of unified "game rules" in the economy. These differences may not have consequences for the countries in which the market institutional environment has been created, but can significantly hinder the establishment and functioning of market institutions in the countries that have just started to implement market-based institutional reforms. Corruption is one of the main negative effects of social capital.

In the present article the authors tested the hypothesis about the impact of geographical and ethnolinguistic factors on the quality of the institutional environment. The econometric models are constructed according to a sample of European countries. Ethnolinguistic fragmentation has historical and geographical reasons. Ethnolinguistic fragmentation factor may have a significant adverse effect on the functioning of institutions, especially in Russia because of its large territory, linguistic and religious differences. High levels of corruption testify to this. It confirms our thesis that the institutional environment does not only mediate the influence of geography on economic growth, but it is the result of geographical features in a certain sense. Thus, the lack of development of market institutions in Russia has objective reasons, both historical and natural. The main difficulty in the formation of the institutional environment, and an adequate market economy is overcoming these reasons.

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EXPLAINING AND MEASURING THE ACADEMIC ATTRACTIVENESS OF DIFFERENT COUNTRIES: EVIDENCE FROM THE VISEGRAD GROUP

Joanna Kosmaczewska, PhD

Mariusz Barczak, PhD

University of Economy in Bydgoszcz, Department of Tourism Economics,
Poland

Abstract

The main aim of this paper was to identify independent variables that explain the dependent variable of the inbound mobility rate in the four countries from the Visegrad Group. The statistical data of 5 years from 2008 to 2012 were analysed. In order to verify the hypotheses, Spearman's correlation coefficient and an analysis of variance test with post-hoc Tukey test were applied. The results indicate that there does not exist one precise set of variables that could explain the academic attractiveness of each host country of the Visegrad Group. Furthermore, there exist statistically significant differences between the Visegrad Countries in respect of their attractiveness for foreign students, which was expressed by inbound mobility rate. The paper contributes to the literature by investigating the preconditions for national academic attractiveness.

Keywords: academic attractiveness, Visegrad group, Spearman's correlation

Introduction

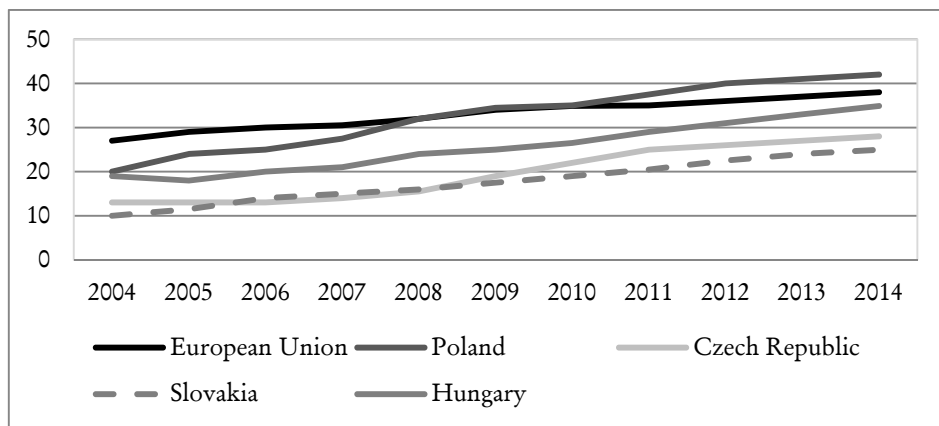
The Visegrad Group, established in 1991, is an informal group that began its existence in the Hungarian town of Visegrad, in which the former Czechoslovakia (now Czech Republic and Slovakia), Hungary and Poland signed a declaration on political, economic and cultural cooperation. When the main objective of the group was achieved in 2004, the countries redefined their goals of cooperation, the new foundation of which was to establish a strong position in the structures of the central European countries in the European Union (EU).

The functioning of the Visegrad Group countries within the structures of the EU had an enormous impact on many sectors of life of their citizens. Lack of physical boundaries between countries, automatic work permits, or universality in learning English meant that migration within the EU countries became natural. In the education sector the most important change, however, was the standardization of rules between the countries through the introduction of the Bologna process initiated in 1999 by 29 European countries (Kula, 2006) and currently implemented in 47 countries.

As a result of the establishment of the European Higher Education Area, among others, a three-part system of higher education, was introduced the ECTS system, cooperating in terms of ensuring the quality of education, and promotion of student and lecturer mobility. Among the benefits resulting from studying other cultures, differentiation of competence and exchange of experience, there are also advantages associated with greater professional mobility in the future.

Educational attainment levels of the population have improved significantly over the last thirty years. In 2014, 78.7% of people aged 25–54 in the EU-28 had at least attained an upper secondary level of education, compared with 61.4% of those aged 55–74. Those with tertiary educational attainment amounted to 31.7% of those aged 25–54 and 19.5% of those aged 55–74. The EU-28 had just over 20 million tertiary education students in 2012. Five EU Member States reported 2.0 million tertiary education students or more in 2012, namely Germany, the United Kingdom, France, Poland and Spain (Eurostat, 2015).

The constantly growing number of people with university education in the EU and the Visegrad Group translates directly into a quantitative increase in student and lecturer mobility (Fig. 1). According to the Erasmus Staff Mobility report, among the Visegrad Group countries, only Poland is in the “Top 5 sending countries” together with Germany, Spain, France and Turkey. According to the quoted report, the training mobility of employees increased in the academic year of 2012/2013 by 25% compared to the previous academic year (Fig. 2). Poland also belongs to the five countries organizing the largest Erasmus Intensive Programmes. The highest number of courses (56) was organized by Italy, which represents 10 % of the total number of courses organized in 2012–13. Germany and the Netherlands organised 43 courses each, followed by France (35) and Poland (30).



*Fig. 1. Tertiary education attainment levels (30–34 year olds)
for selected Central European countries.*

*Source: Education and training monitor 2015 –
http://ec.europa.eu/education/tools/docs/2015/monitor2015-poland_en.pdf*

The most notable example of credit mobility is given by the Erasmus mobility programme, with over three million students having participated in the programme between its start in 1987 and the academic year 2012/13 (European Commission, 2014).

Higher education institutions are crucial partners in delivering the EU’s strategy to drive forward and maintain growth: the Europe 2020 strategy for smart, sustainable and inclusive growth has set a target that 40% of people aged 30–34 in the EU should have a higher education qualification by 2020.

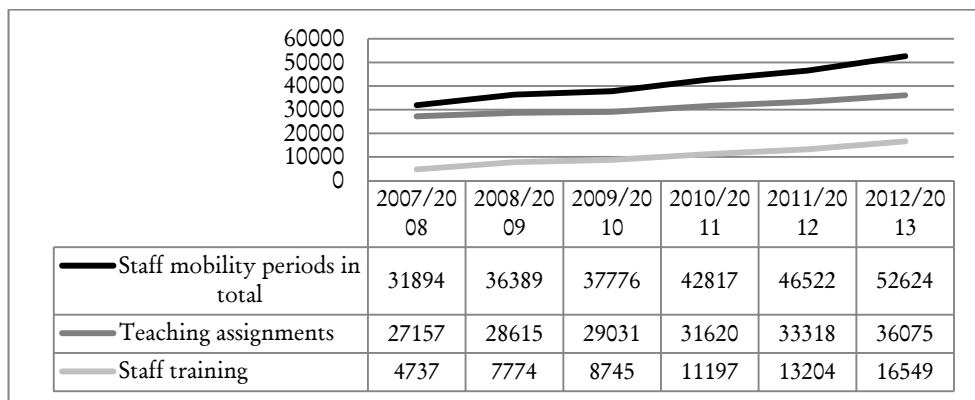


Fig. 2. Growth in staff mobility numbers from 2007–08 to 2012–13.

Source: Erasmus Staff Mobility – http://ec.europa.eu/education/library/statistics/ay-12-13/facts-figures_en.pdf

Academic attractiveness of a host country

Academic attractiveness of a host country could be referred to world-system theory, which emphasizes the core/periphery pattern as social contacts or a flow of people, which explains why students and researchers tend to travel to certain countries that are recognized as attractive (Stiglitz, 2007, Cremonini, Antonowicz 2009; Kolster, 2010). Limited by academic capability and a lack of sufficient technical skills, peripheral countries encourage students to pursue higher education in core countries with desired resources and knowledge to increase the level of education and thus facilitate the development of the nation (Altbach, 2003; Chen & Barnett, 2000; Knight, 2004; Marginson, 2006, Jiang K, 2014). Students make decisions about their study abroad on the basis of many push and pull factors. As far as the country’s attractiveness is concerned for the incoming students, the country itself is unable to influence the push factors (Mazzol & Soutar, 2002; De Wit et al., 2008). While choosing an academic destination the majority of students mostly value the ability of learning new languages (Ryan & Zhang, 2007), experiencing other cultures and customs and making new friends (Sánchez et al., 2006; Chen, 2007; Krzaklewska, 2008; Bodycott, 2009; Chung et al., 2009;

Counsell, 2011; Lee & Morrish, 2012). The only means the countries can compete to attract the potential students' interest remain pull factors (Kosmaczewska, 2015).

This article assumes that there is a rational explanation for the asymmetry among countries in attracting students and professionals from other countries. Thus defining and measuring academic attractiveness is important to assess where countries "stand on the map," identify the effects of different policy choices, and inform future policies (Cremonini & Antonowicz, 2009).

Taking into account that academic attractiveness is a multifaceted concept, which can be seen as part of "civilizational attraction", we have tried to assume some preconditions for national academic attractiveness using four dimensions such as: government support, academic standing, cost and safety of living in the host country and the tourist attractiveness.

Methods

The main aim of this paper was to identify independent variables that explain the dependent variable of inbound mobility rate in the four countries from the Visegrad Group. The statistical data of 5 years from 2008 to 2012 were analysed. The selection of the variables and years of the analysis was limited by the accessibility of quantitative data for four countries namely: Poland, Slovakia, The Czech Republic and Hungary. In this study, it was assumed that the variable of inbound mobility rate expresses the real academic attractiveness of the country for foreign students. Thus, the inbound mobility rate was estimated as a number of students from abroad studying in a given country, expressed as a percentage of total tertiary enrolment in that country (UNESCO).

Therefore, in this paper, three research hypotheses were advanced:

H₁: there exists a set of independent variables that have explained the academic attractiveness of each host country of the Visegrad Group,

H₂: the academic attractiveness of a host country always depends on four dimensions such as: government support, academic standing, cost and safety of living in the host country and tourist attractiveness,

H₃: there exist no significant differences between the inbound mobility rates of the Visegrad Group countries.

In order to verify the above presented hypotheses, Spearman's correlation coefficient and an analysis of variance test with post-hoc Tukey test were applied.

Results

The analysis consists of several major steps. At the first stage, based on the previous analyses, four dimensions of the academic attractiveness of a country for foreign students have been constructed.

Table 1

The set of variables that create four dimensions of the academic attractiveness of a host country (mean value from years 2008–2012)

Dimensions	Independent variables	Poland	Slovakia	Czech Republic	Hungary
Government support	Annual expenditure on public and private educational institutions compared to GDP per capita	28.02	22.26	23.78	26.80
	Gross domestic expenditure on R&D (GERD) – % of GDP	0.72	0.60	1.44	1.15
Academic standing	Graduates (ISCED 5–6) in mathematics, science and technology per 1000 inhabitants aged 20–29	15.92	17.52	11.24	7.98
	Percentage of all students in tertiary education enrolled in ISCED 6 and 7, both sexes (%)	97.43	94.03	86.37	88.93
	Employment rates of recent graduates	76.52	72.78	83.34	75.24
	Net flow ratio of internationally mobile students (inbound – outbound) (%)	-0.47	-9.95	5.39	2.09
Cost and safety of living in the host country	HICP – All items (HICP = Harmonized Index of Consumer Prices)	114.54	113.65	114.34	127.63
	Gross household saving rate	3.55	7.77	11.91	10.77
	Suspects and offenders – total per hundred thousand inhabitants	1353.43	1005.44	1121.87	1536.54
Tourist attractiveness	Arrivals at tourist accommodation establishments (non-residents)	4286414	1458819	6675577	3592970
Inbound mobility rate (%) – dependent variable		0.90	3.25	7.98	4.06

Source: UNESCO Institute for Statistics – <http://www.uis.unesco.org/Education/Pages/default.aspx>
Eurostat – <http://ec.europa.eu/eurostat/data/database>

At the next stage, the correlation between the independent variables and dependent variables has been tested using Spearman's correlation coefficient (Statistica 10). Spearman's correlation coefficient has been applied due to the fact that most of the variables did not have normal empirical distribution. As a result, it was indicated that five independent variables with the confidence of 0.95 and at a significance level lower than 0.05, have an essential impact on inbound mobility rate (Table 2).

Table 2

Spearman's correlation between independent variables and an inbound mobility rate (%) (dependent variable)

Independent variable	Poland*	Slovakia*	Czech Republic*	Hungary*
Gross domestic expenditure on R&D (GERD) – % of GDP	–	0.957 (0.010)	–	0.897 (0.010)
Percentage of all students in tertiary education enrolled in ISCED 6 and 7 (%)	–	–	0.680 (0.037)	–
Employment rates of recent graduates	–	–0.914 (0.030)	–	–
HICP – All items (HICP = Harmonized Index of Consumer Prices)	–	0.909 (0.032)	–	–
Arrivals at tourist accommodation establishments (non-residents)	0.900 (0.037)	–	–	–

**only significant correlations have been shown in the table 2 ($p < 0.05$)*

Moreover, in the case of Slovakia, the negative impact of employment rates of recent graduates on inbound mobility rate, was investigated. Taking into account that this independent variable has no significant influence on inbound mobility rate in the rest of the considered countries, we can conclude that employment rates of recent graduates is not a very important factor for foreign students, which might not encourage them to choose the particular country. Thus, it may be assumed that foreign students, who choose one of the Visegrad countries as their host country, have not considered the possibility of permanent changing of their home country.

As the Spearman's correlation coefficient indicated, different independent variables have a different impact on inbound mobility rates in each Visegrad Group country. Therefore, the results demonstrated that there does not exist one precise set of variables that could explain the academic attractiveness of each host country of the Visegrad Group. Hence, the first hypothesis should be rejected. Furthermore, the results indicated that academic attractiveness of a host country does not statistically depend on any of the four dimensions such as: government support, academic standing, cost and safety of living in the host country and tourist attractiveness.

Only, in the case of Slovakia, the academic attractiveness was expressed by variables, which were included in the three dimensions. In the case of the remaining countries, variables, which have a statistically significant influence on the inbound mobility rate were included only in one dimension. Hence, the second hypothesis should be rejected.

At the third stage, a one-way ANOVA was performed to find out the possible differences between the inbound mobility rate in each of the Visegrad countries, that could be considered statistically significant. Before applying ANOVA, the data were tested first for univariate normality and homogeneity of variance.

Table 3

One way ANOVA on inbound mobility rate and country

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	130.303	3	43.434	124.206	.000
Within Groups	5.595	16	.350		
Total	135.898	19			

According to ANOVA test results, there are significant differences between countries in an inbound mobility rate ($p = .000$; $F = 124.206$). The value of the test allows rejection of the third hypothesis and taking the alternative hypothesis assuming that there exist statistically significant differences between the Visegrad Countries in respect of their attractiveness for foreign students, which was expressed by the inbound mobility rate. The Tukey Honestly Significant Difference (HSD) test was adopted for further calculation to determine which means are significantly different from the other ones. The results of posteriori comparisons regarding the cognition dimensions are listed in Table 4.

Table 4

Value of p obtained in Tukey's HSD post-hoc test concerning the inbound mobility rate for the variable grouping the country.

	Poland	Slovakia	Czech Republic	Hungry
Poland		0.000226*	0.000185*	0.000186*
Slovakia	0.000226*		0.000185*	0.181036
Czech Republic	0.000185*	0.000185*		0.000185*
Hungary	0.000186*	0.181036	0.000185*	

*statistically significant differences observed between various groups ($p < 0.05$)

The Tukey's HSD post-hoc test revealed significant differences only between Slovakia and Hungary. Hence, it can be concluded that inbound mobility rate of Poland is significantly different from those observed in Slovakia, the Czech Republic and Hungary. Thus, Slovakia is different from the Czech Republic and the Czech Republic is different from Hungary with regards to the academic attractiveness.

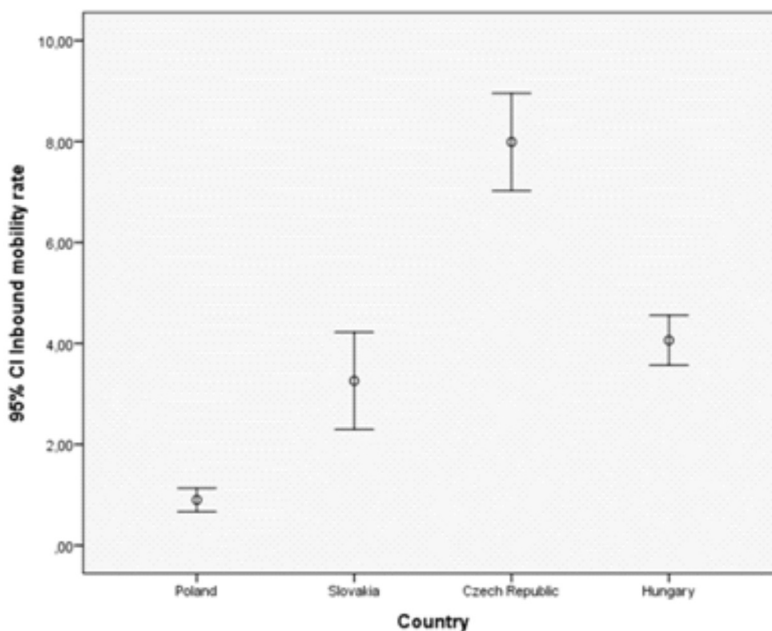


Fig. 3. The comparison of inbound mobility rate for the Visegrad countries (95% confidence interval for the mean)

Discussion and Conclusions

The results demonstrate that there does not exist one precise set of variables that could explain the academic attractiveness of each host country of the Visegrad Group. We can conclude that government support, academic standing, cost and safety of living in the host country, tourist attractiveness are not very important factors for foreign students.

However, mobility may have its roots not only in the tourist attractiveness or unemployment rate in a target country, but it may also arise from possible deficiencies in the education system in the country of origin. Thus, the only solution for increasing mobility may be the strategies of internationalization and mobility developed at the level of Ministries in respective Member States.

Armenia, France, Italy, Lithuania, Norway, Portugal and Slovenia have adopted national targets in line with the overall EHEA 20% goal. Austria, Belgium (Flemish Community), Denmark, Germany and Luxembourg have adopted more ambitious targets for outward student mobility. Austria, Denmark and Germany have a 50% target, while Belgium (Flemish Community) has a target of 33%. Luxembourg, a special case, has set a 100% target for the first cycle. It is currently achieved since all first cycle students must have a study experience abroad). Azerbaijan, Finland, the former Yugoslav Republic of Macedonia, Hungary,

Moldova and Turkey have set targets in terms of numbers of students going abroad. For example, Hungary has a target of 20 000 outward credit mobility students by 2020. Some countries, such as Finland and Estonia, have set more short-term targets. In Estonia, the internationalisation strategy specifies that by 2015 all doctoral students should have spent at least one semester in a foreign university (European Commission/EACEA/Eurydice, 2015).

Figure 3 gives more information on the mobility balance. It shows an obvious relationship between the mobility balance (X axis) and the outward mobility rate (Y axis): the higher the importing balance (on the X axis), the lesser the outward mobility rate (on the Y axis).

According to the presented matrix, Hungary and Czech Republic are characterized by a higher ratio of those incoming than those outgoing, while in Poland and Slovakia, the situation is reversed. Slovakia, however, has a higher rate of mobility.

The undertaken research allows to reject the formulated hypotheses for the countries of the Visegrad Group. Perhaps in further studies the list of variables should be modified or extended to all the EU-28. Another direction may be to adopt the same variables of academic attractiveness for students from outside the EU-28.

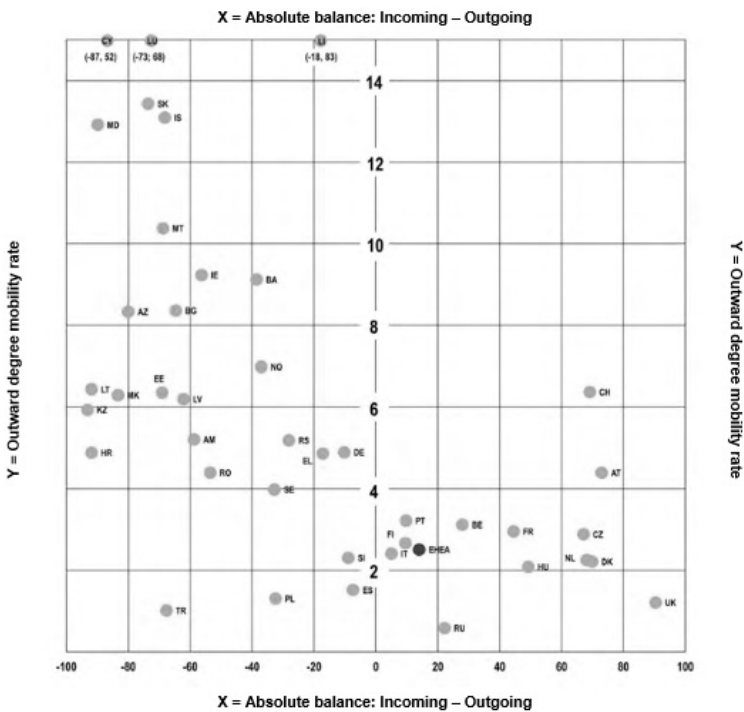


Fig. 4. Balance as a measure of the attractiveness of the education system of the country at tertiary education level (mobility flows within and outside EHEA), 2011/12

Source: http://eacea.ec.europa.eu/education/eurydice/documents/thematic_reports/182EN.pdf

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ENHANCING EMPLOYABILITY SKILLS FOR TOURISM AND HOSPITALITY INDUSTRY EMPLOYEES IN EUROPE

Ineta Luka, Dr.paed., Prof.
Turība University, *Latvia*

Abstract

Tourism has become one of the largest and fastest-growing economic sectors in the world. Hospitality industry largely depends on quality employees to provide exceptional service to its guests. Hence, relevant employability skills and competences are of particular importance. Previous studies demonstrate the significance of such employability skills as problem solving, teamwork, leadership, communication in foreign languages. The purpose of the current study, conducted within the framework of Erasmus+ project “Key Skills for European Union Hotel Staff”, is to analyze the industry needs and language teachers’ perceptions on teaching languages for tourism and hospitality industry Europewide in order to create a course that would foster the development of tourism specialists’ employability skills applying integrated language learning approach. The present contribution introduces the results of the survey of 85 language teachers of the partners’ education institutions and 131 top-level hotel and restaurant managers in whose enterprises the students undergo their industry training. Mixed method approach applying quantitative and qualitative data analysis was applied. The findings pointed to the significance of communication skills, collaboration skills and teamworking. Language teachers also emphasized intercultural competence. The findings showed the specific needs of each partner country, which are similar regarding English language competence, but vary regarding other foreign languages. Based on the findings of the needs analysis a language learning course has been created.

Keywords: employability skills, tourism and hospitality industry, language competence, language learning, needs analysis

Introduction

The twenty-first century has brought many challenges for people in all spheres. Addressing the human and social consequences of an international financial crisis, meeting development goals, encouraging green growth and responding to climate change, ageing societies and the knowledge economy (OECD Indicators of Education Systems, 2012) are the key issues at the centre of international debate. This is also evident in the EU strategic priorities till 2020, where the stress is laid

on “smart growth, sustainable growth and inclusive growth” (Europe 2020, 2010) and which are further elaborated in the corresponding documents and reports on education Europewide, e.g., *Education and Training 2020* (ET 2020, 2009), *Quality and Relevance in Higher Education* (2014), and in *Latvia Education Development Guidelines for the Period of 2014–2020* (Izglītības attīstības pamatnostādnes 2014.–2020. gadam, 2014), and various comprehensive studies worldwide, e.g., OECD study *Skills beyond School* (2014). All of them emphasize employability, high level employable transferable skills and the role of lifelong learning in enhancing their development. According to Klaus (2010) 75% of long-term job success depends on employees’ skills.

Moreover, the year 2015 has even been declared the *European Year for Development*. The motto of EYD2015, officially opened in Riga, Latvia on 16.01.2015., is “Our world, our dignity, our future” (The European Year for Development kicks off in Riga, 2015). This brings us to the issue of the significance of lifelong learning at all stages of our lives, including transition from formal learning into professional life. Furthermore, business environments are changing and to adapt to the new context employees have to engage in learning.

For employees this means a move from guaranteed lifelong employment to self-managed lifelong employability (Thijssen, et. al., 2008) which implies possessing knowledge and the skills to apply that knowledge in a multidisciplinary, team-oriented, dynamic environment and engaging in lifelong learning (Berdrow and Evers, 2011). Hence, flexible, innovative learning approaches and teaching/learning methods are gaining their momentum (Quality and Relevance in Higher Education, 2014).

Over the last ten years sustained interest in the pedagogy of employability has been observed (Pegg et. al., 2012). Various studies on employability skills over the years reveal similar trends – employers highly value the skills related with employees’ attitudes, communication and basic knowledge (Baxter and Young 1982; Casner-Lotto, et. al., 2006; Ju, et. al., 2012; Pigozne and Luka 2013). The current study focuses on the specific needs of tourism and hospitality industry and the development of employability skills for their employees.

The topicality of the study is underlined by the fact that tourism has turned into a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, infrastructure development. Over the past six decades, tourism experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. 1 in 11 jobs worldwide is connected with tourism (World Tourism Organisation Highlights, 2015). A substantial number is directly related with accommodation and catering sector. This stresses the demand for qualified staff in these sectors being able to speak several languages and work in the multicultural environment.

Furthermore, tourism as a service-intensive industry depends on quality employees to provide exceptional service to its guests (Zehrer, et. al., 2014; Kaufman and Ricci 2014). The quality of tourism product/service lies in intangible elements,

including the interaction between employees and customers during the service encounter (Bailly and Léné, 2014). Other relevant skills are occupation-specific skills and such transversal skills as communication, team-working, self-management, creativity, innovation (Learning while Working, 2011). Robles (2012) points to the top 10 soft skills considered as the most significant ones by business executives, including communication comprising oral, speaking capability, writing, presentation, listening skills. The studies on employability skills for tourism specialists (Bagshaw, 1996; Emenheiser, et. al., 1998; Tesone and Ricci, 2006; Kwok, et. al., 2012) emphasize the significance of intellectual, communication, management, organizational, intercultural skills. To sum up, employees in tourism must be qualified with regard to professional, methodological, social and leadership competencies and in order to develop them integrated approaches encompassing learning in natural environment should be applied (Zehrer, et. al., 2014). This points to the special role of languages in tourism where they are a primary tool for operating successfully. Language learning is not an isolated activity. Languages are learnt in professional setting and for the purposes of interaction. Language learning is not the aim but the means to become a professional in the field. Hence, the stakeholders' needs play a significant role in this process. The stakeholders' needs are analyzed below.

Methodological Framework

The Context

This study is conducted in the Framework of Erasmus+ project “Key Skills for European Union Hotel Staff” (Project No. 2014-1-HR01-KA2014-007224; project period 2014–2016). Six countries (Latvia, Croatia, UK, Italy, Slovenia, Romania) are collaborating on the project addressing the specific objective of Erasmus+ programme in the field of education and training: 1) to improve the level of key competences and skills (namely, employability skills and language competencies), with particular regard to their relevance for the labour market (tourism and hospitality industry) and their contribution to a cohesive society (providing better cultural awareness and increased language competence); 2) improve language teaching/learning and promote EU's broad linguistic diversity. The project is targeted at developing professional language competence in six EU countries in 12 languages (Croatian, English, French, German, Greek, Hungarian, Italian, Latvian, Slovenian, Romanian, Russian and Spanish) and raise hospitality industry employees' intercultural awareness.

This paper deals with the first project outcome – needs analysis report and designed curriculum for developing tourism and hospitality industry employees' employability skills, including language competence and raising employees' intercultural awareness.

Methodology

Exploratory research in line with pragmatism paradigm, applying mixed-method approach, quantitative and qualitative data analysis was conducted (Saunders, et. al., 2009; Collis and Hussey, 2009).

The purpose of the current study is to analyze the industry needs and language teachers' perceptions on teaching languages for tourism and hospitality industry Europewide in order to create a course that would foster the development of tourism specialists' employability skills applying integrated language learning approach.

Such a course would enable hospitality industry employees to ease transitions to working life more effectively and have access to opportunities to develop their employability skills (Learning while Working, 2011) and engage in self-managed lifelong employability.

The Sample

The study comprises two handpicked samples (O'Leary 2010) created for the research purposes: 1) the sample of all 85 language teachers of five partner education institutions (18 from Latvia, 22 from Croatia, 15 from Italy, 15 from Romania, 15 from Slovenia) and 2) 131 top level managers of hospitality enterprises from the five project countries (30 from Latvia, 34 from Croatia, 30 from Italy, 7 from Romania, 30 from Slovenia) recognized as experts in their field, in whose enterprises students have been undergoing their training.

Concerning the sample of language teachers, most of the 85 language teachers questioned taught English (36 teachers or 42.35%) and German (18 teachers or 21.18%), followed by French (8 teachers), Italian (7 teachers), Spanish (5 teachers) and then teachers of other languages (see Fig. 1).

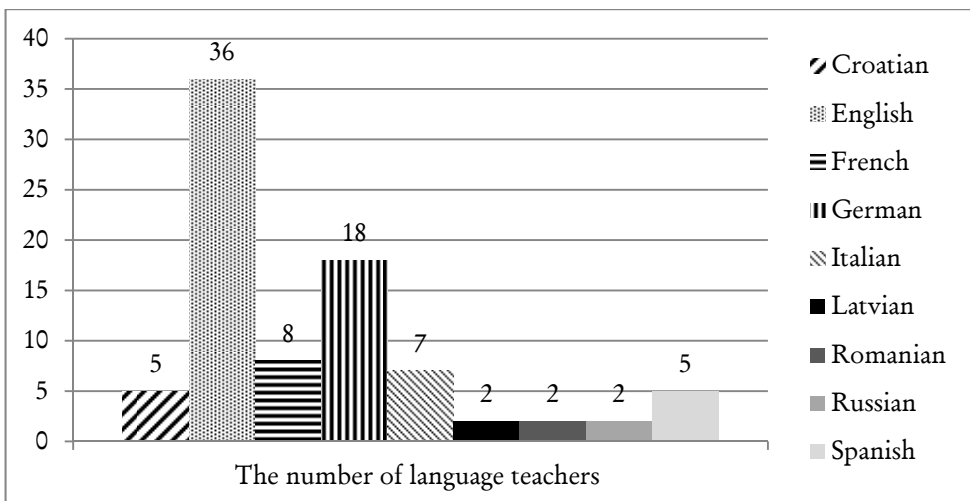


Fig. 1. The number of language teachers surveyed per language

Most teachers were experienced. Almost half of them (39 teachers or 45.88%) have been working as language teachers for the period of 10 to 19 years, 25 teachers (29.41%) – longer than 20 years. In general, all teachers have education either in philology (54.12%) and/or language teaching (57.65%). A considerable number of teachers (25.88%) have completed teacher training course outside university. 14 teachers (16.47%) have done language teaching course as a part of other degree programs.

The teachers questioned teach Languages for Special Purposes (225 answers) and 40 teach General Language (see Figure 2). Regarding the answer option ‘other’, respondents mentioned the following fields: Legal English, Computing, Racing, Medicine, Police, Technical English, Engineering, Public Administration, and Bookkeeping.

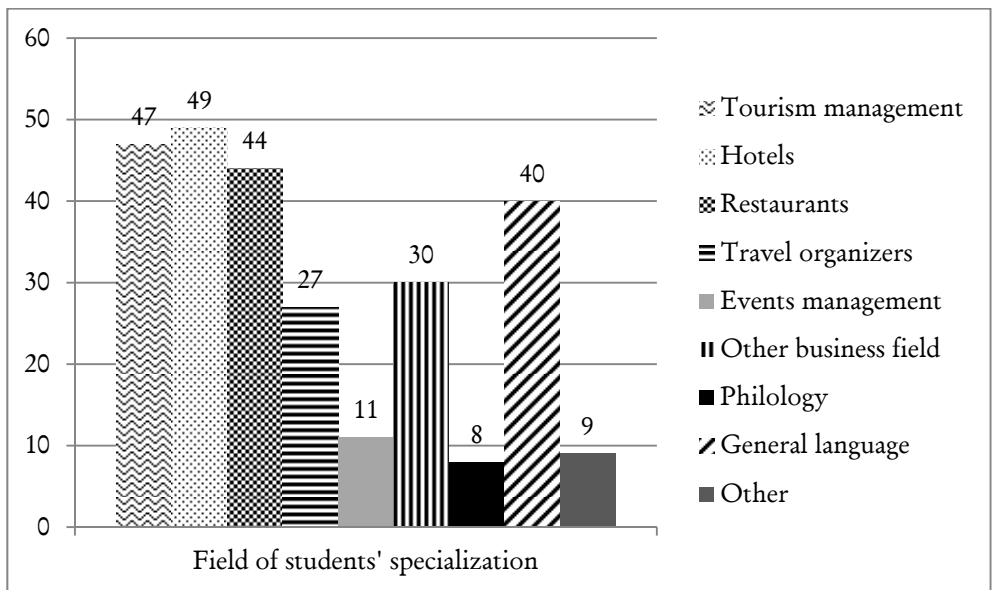


Fig. 2. Teachers' specialization field

Concerning the sample of tourism employers, most of the respondents were from the accommodation sector and they provided lodging services, including some kind of catering, 20 were directly connected with catering enterprises (see Table 1).

Table 1

Distribution of accommodation/catering enterprises according to their type

		Frequency	Percent	Valid Percent
Valid	5-star hotel	13	9.92	9.92
	4-star hotel	24	18.32	18.32
	3-star hotel	27	20.61	20.61
	2-star hotel	4	3.05	3.05
	Guest house	11	8.40	8.40
	Bed and Breakfast	11	8.40	8.40
	Hostel	2	1.53	1.53
	Youth hostel	3	2.29	2.29
	Campsite	2	1.53	1.53
	Restaurant	12	9.16	9.16
	Pub	7	5.34	5.34
	Bar	1	0.76	0.76
	Other	14	10.69	10.69
	Total	131	100.00	100.00

As it can be seen, most respondents represent 3-star and 4-star hotels which, according to the official country statistics, are the most required ones by tourists.

Most respondents speak English (120 respondents or 91.60%) and other foreign languages – German (63 respondents or 48.09%), Russian (35 students 26.72%), French (26 respondents or 19.85%), Spanish (17 respondents or 12.98%). Most Russian speakers are in Latvia, whereas German is a popular second foreign language in all countries. 19 respondents (14.50%) admit being able to communicate in Italian but those are not the respondents from Italy and Italian was a foreign language for them. 12 respondents (9.16%) indicate that they speak some other foreign language, among them Czech, Croatian, Polish, Serbian, Portuguese, Hungarian as a foreign language. It can also be noted that in Latvia respondents reported that they were equally adept at most foreign languages – English, Russian and German. However, in Slovenia the variety of foreign languages spoken was the most diverse.

All respondents were top level managers, enterprise owners or department managers (see Table 2).

Table 2

Respondents position in the enterprise

		Frequency	Percent	Valid Percent
Valid	Owner	19	14.50	14.50
	General manager	6	4.58	4.58
	Company manager	43	32.82	32.82
	Director	17	12.98	12.98
	Department manager	26	19.85	19.85
	Other	20	15.27	15.27
	Total	131	100.00	100.00

Category ‘other’ included such positions as hotel manager assistant (5), assistant general manager (2), manager’s consultant, senior MICE sales representative, employment and education manager (2), environment-protection manager, tourist information officer and 7 head receptionists or head office staff. It can be summarized that all respondents were the ones who could tell the most about general and specific needs of their enterprise. Thus, first-hand information was collected.

The Research Procedure

The needs analysis consisted of: 1) individual country needs analysis in five project countries, 2) comparative needs analysis, based on which the curriculum is designed.

The language teachers’ survey included 14 Lickert scale, choice and open questions containing 4 parts: information about teachers, students, teaching and the course. The hotel/restaurant managers’ survey included 21 similar questions about institution, employees, clients and respondent.

Both surveys were administered face-to-face; researchers visited tourism and hospitality industry enterprises and questioned their management. The survey of language teachers was administered at the partner institutions by distributing the questionnaire forms and collecting filled-in forms.

Quantitative data were analyzed applying SPSS software (descriptive and inferential statistics), qualitative data – applying content analysis (Saunders, et. al., 2009).

Findings and Discussion

The findings showed general trends and the specific needs of each partner country. Based on the theory analyzed the employability skills for tourism and hospitality industry employees and students were defined: leadership, teamworking, collaboration skills, intercultural competences, presentation skills, communication skills and an ability to use several languages at work. Regarding language competences the following language skills have been analyzed to find out the significance of each of them as well: monological speaking skills, dialogical speaking skills, listening skills, writing skills and reading skills.

Language Teachers’ Survey

Language teachers admitted the significance of all the skills and competences indicated: reading (mean 4.3647), writing (4.3467), listening (4.5647), dialogical speaking (4.6353), monological speaking (3.6353), communication (4.7059) and presentation skills (4.3059), intercultural competences (4.1529), collaboration skills (4.1529), teamworking (4.2235), leadership (3.5059). Figure 3 provides an overview of the opinion of the language teachers surveyed concerning the skills significance.

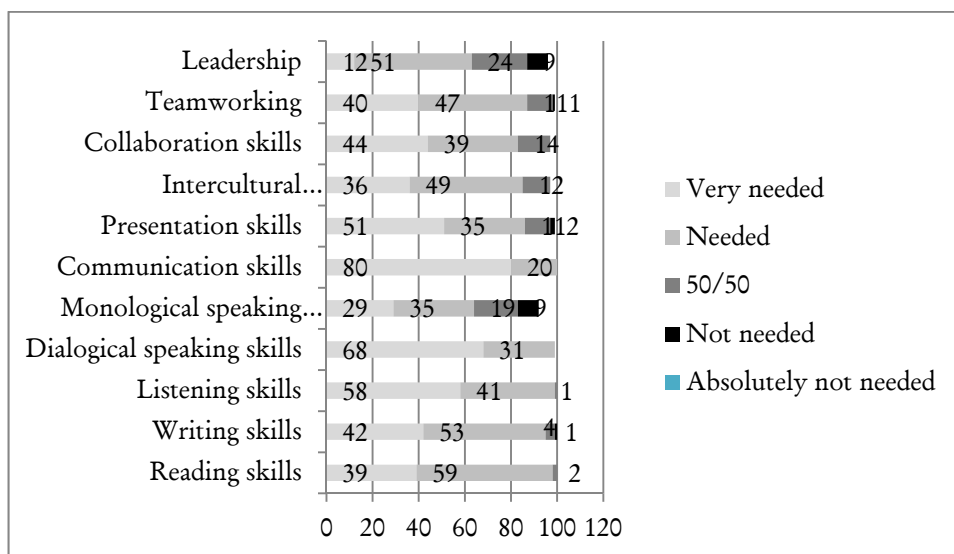


Fig. 3. Skills and competences necessary for students (by teachers), in %

A comparatively lower score was given to leadership, where only 10 respondents found it very necessary and 43 respondents – necessary for work at hotels and restaurants. This might be explained with the fact revealed in the answers to open questions where in many cases teachers associated leadership only with management positions.

As the conducted test for empirical distribution resulted in not normal distribution ($p=0.000$), non-parametric tests were further applied for inferential statistics (Baggio, Klobas, 2011). Kruskal Wallis test confirmed significant differences among countries regarding monological speaking skills ($p=0.007$) and leadership ($p=0.026$). Comparing the results of the partner countries, Italy demonstrates lower numbers of significance of monological speaking skills (mean=2.2667). However, this mean is impacted by the fact that three Italian respondents have not answered this question. Calculating the mean for those, who have answered the question, the result is 0.4839, which is similar to the means of other countries. A similar situation is observed regarding leadership where Italy also demonstrates a comparatively lower result (mean=2.4 vs. 3.9444 for LV, 3.7728 for HR, 3.7333 for RO, 3.4667 for RO) which is again explained with four Italian respondents failing to answer that question. To sum up, the findings show a trend that language teachers recognize a lower significance of leadership and monological speaking skills compared to other employability skills. The most popular foreign languages in the partner countries are English, German, French and Spanish. Comparing the results regarding those four languages it can be seen that the respondents predominantly admit the significance of dialogical speaking skills – all the respondents find them very significant or significant, except only 3% of English teachers have marked the answer ‘50/50’.

Kruskal Wallis test points to significant differences concerning the language taught: reading skills ($p=0.038$), monological speaking skills ($p=0.021$) and communication skills ($p=0.005$). Regarding communication skills, 83% of English teachers find them very significant and 14% significant. Similarly, 72% of German teachers and 88% of French teachers find them very significant and 28% of German teachers and 12% of French teachers find communication skills significant. However, only 20% of Spanish teachers find communication skills very significant and 40% – significant. Another difference is demonstrated concerning reading and writing skills. Contrary to the teachers of other languages, Spanish teachers point to predominance of writing skills (100%) and reading skills (80%). Moreover, English teachers find monological speaking skills more significant than other language teachers. 67% of English teachers find monological speaking skills very significant and significant compared to 50% of German teachers, 51% of French teachers and only 40% of Spanish teachers. This might be explained with the predominance of English as a tourism language in the partner countries, most business is conducted in English, and consequently most international presentations are given in English, too.

Regarding language teaching/learning methodologies, teachers emphasized students' active involvement in different learning activities, students' independent studies, projects, dialogues, discussions, and case studies in lectures. It was also mentioned that students' motivation to learn languages increases after their training in the industry, especially if they have done it abroad. Thus, teachers often incorporate tasks of intercultural relevance in their lectures to create a more natural learning environment. Figure 4 summarizes the methods and tools used by the teachers in their language classes.

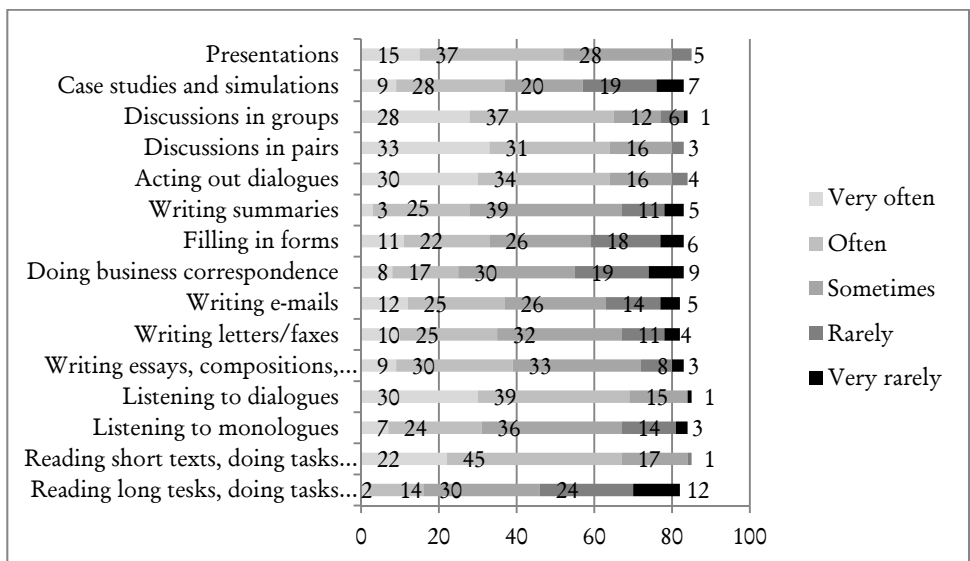


Fig. 4. Methods and tools used by the teachers in language lectures, n = 85 max

As it can be seen, teachers prefer listening to dialogues (69 teachers or 81.18% do it very often or often), reading short texts (67 teachers or 78.82%), using discussions in groups (65 teachers or 76.47% practice them very often or often), discussions in pairs and acting out dialogues (64 teachers or 75.29% for each of the activities). Whereas, the least favourite activities are as follows: reading long texts and doing tasks on them where only 16 teachers (18.82%) admitted practicing it during their lectures, listening to monologues (31 teacher or 36.47%). It also has to be emphasized that teachers ask their students do writing tasks less often than other tasks. The answers range from 25 teachers or 29.41% (doing business correspondence) to 39 teachers or 45.88% (writing essays, compositions and reports). This can be explained with the limited amount of class hours (lectures), especially at universities, and teachers prefer productive and interactive methods instead to attain the goal.

Contrary to the analysis above, Kruskal Wallis test pointed out significant differences between the countries regarding the use of the methods and tools in developing students' employability skills. Significant differences were found in 11 items out of 15 ($p=0.002-0.044$). The differences were not found only in the following activities: reading long texts ($p=0.057$) where the respondents predominantly were not in favour of asking students to read long texts in class, listening to monologues ($p=0.146$) where the most frequently mentioned answer was 'sometimes', listening to dialogues ($p=0.282$) and acting out dialogues ($p=0.295$). In terms of countries, more similarities were discovered between answers of Italian and Croatian colleagues, as they both represent vocational schools. Universities (Latvia, Romania) demonstrate more differences as their curricula differ.

Cronbach's Alpha test confirms excellent internal consistency and extremely high validity ($\alpha=0.938$; $s=0.936-0.939$).

Qualitative data confirm the findings of quantitative data regarding teaching/learning methods applied by language teachers. The key words from answers to qualitative questions about teaching/learning methods used can be grouped into three categories:

- 1) key words connected with language teaching/learning methods and approaches,
- 2) key words associated with learning environment,
- 3) key words connected with occupation and employability.

Characteristic examples of key words of the first group are: *communication, communicative approach, speaking, listening, reading, writing, student-centred approach, interaction*. The first group of key words is specifically connected with special language teaching/learning methods. These key words dominate in answers of all partner countries, all languages taught and all education institutions. Below is provided a typical example by the English teacher from Italy teaching English to students of Catering Vocational school, future restaurant employees:

I generally use a communicative approach based on simulating dialogues and interactions. I mostly focus on developing and improving the four basic language skills: listening, speaking, reading and writing both in General English and in ESP. (Language teachers' survey, Respondent 49)

A teacher of Russian for Special Purposes in Latvia teaching tourism students aged 20 and older also supports the same ideas:

I use communicative approach, interactive activities, role plays, simulations. A lot of accent is put on listening and speaking, analytical skills development. (Language teachers' survey, Respondent 7)

The provided examples illustrate that these are typical approaches and tools used both for teaching young students and adults to any Language for Special Purposes, and, considering also the findings of quantitative analysis, they can be generalized.

Learning environment is of utmost importance in language learning. Typical key words for the second group are: motivating, encouraging, assisting, teaching through national cultures, relaxed atmosphere, natural learning environment, electronic support. Teachers extensively stress the role of positive, relaxed atmosphere promoting students' learning. For example, an experienced German teacher from Croatia teaching young adults of Hotel Management Specialization at Vocational school stresses the significance of positive, stimulating atmosphere:

I am trying to create positive atmosphere where students are not afraid to speak or make mistakes – mistakes as a tool to improve language learning. Teacher is a person who facilitates language learning in arranging a situation where students are able to learn from discovering language themselves, however, with clear aims and tasks. (Language teachers' survey, Respondent 19)

This is in line with the principles of social constructivism which approves the idea of creating definite conditions for language learning and helping, assisting students to learn. The idea is supported by an experienced English teacher from Latvia teaching tourism students:

One cannot teach a language, one can provide the help to students to learn a language. Social constructivism approach definitely. (Language teachers' survey, Respondent 1)

and an experienced Spanish teacher from the same university:

Different ways, but the teacher has to be an assistant, helper, orientation person who needs to guide students to get good results. Students are the ones who need to do the efforts through the tools the teacher provides them. (Language teachers' survey, Respondent 3)

Language teachers from all institutions surveyed admit also the significance of incorporating cultural elements in language teaching/learning. It is especially observed in the answers of language teachers from Latvia, Italy and Croatia. For example, a French teacher from Latvia, teaching tourism students aged 20 and older, indicates that she is creating tasks that develop students' intercultural competences through the culture of the target country, in her case – France (Language teachers' survey, Respondent 11).

The third group of key words is associated with students' future occupation which stresses the special function of language learning for occupational purposes –

language is a tool for learning one's future profession. The quotation by an experienced Business English teacher from Slovenia teaching young adults:

My philosophy of language teaching is to teach my students to effectively communicate in a foreign language (being resourceful in everyday situations and their professional career), motivate my students to become independent thinkers, take control of their own learning (which is not easy to achieve). (Language teachers' survey, Respondent 72)

The teachers repeatedly stress the role of language for students' future profession. An example by a French teacher from Croatia teaching young students specializing in hotels, restaurants and travel organizations:

My philosophy of language teaching is based on communication and on professional vocabulary which students can use in their future business. I mean, at the reception desk and in travel agency. (Language teachers' survey, Respondent 38)

The characteristic keywords of the third group are: *cases from life, simulations, dialogues in the field, occupational skills, language for business, teaching through economy, professional skills.*

It has to be added that findings from the qualitative part overlap. For example, on the one hand, learning environment can be singled out as a separate category because many attributes for it are discovered in the answers. On the other hand, it can also be included in the third category, especially in terms of creating professional learning environment associated with hotel, restaurant, travel agency. Findings from the qualitative part indicate that teachers have increasingly stressed the same methods and tools as in quantitative research, which leads to a conclusion of their significance and the necessity of incorporating them in the curriculum to be developed.

Managers' Survey

In order to create the language learning course for the industry it is important to find out the end users of the course and their specific needs. Firstly, visitors' source countries have been identified. The hotel/restaurant management surveyed indicate that their clients are different groups of people: business people (89 answers or 67.94%), tourist groups (105 answers or 80.15), individual travellers (123 answers or 93.89%), families with children (104 answers or 79.39%) as well as students and student groups and sports teams. In general, tourists come from all the countries represented by the project partners and also from all the countries the languages of which the project is dealing with. Most respondents indicate that they have tourists from Germany (90.84%), Italy (76.34%), the UK (74.05%), France (72.52%), Spain (67.18%), Russia (52.67%), Croatia (49.62%), Slovenia (45.04%), but there are also tourists from Hungary (36.64%), Latvia (29.77%), Romania (25.95%), Greece (23.66%), Austria (13.74%), Estonia (9.92%), Lithuania (9.16%), the USA (8.40%) and Poland (3.05%). The distribution of countries varies. For example, in Latvia most inbound tourists come from Russia, Germany, the UK,

and Spain. Latvia has a comparatively high number of tourists from Estonia and Lithuania. Inbound tourists to Croatia are predominantly from the UK and Germany. The South Europe – Montenegro, Slovakia, Serbia, Italy, – is another popular target group. There are fewer tourists from Latvia, Romania and Greece. In Slovenia most international tourists are from Croatia, Germany and Italy. Most tourists of Romania are from Hungary and Germany. Italy reports that most of their inbound tourists come from the UK, France, Spain, Germany, Russia and other countries such as the USA, China and Japan. Without doubt, English is the most popular foreign language and it is spoken by most tourists in all countries (95.40%). The second place is taken by German (85.50%), which is especially popular among tourists visiting Slovenia. Russian is a popular language spoken by tourists in Latvia (29 answers or 96.67%), other countries also report Russian as a significant language. It can be concluded, that in order to provide qualitative service, it is important for hotel and restaurant employees to communicate in major international languages and the language of their main tourism market would definitely be an advantage, as it could increase their employability. As pointed out by the hotel manager of a 3-star hotel in a small town in Croatia:

It is very important that the hotel staff speaks more languages and speaks them properly. It is important in order to create good reputation about the hotel and destination in general. I would be delighted if learning foreign languages helped to structure tourism business and to all organisations involved in tourism. (Employers' survey, Respondent 35)

Moreover, this is especially important in the given situation in which, according to managers, 76.34% of staff are in daily contact with foreigners and have to speak a foreign language.

Bar and restaurant manager of a 3-star hotel situated on the outskirts of a tourism city of Croatia points to the necessity of the language course to upgrade staff skills and competences:

I think the course is really needed, because we are a touristic city (a seasonal city). It's always good in winter time to have a course for all staff but it must be every year because there is always someone who wants to learn more. Tomorrow that person will be a new leader. The course is especially needed for waiters, kitchen staff, reception and housekeeping. (Employers' survey, Respondent 40)

The situation regarding language competence of the employees is depicted in Table 3.

Table 3

Information about the staff skills of major foreign languages, n=131

	At least one staff member speaks English	At least one staff member speaks Russian	At least one staff member speaks German	At least one staff member speaks French	At least one staff member speaks Italian
Mean	1.0000	.2443	.4656	.0992	.3511
Median	1.0000	.0000	.0000	.0000	.0000
Mode	1.00	.00	.00	.00	.00
Std. Deviation	.00000	.43131	.50073	.30013	.47916
Sum	131.00	32.00	61.00	13.00	46.00
%	100	24.42	46.56	9.92	35.11

The mode points to the fact that in the enterprises surveyed English is the only major foreign language represented wherein at each institution at least one staff member speaks English. In most cases, where there is only one person speaking English, it is the enterprise manager. 9.92% of respondents admitted that at least one staff member in their enterprise speaks another major foreign language. Different languages were mentioned, even those not covered by the project, such as Czech, Swedish, Polish, etc.

Regarding the language competence level, employers evaluate their employees' English language competence as average, good and very good, depending on the department the personnel works. The English language competence of management (mode=5, which means very good; mean=3.2977) and reception staff (mode=5; mean=3.8473) is much higher than that of other employees (mode=3.00 average for kitchen and housekeeping staff and mode=4 for waiters and barmen).

In the project the language courses of two different levels are created – for those with a limited language competence level (A2/B1) which is oriented more towards developing learners' communication skills and intercultural competences, and a more demanding B2/C1 level language course for tourism professionals and tourism students. The results show that the English language course of A2/B1 level will be suitable for kitchen staff and housekeeping staff as their English language skills are on a low level. The English language course of B2/C1 level might be useful to management and reception staff to raise their language competence level as well as their general and specific skills in the field using language learning materials. The employees of the institutions speaking Russian have a good and very good level of the Russian language competence, thus the Russian language course of A2/B1 level will not be suitable for the employees already communicating in Russian. The course might be suitable for employees who need to possess Russian language competence but have no preliminary language skills. Similarly, it might be useful to foreign students of Turiba University who do not have any prior Russian language skills and who are

studying the course from 0 level during their university studies. The employees have a very low level of German and French language competence, so A2/B1 language level course might be useful for them.

Regarding the necessity of certain skills, employers indicate that language skills (listening skills, dialogical speaking skills, communication skills and reading skills) are very significant to succeed in hospitality industry. The mode regarding all these skills is 5.00 and the median 5.0000, except it is 4.0000 for reading skills. The lowest mean (2.6031) and median (3.0000) is given to monological speaking skills. The employers also highly evaluate other skills and competences, such as teamworking (mode 5.00), presentation skills (mode 4.00), leadership (mode 4.00), collaboration skills (mode 5.00) and intercultural competences (mode 4.00). Figure 5 summarises the findings about the skills necessary in accommodation and catering sector in view of employers.

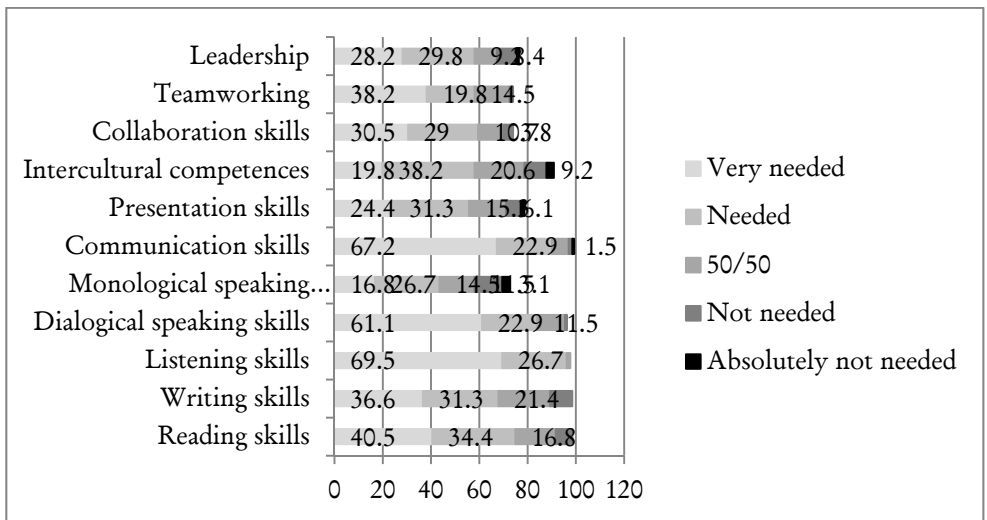


Fig. 5. Skills and competences necessary in accommodation and catering business, %

The conducted test for empirical distribution, similarly to language teachers' survey, confirms not normal empirical distribution ($p=0.000$), therefore, non-parametric tests have been applied for inferential statistics of employers' survey as well (Baggio, Klobas, 2011).

Kruskal Wallis test revealed an absolutely different situation from the language teachers' survey. If in the language teachers' survey there were not discovered many significant differences regarding the necessary employability skills, the employers' survey pointed to very many significant differences. The following groups of differences have been identified:

- 1) according to the respondents' country – the necessity of employees' reading ($p=0.019$), listening ($p=0.000$), dialogical speaking ($p=0.005$), monological speaking ($p=0.000$) and presentation skills ($p=0.000$), as well as intercultural competences ($p=0.000$), collaboration skills ($p=0.000$), teamworking ($p=0.000$), leadership ($p=0.000$),
- 2) according to the enterprise location (city centre, business district, outskirts, rural area, etc.) – the necessity of employees' reading ($p=0.044$), writing ($p=0.007$), listening ($p=0.001$), monological speaking ($p=0.005$), and collaboration skills ($p=0.011$), as well as leadership ($p=0.047$),
- 3) according to the enterprise type – the necessity of employees' reading ($p=0.003$), writing ($p=0.000$), listening ($p=0.004$), communication skills ($p=0.000$), and intercultural competences ($p=0.000$),
- 4) according to the hotel size – the necessity of employees' reading ($p=0.005$), and writing skills ($p=0.000$), and intercultural competences ($p=0.039$),
- 5) according to the restaurant size – the necessity of employees' teamworking ($p=0.049$), and leadership ($p=0.033$),
- 6) according to the number of employees – the necessity of employees' reading ($p=0.001$), writing ($p=0.000$), monological speaking ($p=0.003$) and presentation skills ($p=0.007$), intercultural competences ($p=0.007$), collaboration skills ($p=0.012$), teamworking ($p=0.001$), leadership ($p=0.004$).

These findings show that in most situations it is not possible to generalize the survey results and a specific institutionalized needs analysis is required before starting the language course to suit the specific context and employees. Moreover, a separate institutional needs analysis is required for every language on target.

Cronbach's Alpha test demonstrates excellent internal consistency and extremely high validity ($\alpha=0.937$; $s=0.932-0.938$) which confirms the conclusion that the results of the employers' survey significantly differ and cannot be generalized. These results are also validated by the expressions from the employers' survey in which respondents indicate specific requirements of their institutions. For example, Sales and Marketing director of a 4-star hotel situated in a business district of Riga, Latvia stresses the necessity to include in the course the terminology of hospitality industry (Employers' survey, Respondent 13). The employers from Romania indicate that listening skills, dialogical speaking skills, communication skills, teamwork and collaboration skills are very important to succeed in hospitality industry and they suggest choosing the tools and methods that promote their development. In turn, the employers from Slovenia highly value intercultural competence, team working skills, collaboration skills and leadership; therefore, when creating the course, methods and tools that promote their development have to be selected. Sales and Marketing manager of a 5-star boutique hotel from Croatia summarises their hotel needs: "Proactive learning definitely; small groups, maximum 6–8 persons; creating usual daily situations and role playing them. This is the best way to improve all the needed skills, especially communication skills." (Employers' survey, Respondent 58) The following paragraph clearly emphasises the various needs of tourism enterprises.

The Created Course

Considering the theoretical analysis done and the analysis of country tourism statistics (which is beyond the scope of the current paper and therefore is not presented here), the topics for the two language courses A2/B1 and B2/C1 have been identified and employers had to evaluate their correspondence to the tourism and hospitality industry as they are directly involved in creating tourism product and are aware of the industry's needs. In turn, language teachers evaluated the suitable teaching/learning methods to be applied for the given language courses.

The following topics were suggested for A2/B1 language course: 1) Hotel Reception, 2) Restaurant, 3) Restaurant Kitchen, 4) Hotel Conference / Business Centre, 5) Getting oriented in a City, 6) Management Offices, 7) Housekeeping. The means are from 2.2061 to 3.4656. Although they are not very high, the modes for all variables, except Hotel Business Centre, are 4.00 and 5.00, medians 3.0000 or 4.0000, which indicates that the majority of the respondents approves the inclusion of the given topics in the curriculum. For the module Hotel Business Centre, the median is also lower – 2.0000. However, it is recommended to include this module in the curriculum as 48.85% (nearly a half) admit that this module is important. It is especially important for students, future managers therefore, the module is included in the curriculum. The second lowest mean (2.6870) is for the module Housekeeping. Although the mode is 4.00, based on the analysis of the institutional needs analysis results, it is decided to exclude the module Housekeeping from the A2/B1 course as according to the needs analysis results, housekeeping staff are not in frequent direct contact with international guests. In terms of country needs, Kruskal Wallis test indicates a significant difference in the following variables: Hotel Business Centre ($p=0.001$) and Housekeeping ($p=0.000$). This means that these two modules can be considered for further analysis regarding their inclusion in the curriculum of definite institutions, presuming there is a higher demand or no demand at all for them.

The following topics were suggested for B2/C1 English language course: 1) Hotel Front Office, 2) Catering Services, 3) Conference and Business Services, 4) Off-site Services, 5) Financial Management, 6) Hotel Management, 7) Housekeeping. The results show that, in general, employers approve of the inclusion of the given topics in the curriculum for hospitality industry employees. A comparatively lower score is given to the modules Financial Management (mean=1.9847, median=2.0000) and Housekeeping (mean=2.1756, median=2.0000). However, the employers recommend including the module Financial Management in the curriculum. Moreover, this module is also significant for university students to study their professional subjects. Therefore, the module Financial Management has been included in the curriculum. The employers do not recommend the inclusion of the module Housekeeping in B2/C1 English language course, as mentioned above housekeeping staff is not in so much contact with foreign tourists and B1 level is sufficient for everyday communication. Therefore, the module "Housekeeping" may be removed.

Conclusion

Based on the findings of the needs analysis A2/B1 level language learning course in 12 languages and B2/C1 English language course have been created. The courses have been created considering general trends in all the partner countries and the specific needs of each partner's educational institution. Apart from the modules to be included in the course curricula, the needs analysis results also pointed to the possible tools and teaching/learning methods to be included in the course. In general, methods stimulating collaboration, interactivity, and communication have to be used as well as attention has to be paid to developing learners' reading and writing skills.

However, the focus of A2/B1 language course should be on short texts, simple writing and listening tasks, lots of pair work, especially role-plays and simulations, including some specific vocabulary tasks and writing tasks. It should also include field work, where students could get first-hand information necessary to succeed in the hospitality industry.

In turn, respondents suggested a variety of tasks to be used in B2/C1 level English language course. Suggestions for the course are individual but they must specify target audience for better results. At this language level, the focus will be on longer, more demanding texts and tasks, on comprehensive writing tasks, case studies, simulations and problem solving tasks to develop both students' language competence and their employability skills, such as, collaboration, problem solving and leadership.

Considering the results of language teachers' survey, no significant differences have been discovered in terms of methodology applied therefore its results may be generalized. Contrary to the language teachers' survey, employers' survey pointed to significant differences in terms of the specific needs of each country, even each hospitality enterprise, which means that in order to better develop employees' language competence it is vital alongside with the joint needs analysis to conduct institutional needs analysis considering the specific needs of the target enterprise. Therefore, slight modifications as to the course content may be applied. Taking this into account, the teaching/learning materials will be accompanied with pedagogical guidelines on how to apply the tasks as well as provide suggestions and ideas on further skills development.

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ENTERPRISE INCOME TAX AND SOCIAL INSURANCE MANDATORY CONTRIBUTIONS OF SMALL ENTERPRISES IN A CHANGING ENVIRONMENT IN POST CRISIS LATVIA

Anna Medne, Mag.oec., Mag.paed., Mag.agr.
Sandra Medne-Jēkabsone, Mag.oec.
Turība University, Latvia

Annotation

Around 98% of the enterprises in Latvia are small enterprises that employ around 47.6% of those employed and similar to the EU form a significant part of the national economy. The significance of small enterprises to the Latvian national economy determines the necessity for analysis and scientific research to develop taxation policies appropriate for the functioning of these enterprises.

The authors have studied the changes in the normative enactments regarding enterprise income tax and mandatory social insurance contributions for small businesses during the period 2010–2015. The research covers the following taxes – Personal income tax, State mandatory social guarantee payments, Enterprise income tax and Microenterprise tax.

During the global crisis when a downturn was also observed in the Latvian economy, Latvia carried out important taxation enhancement measures for small and medium sized businesses out of which the implementation of differentiated taxation rates of microenterprise tax and personal income tax for entities carrying out economic activities must be positively evaluated. The authors highlight the irregularity and unpredictability of taxes as an important issue to be resolved that also has an impact on foreign investments in Latvian entrepreneurship. Frequent tax changes are not sufficiently well coordinated with the taxpayers who lack awareness and understanding of them. In fact the opposite approach is the common practice in Latvia when taxation changes are first introduced and then public discussions are started which often lead to these changes being repealed. The coordination of interests of taxpayers and tax administrators in a timely and reasoned manner is a necessary prerequisite for development of the taxation policy in the future.

Keywords: tax, direct taxes, income taxes, state mandatory social guarantee payments, tax rates, small businesses

Introduction

Research environment – Tax environment in Latvia.

Research object – Small businesses

Research goal – Study the changes in enterprise income tax and mandatory social insurance contribution rates

Research period – 2010–2015.

Latvian small and medium sized enterprises (merchants) similar to those in the European Union (EU) form a significant part of the national economy and play an important role in the creation of GDP and jobs. Small and medium sized enterprises (SMEs) in the EU are defined in accordance with the number of employees and their annual turnover or annual balance sheet total. This definition is stated in the EU legislation (European Commission regulation 800/2008 Annex 1), in accordance with which the following division of enterprises has been determined (European Commission, 2008)

Table 1

Classification of enterprises according to their size in conformity with EU normative enactments

Company category	Employees, Annual work unit (IDV)	Turnover	or	Balance sheet total
Medium	< 250	≤ EUR 50 m		≤ EUR 43 m
Small	< 50	≤ EUR 10 m		≤ EUR 10 m
Micro	< 10	≤ EUR 2 m		≤ EUR 2 m

It is important that the upper limit for the number of employees is obligatory but **it is allowed to exceed** the upper limit for one of the financial indicators (annual turnover or annual balance sheet total), to **retain** the relevant company **status**.

The annual turnover is determined by calculating the revenue that the company has received during the year from the sale of its products and services. The annual turnover is calculated without including VAT or direct taxes.

A company is any subject that carries out economic activities irrelevant of its legal form. Self-employed persons as well as family enterprises that deal with craftsmanship or carry out other activities as well as partnerships and associations involved in economic activity also fall under this category (section 1). The number of employees is expressed as annual work unit (IDV). One IDV is each and every full time employee who works for the company during the whole reporting year. Employees who do not work full time for the enterprise or seasonal workers are considered as a fraction of IDV. (European Commission, 2008)

Table 2

Important indicators for SMEs in Latvia in 2012 (SBA fact sheet, 2012)

Company Category	Number of Companies			Employment		
	Latvia		EU 27	Latvia		EU 27
	Number	Proportion %	Proportion %	Number	Proportion %	Proportion %
Micro	70 011	88.7%	92.2%	148 382	21.15%	29.6%
Small	7 313	9.35%	6.5%	144 307	26.45%	20.6%
Medium	1 0408	1.8%	1.1%	131 148	24.0%	17.2%
SME	78 732	99.8%	99.8%	423 837	77.4%	67.4%
Large	195	0.2%	0.2%	123 743	22.6%	32.6%
Total	78 927	100%	100%	547 580	100%	100%

The abovementioned classification is representative of Latvia as well EU member states. According to the table 2 data the proportion of small and medium sized enterprises in Latvia as well as in the EU account for 99.8% of the total number of enterprises and 98% of the total are micro and small enterprises. 77.4% of the workforce in Latvia are employed by small and medium sized enterprises including 47.6% who work in micro and small businesses, whereas in the EU the proportion is 67.4%; this proves the significance of such enterprises in providing jobs. The table 2 data confirms that micro enterprises in Latvia employ on average two employees which can be explained by the fact that according to the European Commission regulation 800/2008 Annex 1 self-employed persons are also counted as microenterprises. Based on the statistical data gathered the authors have further analysed the direct impact of income tax on micro and small businesses.

Apart from the abovementioned company classification there exists a specific microenterprise classification in Latvia in accordance with the section 1 of the “Law on Microenterprise tax” that states that microenterprise is an individual merchant, an individual undertaking, a farm or fishing enterprise, as well as a natural person registered as a performer of economic activity at the State Revenue Service, or a limited liability company, if they conform to all of the following criteria:

- the participants (if any) are natural persons,
- the turnover does not exceed 100 000 euros in a calendar year,
- the number of employees does not exceed five at any time (Micro-enterprise Tax Law, 2010).

The small enterprises studied under the present research also included micro enterprises (refer Table 2).

Discussion

After the economic downturn or the crisis period in Latvia several significant changes were made in the application of taxes which primarily concerned small

businesses. Latvian economic growth started its revival in 2010 primarily due to an increase in its exports. The GDP for the 1st quarter of 2010 already showed a 0.3% increase in comparison to the previous quarter after seasonal adjustments of data. The year 2011 was significant as the Latvian economic recovery was acknowledged internationally and international rating agencies increased Latvia's credit ratings. The amendments adopted in May 2010 in the Commercial law significantly decreased the costs of starting a business in Latvia enabling limited liability companies (SIAs) to be established with decreased authorised share capital (starting from 1 euro). (Report on Latvian economic development December 2011, 2012) The State duty for registering such SIAs was also reduced. In accordance with data from the Register of Enterprises for 2014, 60.7% of the SIAs were registered with a reduced share capital. Starting from 1st September 2010 legal and natural persons could get the status of micro enterprise taxpayer if they met certain criteria and could pay microenterprise tax to the tune of 9% of their turnover from economic activities. (Report on Latvian economic development December 2014, 2015)

According to Register of Enterprises data the most popular forms of entrepreneurship among active economic subjects in Latvia in January 2015 were limited liability companies (SIAs) – 65% and individual merchants – 8%. In turn, according to Lursoft statistical data almost a third of share capital of limited liability companies was from Foreign Direct Investment (hereinafter FDI).

The abovementioned improvements in the business environment gave significant contributions in terms of an increase in the number of newly registered, e.g. an increase of 135% in 2011 in comparison to 2009. A slight decrease in the number of newly registered SIAs can be seen during the period 2011–2014, but they still significantly exceeded the number of SIAs registered in 2010. (refer Fig. 1.).

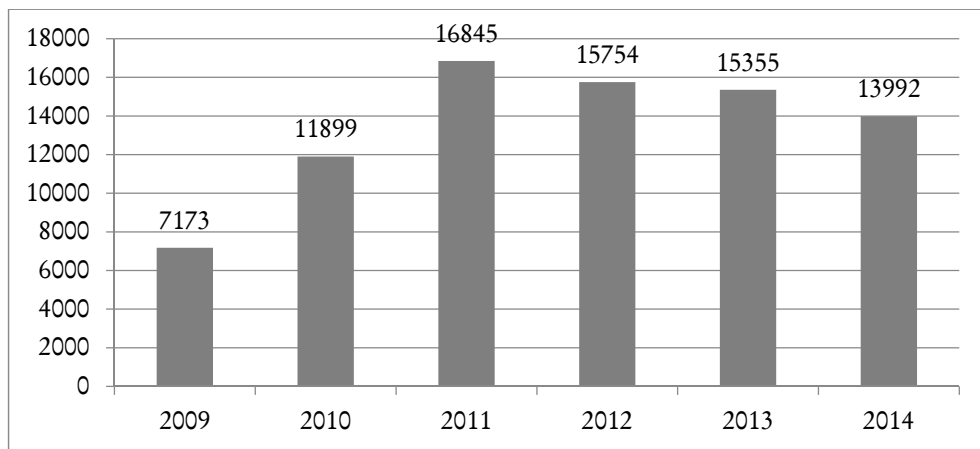


Fig. 1. Dynamics of Limited liability companies registered in Latvia, 2009–2014. (Lursoft statistics, 2015)

The following state taxes and their respective legislation were in force in Latvia in 2015 in accordance with the section 8 of the Law on taxes and Duties:

- 1) Personal income tax – On Personal Income Tax;
- 2) Enterprise income tax – On Corporate (Enterprise) Income Tax;
- 3) Immovable property tax – On Immovable Property Tax;
- 4) Value added tax – On Value Added Tax;
- 5) excise duty – On Excise Duty;
- 6) Customs duty – Customs Law and other laws and regulations applicable to customs matters;
- 7) Natural resources tax – On Natural Resources Tax;
- 8) Lottery and gambling tax – On Lottery and Gambling Fees and Tax;
- 9) State social insurance mandatory contributions – On State Social Insurance;
- 10) Passenger car and motorbike tax – On Passenger car and Motorbike Tax;
- 11) Electricity tax – Electricity Tax Law;
- 12) Micro-enterprise tax – Micro-Enterprise Tax Law;
- 13) Vehicle operation tax – Law On the Vehicle Operation Tax and Company Car Tax;
- 14) Company car tax – Law On the Vehicle Operation Tax and Company Car Tax;
- 15) Subsidised electricity tax – Law On the Subsidised Electricity Tax.

Out of the abovementioned taxes the following taxes were adopted and came into force during the research period: subsidised electricity tax (01.01.2014.), company car tax (01.01.2011.), vehicle operation tax (01.01.2011.), micro-enterprise tax (01.09.2010.), as well as value added tax with its latest amendments (01.01.2013.).

Income taxes and State social insurance mandatory contributions that small businesses are mainly subject to as well as the changes made in the application of these taxes during the period 2010–2014 is further analysed in the research.

Table 3

Types of taxes and number of changes made 2010–2014

No.	Type of tax	Number of changes
1	Personal income tax	18
2	Enterprise income tax	12
3	Micro-enterprise tax	3
4	State social insurance mandatory contributions	10

The Table 3 points out a serious problem in the Latvian business environment related to the frequent changes in taxation and it is not at all easy to follow these changes and evaluate their long term impact on the business environment. The personal income tax has been changed most frequently during the research period. For example, six of the abovementioned changes were made in 2011 and three changes per were made in the other years. Frequent tax rate changes reflect

indiscriminate tax application policy as well as the fact that such changes were not discussed in the society and the taxpayers' opinions and in most cases the explanations and opinions of entrepreneurs on the impact of these changes on specific business spheres and enterprises were not listened to. The Foreign Investors Council in its report in 2015 "The Investment Climate in Latvia: The Viewpoints of Foreign Investors" also emphasised the abovementioned problems and pointed out that it was one of the essential reasons why foreign investors from Baltic Countries did not wish to invest in Latvia. Simultaneously problems were faced by tax administrators in carrying out supervisory measures for enterprises during the previous period.

Taking into account the inconsistent nature of taxation normative enactments despite the recent practice in Latvia of determining a transitional period for amendments to come into force, changes in tax legislation although often not symbolic pose new challenges for small businesses as it is not always possible to foresee all the practical tax application circumstances during the process of drafting of these normative enactments. Not only the financial indicators achieved but also the possible direction of forecasts is important for each small businesses entity.

Specific tax changes during the research period will be evaluated further in the research paper. Personal income tax (IIN) is calculated and paid on three types of income:

- income from labour relations,
- income from economic activity,
- other income not related to labour relations and economic activity (income from capital, income from capital gains etc.).

Table 4

IIN tax rates (%) from 2009–2015

Year	2009	2010	2011	2012	2013	2014	2015
Income from labour relations	23	26	25	25	24	24	23
Income from economic activity	15	26	25	25	24	24	23
Income from capital	-	10	10	10	10	10	10
Income from capital gains	-	15	15	15	15	15	15

As can be seen from table 4, after the crisis period (2010) there was a significant increase in tax rates for natural persons – for performers of economic activity by 11% and for salaries by 3% compared to 2009. On the whole evaluating the changes in the tax rates applied after the crisis period it should be mentioned that it is unfavourable for small as well as medium businesses, but in 2015 the tax rate was again steadily reduced to 23%. Personal income tax has a direct impact on self-employed persons whose income is considered to be the difference between revenues and expenditures. Natural persons – performers of economic activity are in very disadvantaged competitive circumstances in comparison with small enterprises which pay an enterprise income tax of 15% from their profit. SIA as a

legal entity does not pay any personal income tax, which are only withheld from the employees' salaries.

A significant benefit for micro businesses is the introduction of patent fees for certain economic spheres from the 1st January 2010, which is a state set unified fixed fee (from 43 EUR to 100 EUR per month), that includes personal income tax and state social insurance mandatory contributions for natural persons performing economic activities. The patent fee was introduced with the aim of facilitating tax administration and accounting procedures for small taxpayers and stimulate micro entrepreneurs to start their business with small costs thereby creating the opportunity to develop one's knowledge and skills through professional activity. According to data in the figure 2 it could be argued that the possibility of application of patent fees for economic activity has not gained sufficient publicity.

From the 1st January 2010 till 1st December 2014 the State Revenue Service (VID) has approved 1.8 thousand registrations for patent fees and during this period the average number of patent fee payers per month was 353 persons. (Report on Latvian economic development December 2014, 2015)

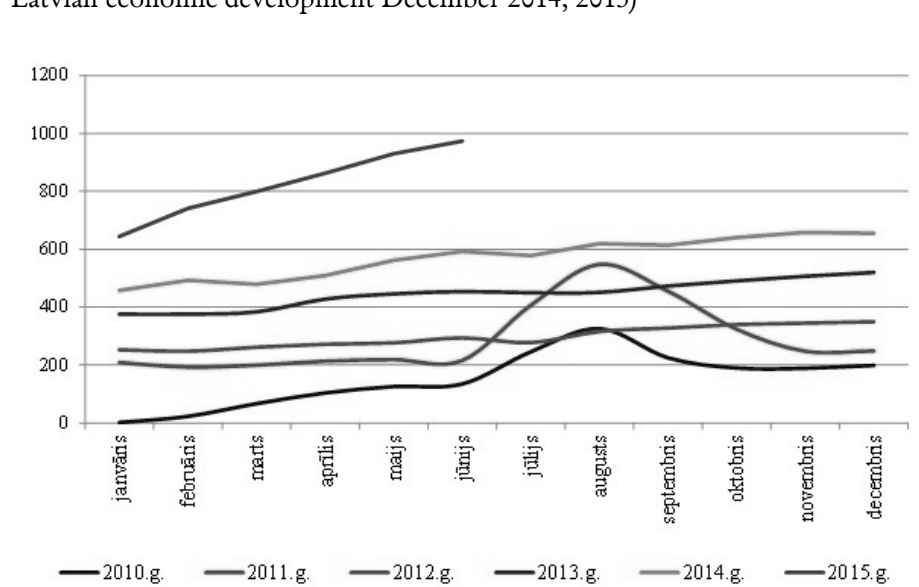


Fig. 2. Number of patent fee payers from 1st January 2010 to 1st June 2015 (On progress and results of practical application of micro-enterprise tax as well as social guarantees for small performers of economic activity, 2015)

Analysing the total number of months the patent fee was paid by each person in Figure 2, it can be seen that the majority of persons paid patent fees for only one month. Reviewing the security of patent fee payers in case of social risks it could be concluded that these persons are subject only to pensions and invalidity insurances. Taking into account the above mentioned it could be concluded that

patent fee payments only entitle payers to social benefits in the future and the calculated scope of services does not always cover the amount of services awarded to person. (On progress and results of practical application of micro-enterprise tax as well as social guarantees for small performers of economic activity, 2015)

In contrast to the abovementioned taxes the enterprise income tax (UIN) rate has remained unchanged at 15% from 2004, but at the same time the tax discount of 20% for small enterprises was abolished. During the research period the following tax discounts were applicable for small enterprises:

- taxpayers who perform agricultural activity a tax discount of 14.23 euro per taxation year is applicable on every hectare of agricultural land used,
- taxpayers can reduce taxes to the tune of 85% of donations, the total tax discount shall not exceed 20% of the tax sum payable. (On enterprise income tax, 1995)

The Saeima’s tax policy subcommittee meeting in February 2015 on further development of UIN put forward a proposal to evaluate the possibility of not applying tax on profits reinvested in Latvia which could further small entrepreneurship as these enterprises find it difficult to get bank loans. The Director of the direct tax department of the Ministry of Finance Astra Kaļāne reminded that on the whole there are 20 tax incentives and several can be applied simultaneously as a result of which the effective tax rate could be 6.4% which is the fourth lowest in the European Union according to EUROSTAT data. Of course a part of these discounts are applicable for small businesses as well, e.g. depreciation of fixed assets and increasing the value of the depreciation of new production technological equipment calculated according to section 13 of the UIN.

The most significant UIN taxpayers within the framework of the research are SIAs but it is difficult to precisely evaluate the revenue and losses regarding application of this tax because precise information about UIN payments of small businesses are not accessible. Information provided by VID shows that the overall UIN payment plan for 2014 was fulfilled to the extent of 87.8%. (Summary of performance of budget revenues for 12 months of 2014, 2015)

The next tax that is reviewed is the state social insurance mandatory contributions (VSAOI), which are essential part of the payments for small businesses. The abovementioned payments are calculated and withheld in case of labour relations but are paid by self-employed persons from their own income.

Table 5

VSAOI rates (%) from 2010 to 2015

Year	2010	2011	2012	2013	2014	2015
Employees insured against all kinds of social risks	33.09	35.09	35.09	35.09	34.09	34.09
Employer	24.09	24.09	24.09	24.09	23.59	23.59
Employee	9	11	11	11	10.5	10.5
Self-employed person	28.17	31.52	32.46	32.17	31.06	30.58

During the research period VSAOI rates experienced a considerable increase in 2011 compared to 2010 by 2% and only decreased by 1% in 2014. Therefore it could be concluded that social insurance payments for small businesses increased taking into account the fact that the minimum wages in the country for the same period increased by 56%. These payments are obligatory for self-employed persons who must calculate and make these payments for those months when their income reached the minimum wages level set by the state. For example in 2014 the payment amount was 298.18 EUR for one quarter and in 2015 the payment amount for one quarter was 330.26 EUR. It is the disproportionate nature of VSAOI payments that motivate small businesses to choose the micro enterprise tax option instead.

A significant benefit for micro businesses under the Latvian fiscal policy is the micro-enterprise tax (MUN), the main aim of which is to stimulate the development of entrepreneurship in the country in the post crisis period.

In accordance with the section 1 of the law on micro enterprises it includes:

- mandatory State social insurance contributions, personal income tax, business risk fee for micro-enterprise employees;
- corporate income tax, if a micro-enterprise complies with the features of a corporate income tax payer;
- personal income tax of a micro-enterprise owner for the income part of economic activities of the micro-enterprise. (Micro-enterprise tax Law, 2010)

Although the section 4 of the “Law on taxes and Duties” states that the income tax system includes personal income tax and corporate income tax based on the above mentioned it could also include micro-enterprise tax.

Micro-enterprise tax is paid on the turnover (double entry system) or on revenues (single entry system) and the rates have not changed during the research period. It is 9%. The tax rate was changed at the beginning of 2015 by increasing it to 11% but taking into account the fact that at the moment of its adoption as of 27.11.2013 the changes were not discussed enough in the public space, active discussions were started between entrepreneurs and the legislators at the beginning of 2015. This in turn led to an untypical situation that the changes were not applied in practice and the rates were changed back to 9%.

While drafting the Latvian budget for 2016 heightened attention was paid to Micro – enterprise tax. A list of 37 sectors were adopted in October 2015 wherein it was not allowed to apply the micro-enterprise tax. The list was prepared by Ministry of Finance which took into consideration the following 4 criteria:

- 1) failure to comply with interest of the society in the area of social guarantees as there is a high risk of injury and the scope of social services available to employees in these sectors is less extensive than for those employees for which standard taxes are paid;
- 2) a high risk of misuse of the Microenterprise tax-payer's status for tax planning purposes, that is, to avoid paying taxes to the state budget;

- 3) high revenue potential in the field and high level of knowledge and qualification is required;
- 4) the society's interests are not taken into account regarding provision of fair competition.

There is great opposition and a variety of objections to such a list of fields from many business organisations as this especially severe new regulations concerns small enterprises in spheres where there are comparatively few customers and it is not usually possible to get big revenues.

Table 6

Micro-enterprise taxpayers 2010–2014

Forms of economic activities of Taxpayers	No. of micro-enterprise taxpayers as of				
	01.01.11.	01.01.12.	01.01.2013.	01.01.14.	01.01.2015.
Individual merchant	518	1 015	1 284	1 491	1 680
Individual enterprises, agricultural farms	187	249	256	257	279
SIA	4 423	11 900	17 080	21 696	26 000
Performers of economic activity registered with VID	2 071	4 665	6 562	8 561	13 289
<i>Total</i>	<i>7 199</i>	<i>17 829</i>	<i>25 182</i>	<i>32 005</i>	<i>41 248</i>

It can be seen from the Table 6 data that the number of such taxpayers has been increasing rapidly in two forms of taxpayers: SIA and performers of economic activity registered with VID. For example in 2012 the number of SIAs that were micro-enterprise taxpayers increased by 43%, and in 2013 by 27%. As of 1st January 2015 the number of such MUN taxpayers stood at 41248. The total number of taxpayers in comparison with the previous period increased most rapidly in 2012 – by 32%, then in 2013 by 27%, in 2014 – by 29% and in 2015 – by 29%. According to VID data 11163 taxpayers lost their MUN taxpayer status during the period September 2010 – September 2014 as they failed to comply with one of the prerequisites of the Micro-enterprise tax law. MUN payments into the state budget in 2014 comprised 51071.3 thousand EUR.

Micro enterprise taxpayers must be considered as serious employers as according to the declarations submitted during the first quarter of 2014, they provided employment for 66 765 employees with an average salary of 438.70 EUR. A positive argument in favour of micro enterprise tax is the fact that there are no “under the table” salaries in those enterprises. Social contributions form a small part of the total tax paid for employees for whom micro enterprise tax is paid – 65%. According to Ministry of Welfare data social contributions on average for one employee for the 1st quarter of 2015 was 109.13 EUR per month, but from the general tax regime the minimum was 360 EUR. (On progress and results of

practical application of micro-enterprise tax as well as social guarantees for small performers of economic activity, 2015)

The above aspect is often emphasised in public debates as the greatest disadvantage of this type of tax. The other counterargument for the renewal of 9% tax rate is that according to VID data 69% of all enterprises that are micro enterprise taxpayers are located in Riga and there are no grounds to consider that the tax will reduce regional disparity.

Conclusions

- 1) The significance of small enterprises to the Latvian national economy determines the necessity for analysis and scientific research to develop taxation policies appropriate for the functioning of these enterprises.
- 2) Out of all tax policy enhancement measures carried out for small businesses the implementation of micro enterprise tax and differentiated personal income tax rates for performers of economic activities should be considered the most positive ones.
- 3) Changes in the business environment in the post-crisis period, which are unfavourable to small businesses are not always taken into account while enhancing taxation policies.
- 4) Natural persons – performers of economic activity are in unfair competitive circumstances in comparison with other small businesses.
- 5) Almost all self-employed persons (around 85%–90%) choose to pay social insurance contributions from the minimum amount of 360 EUR.
- 6) Persons for whom taxes are paid using the micro enterprise tax regime have less scope of social services available than those employees for whom standard taxes are paid.
- 7) Micro enterprise employees get higher income in comparison with those employed in general enterprises as their gross and net income do not differ.
- 8) Although patent payers have restrictions regarding the scope of their economic activity they have simpler accounting procedures and tax calculations. However such a form of income tax is used by a small set of entrepreneurs.
- 9) Frequent tax changes are not coordinated with taxpayers who lack awareness and understanding of these changes.
- 10) During the research period 2010–2014 altogether 43 amendments were made to the normative enactments (laws).
- 11) The approach opposite to the traditional one is common practice in Latvia when taxation changes are first introduced and then public discussions are started which often lead to these changes being repealed.

- 12) The coordination of interests of the taxpayers and the tax administrators in a timely and reasoned manner is a necessary prerequisite for development of the taxation policy in the future.

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PAINTING IN/AND MOTION PICTURE: TRANSLATORIAL PITFALLS IN JAMES JOYCE'S ULYSSES

Tünde Péterfy, BA

Sapientia Hungarian University, Faculty of Economic and Human Sciences,
Miercurea Ciuc, Romania

Abstract

The aim of this paper is to list and present specific narratological techniques and other linguistic characteristics of James Joyce's novel Ulysses. Recurring to these techniques is what makes Joyce scholars deem the novel untranslatable, or translatable only at the price of an immense and inevitable loss that deprives those reading Ulysses in translation of many occasions of experiencing such epiphanies as the original text allows. It deals with the difficulties a translator inevitably faces – regardless of the given target language – when trying to transpose the original text into his native language; it also presents some aspects of Joyce's idiosyncratic ways of dealing with language, such as his 'cross-linguistic vocabulary', the rich variety in style, mood, perspective and register, the abundance of marked and unmarked quotations, internal and external allusions, literal allusions, etc.

This presentation will be followed by our assertion that in spite of these seemingly unsurmountable difficulties, Ulysses can and should be translated: the novel itself suggests that difficulties and challenges are to be met with and not to be avoided.

Keywords: Ulysses, translational difficulties, texture, narratological techniques

Introduction

This paper focuses on, gives examples for and analyses specific narratological techniques and other textual characteristics in James Joyce's novel entitled Ulysses, which all contribute to the creation of a text that raises huge difficulties for those brave translators who dare to transpose it into another language.

These techniques are as follows: internal translations in the text, rich variety in style, using motifs (characters, ideas, names, etc.) from earlier Joycean texts, applying literal coincidences in a hyper-conscious way, intentional errors and mistakes, covert intertextual allusions, incorrect grammar and 'shortmind' within interior monologues.

The categorization and a thorough presentation of these sources of difficulties will be followed by our assertion that, in spite of these seemingly unsurmountable

difficulties, *Ulysses* can and should be translated because, on the one hand, every translation – being in itself an interpretation as well – reveals something new about the original; on the other hand, the novel itself suggests – through Bloom’s character, who, in spite of the marital conflict they experience, does not give up on his wife – that difficulties and challenges are to be met with and not to be avoided.

Furthermore, reading the translation which is inevitably defective is, after all, a better solution for non-native readers than not being able to read it at all. Translations of *Ulysses* have been received with enthusiasm in all the language communities, which proves that the features of the novel that could be saved and transposed into other languages still have a great deal of pleasure and satisfaction to offer.

Method

James Joyce was in his thirties when he wrote *Ulysses*. This erudite writer who knew several languages spent seven years writing the novel, sometimes working for days on the ‘burnishing’ of just one phrase. He selected the words, together with all their nuances and shades with much care for them to serve a multitude of purposes. As a result, the novel contains many well-hidden linking elements, or allusions to Irish literature and history, parodies of different literary styles and authors so deeply integrated into the English language that, even if the translator understands their meaning and purpose, he is often incapable to “recreate the intellectual, aesthetical and emotional impressions the author wanted to convey to his reader.” (Boisen, 1967, 166)

The following presentation of the manifold difficulties the text of *Ulysses* raises for translators is based on several publications on the subject by Fritz Senn. Fritz Senn is a widely known James Joyce scholar, a central and representative figure of the field. Since 1985 he has been in charge of the Zürich James Joyce Foundation and has published several studies on Joyce and translation. He is, by his own admission, a “far-fetcher by constitution” (Mihálycsa and Wawrzycka, 2012, 205) who searches for hidden connections between elements of the text by paying hyper-close attention to the texture of Joyce’s language.

As he states in one of his articles on the subject (Senn, 2010, 6) all results of translation “reflect their cultural background, the potentialities and confines of the language the translations are written in.” In addition, they also represent the translators’ own interpretations of the text. These factors all include the danger of distancing the translation from the original text which is in contrast with the purpose of being true to the original.

He also points out that, in the case of literary texts, language is used in a subtle and sophisticated manner; adding to this the fact that with Joyce form and content become one. Thus, *Ulysses* is labelled a borderline case regarding translatability because of this ‘expressive form’, that is, meaning is so strongly embedded into the form of the English language (e.g. the words’ formal or acoustic features) that

it hardly enables reproduction in other languages. For example, in the case of Molly Bloom's comment on the name of a real author when she tells her husband what kind of book to bring her next: "Get another of Paul de Kock's. Nice name he has." (U, 78) – if the translator decides to leave the name unchanged, which would be a reasonable decision on his part, as it is the real name of an actual author who might be known by this name, then the 'nicety' of it will probably be incomprehensible for the non-English speaking reader, as long as the name does not activate – by its acoustic similarity to the pejorative word 'cock' – the same notion and reverberation in the readers of other languages. This small detail may seem to have no particular importance; however, *Ulysses* is built not on a complex and rich plot, but on the abundance of such verbal coincidences which create its special style and atmosphere.

Furthermore, the novel is not only built on language, but is highly concerned with it; the characters use certain words in a conscious and deliberate way. For example, an even more sophisticated game with language is presented by Senn (2010, 14), a playful comment on an oddity of English spelling made by Bloom, when thinking about food: "Do ptake some ptarmigan." (U, 223) The spelling peculiarity of the word 'ptarmigan' is mocked at by repeating the 'pt' combination adding an extra 'p' to the word starting with 't' (take). This implicit and playful comment on the strangeness of English spelling can hardly be transposed into another language.

Henceforward we will try to categorize the manifold characteristics of the novel that may raise difficulties for translators in their work. Before dealing with the hardships that only the most recent translations have had the opportunity to deal with – that of the ungrammaticality of the interior monologue – first we shall make an inventory of the other possible translational pitfalls one must avoid.

Internal translations in the text

The text of *Ulysses* often causes difficulties in understanding even for the English speaking reader because of recurring to the remote layers of English (e.g. Dublin slang), implanting foreignized elements into the text (Latinate words, for example) or inserting words or shorter passages in other languages (Greek, Latin, Italian, French, German, Jewish, Hungarian, etc.), thus transforming the process of reading into a translational process with a delayed understanding even for the sophisticated native reader.

Here are some examples of passages in foreign languages: "Introibo ad altare Dei." (U, 1) – which is the opening line of old Latin mass parodied by Mulligan; "Qui vous a mis dans cette fichue position? C'est le pigeon, Joseph" (U, 51) – here Stephen quotes from a French book and refers to Joseph, the father of Jesus; "*Shema Israel Adonai Elabenu.*" (U, 155, emphasis in the original) – Bloom, who is of Jewish origin, remembers his father reading Hebrew books backwards and

recalls this short line about the Lord, etc. There are countless other insertions of passages in foreign languages; the text abounds in them all through the novel. Joyce's characters, especially the highly educated Stephen, are familiar with several foreign languages just like the author himself, and they do not hold themselves back in using them.

The Ithaca chapter in particular abounds in Latinate words that often have to be back-translated into the common and more familiar form of English (Mihálycsa and Wawrzycka, 2012, 207). For example, the following word of Latin origin: "duumvirate" (U, 776) requires a certain richness of vocabulary in order to understand its meaning, and then the capacity to identify it as a humorous metaphor used for Stephen and Bloom (as it obviously does not refer to any ancient Roman city official here).

Another example for the use of Latinate words in the text is: "the latration of illegitimate unlicensed vagabond dogs" (U, 855), or "vespertinal perambulation" (U, 841). By exploiting the possibilities offered by this double vocabulary of English, even the native English speaker has to carry out an act of translation to decode the meaning, an act of recognition with a short delay in understanding. Since this double vocabulary of English (Latinate synonyms of common English words) is a characteristic that most of other European languages lack, the possibility of the original text to cause a delayed understanding (an ulterior 'aha' moment) unfortunately gets lost in translation.

Variety of style

Ulysses follows on the steps of *A Portrait of the Artist as a Young Man* not just by having a common protagonist in the person of Stephen Dedalus, but by manifesting the same variety and gradation in language style, only in a much more complex manner. The reader experiences a rich variety of moods, perspectives, styles and linguistic features characteristic for each chapter, and a variety of register from Hiberno-English to colloquial language, to slang, to literary diction, and then parodies (see Mihálycsa and Wawrzycka, 2012, 207).

The first edition of the novel did not offer any help for the reader in understanding it. It contained no preface or epilogue, the chapters had neither titles nor numbers. However, Joyce drew two charts – the Gilbert and Linati schemes – which do offer some kind of map to the novel's structure. These tables identify the title of each chapter and contain information on the scene, the date (in hours), the dominant techniques, etc.

In the following chapters we shall present the narratological techniques and linguistic styles of each chapter based on the literary analysis of András Kappanyos (Kappanyos, 2011) in order to illustrate the novel's linguistic variety and richness. This linguistic characteristic of the novel requires that the translator should be as

much of a linguistic virtuoso as Joyce was in order to successfully recreate this richness and variety in his own language.

The first chapter entitled Telemachus is a 'young narrative', as Joyce calls it. It is built mainly on traditional third person narration with the occasional insertion of interior monologues. The name is meant only to make a structural connection between the first chapter of Stephen and that of Bloom (fourth chapter: 'mature narrative'), and later on with the sixteenth chapter ('old narrative').

The second chapter called Nestor is built on 'personal catechism'. The word originally refers to the organization of a certain knowledge (mostly religious) in a question-answer form. In this chapter Stephen asks questions from his students, then later on he is the one questioned by Mr. Deasy, the schoolmaster, Stephen's boss. Again, this chapter is put in parallel with the seventeenth (the penultimate one) which is also entitled 'catechism'; however, while the latter is actually written in question-answer form, this second chapter is the traditional narration of the question-answer type of situations.

The third chapter bears the title Proteus and, according to Joyce's scheme, it is a 'male monologue' put in parallel with the last chapter which is a 'female monologue'. Again, this third chapter is not a proper monologue like the last one, but a narration alternating between exterior and interior viewpoints interwoven by the interior monologues of Stephen.

Chapter four is entitled Calypso, and this is where the other main character, Leopold Bloom appears for the first time. The time turns back to that of the first chapter, it is a 'mature narration' of Bloom's morning episode.

Joyce identifies the technique of the fifth chapter, called Lotus-eaters, as 'narcissism' which refers to the chapter's thematic aspect rather than to its style. The narrative technique here is again third person narration interwoven with interior monologues, in this case, with that of Leopold Bloom.

The Hades chapter recurs to the technique of 'incubism'. Once again, this term does not refer to a stylistic or rhetorical characteristic of the text, but rather to its thematic aspect. From a narratological perspective, this chapter is based on exterior narration, including dialogues recorded without commentaries and Bloom's interior reflections that gradually fuse with the exterior narration, making the reader – and the translator – wonder which impression is the narrator's own and which is filtered through Bloom's mind. We can observe that, just like the linguistic style in *A Portrait of the Artist as a Young Man*, the narratological techniques here become more and more complex as the text progresses.

The seventh chapter, Aeolus, is 'enthymemic'. The term 'enthymeme' belongs to the field of rhetoric, and it means an informally stated syllogism in which one of the premises is missing because it is assumed. This chapter is full of such rhetorical procedures, recalled or produced on the spot, many of them related to information known only to journalists. It contains 63 short articles with titles, thus the style corresponds with the scene which is an editorial office. Nevertheless, this chapter

is a continuous narration; those short articles do not constitute real structural units inside the chapter. Furthermore, this is the chapter where both Stephen and Bloom are present, even though they do not meet yet; and the narrative perspective switches between the two characters.

The eighth chapter entitled *Lestrygonians* is called 'peristaltic' by the author, referring to the digestive system. The term suggests, once again, the topic of the chapter rather than its technique: the reader follows Leopold Bloom's stream of consciousness at lunchtime, even during his conversations with other characters.

The *Scylla and Charybdis* chapter is dialectic, the scene being that of the library. We perceive everything through Stephen's artistic mind, thus the text takes different artistic forms: dramatic dialogue, blank verse, etc. It also includes numerous unmarked quotations from Shakespeare and references to contemporary Irish literature. Beside being artistic, at this point Stephen's mind is also under the influence of alcohol: it produces several puns and jokes out of the names and behaviour of his debating partners.

Joyce calls the technique of the next chapter, *Wondering Rocks*, a 'labyrinth' and this chapter is indeed a textual labyrinth built on a well-constructed matrix of 19 episodes and a multitude of characters: each episode follows the movement and actions of a certain person or group. Elements from the different episodes are occasionally linked to, or cross each other. This chapter often resorts to cinematic techniques, such as presenting in parallel happenings that take place at the same time but in different locations.

One of the most difficult chapters to translate is the *Sirens*: its technique is called by Joyce 'fuga per canonem', that is, fuga according to the rules. This chapter imitates the musical genre of fuga, by using the instrument of language: at the beginning it presents the basic themes that will be developed further in the chapter. The text itself is characterized by strong musicality created by the abundance of onomatopoeic words, frequent use of alliteration, rhythmic schemes, repetitions, etc. It starts with the sentence: "Bronze by gold heard the hoofirons, steelyrining Imperthnthn thnthnthn." (U, 328) – where 'bronze by gold' is one of the waitresses in the Ormond Hotel's bar. The chapter continues with short, sharp, elliptic sentences containing many onomatopoeic words, such as 'jingle', 'notes chirruping', 'clock clacked', 'tup', etc. (U, 329).

The twelfth chapter, *Cyclops*, is called 'gigantic': happenings or objects are exaggerated to such an extent that they become parodies, embedded into the narration of an unknown and unnamed narrator.

The first part of the *Nausicaa* chapter presents the events from the perspective of the young Gerty MacDowell according to her manner of self-expression, that is, in the style of corney sentimental novels. On the other hand, the second half of the chapter shows us Bloom's perspective on the same situation, a much more rational one; and the narrative style is also adjusted to his rational, more prosaic way of expression.

Oxen of the Sun is another chapter that, with its high stylistic complexity raises serious difficulties for translators. Its technique is 'embryonic development', and is based on the fact that the ontogenetic stages of the embryo are in fact the faster and miniature reproductions of the stages of phylogenesis. Joyce creates this chapter on the analogy of the above mentioned scientific fact in the following way: he reproduces in it the historical stages of the development of English prose, imitating different styles in their order of appearance on the historical palette, evoking the particular style of certain authors (John Bunyan, Daniel Defoe, Jonathan Swift, Laurence Sterne, Charles Dickens, etc.), groups of writers or literary periods.

The longest chapter, Circe, is built on the technique of 'hallucination'. It is written in a dramatic form, consisting of names, dialogues, monologues and stage directions. Elements of reality mingle with those of the imagination or hallucination and there is nothing to indicate the boundary between them. Realistic time expands here into cosmic dimensions.

The sixteenth chapter, Eumaeus, is an 'old narrative', a relatively simple, traditional one compared to the extravaganza of the previous ones; it returns to Bloom's personal style. However, as this time he tries to impress Stephen with his level of sophistication, he often uses foreign – especially Latinate – expressions and, at the same time unfinished, elliptical sentences occur.

The penultimate chapter is called Ithaca, it is built on 'impersonal catechism', and this time the text is, indeed, constructed in the form of questions and answers. Otherwise, from a linguistic point of view, it does not raise any particular obstacles for translators.

The last chapter, Penelope, is a 'female monologue' that requires the reader's – and the translator's – special attention and patience as it contains no punctuation marks whatsoever. It is hard to decide what elements of the text belong to a certain unit of thought, thus almost all of Molly's assertions remain open, unfinished; the reader can, and has to resort to his creative and combinatory power to interpret this last section of the novel. In addition, Molly does not name – most of the time – the subject of her narrative; for example, she uses the same masculine personal pronoun for both Bloom and Boylan.

Recyclings from other Joycean texts

Different Joycean texts 'recycle' each other's previous ideas and characters. In the Telemachus chapter, for example, right at the beginning of the novel, a name of a character appears that can be identified neither by the most attentive reader, nor even in retrospect because he will not appear in *Ulysses* again. The words: "Cranly's arm. His arm." (U, 6) appear in Stephen's thoughts during a conversation with Buck Mulligan, his flat-mate in the Martello Tower and, as one may find out after an investigation into Joyce's earlier works, Cranly is a character

imported from *A Portrait of the Artist as a Young Man*, and belongs to Stephen's past, being an intimate friend of his who just made a hint of a homosexual pass at the end of the book. That is the reason why the utterance of Mulligan: "God, Kinch, if you and I could only work together we might do something for the island. Hellenise it." (U, 6) – the last sentence in particular, reminds Stephen of Greek love rather than Greek art, and then activates the memory of Cranly in his mind (Seidel, 2002, 86–87). Joyce practically expects the reader not just to be hyper-attentive to every word in his novel, but also to be acquainted with his earlier works as well; for, he recycles both characters (Stephen and Cranly) through all of his books, from *Dubliners* to *Finnegans Wake*. As Fritz Senn puts it, in this sense Joyce is rather arrogant and unduly demanding (Mihálycsa & Wawrzycka, 2012, 208).

Translators must be even more attentive to these re-appearing characters and themes in order not to commit an accidental shift of the themes, for example, and to remain consistent with the translations of Joyce's earlier works to the given language.

Literal coincidences

Coincidences appear in many novels on many occasions. One major basis of Joyce's techniques, however, is literal coincidence: words, expressions, advertisements, slogans, parts of a song, etc. are repeated throughout the text, or reappear in a slightly modified way, becoming important linking elements between motifs or thematic lines. If not recognized by the translator, these links can easily get broken, thus depriving the reader of important mnemotechnics that could help him put the separate pieces together.

A literal coincidence, one that fortunately has only a local effect, is Bloom's Freudian slip when having a conversation about the deceased Dignam's insurance and his widower, saying "the wife's admirers" (U, 405) instead of 'the wife's advisers'. This slip of the tongue is due to the phonetic proximity of the words 'advisers' and 'admirers' and, also to the fact that Bloom's wife is about to have an affair with her agent, Boylan that very day, and he is probably thinking about that personal issue at the moment. The translator has, again, the difficulty of reproducing such a slip of the tongue in the target language while the denotative meaning of the words should remain similar. Obviously, one cannot have both ways, so a choice has to be made about the importance of each parameter. A straightforward, correct translation of the words' meaning necessarily deprives the passage of its function (in this case, the logical cause of the Freudian slip, that of phonetic similarity); but, if the translator resorts to an artifice and introduces a different pair of words that are acoustically similar, the formal parameter may be preserved but distortions of other nature may occur (Senn, 2010, 33), shifts in thematic reverberations, for example.

Let us now examine a literal coincidence that is, in addition, a very important linking element in the novel: Leopold Bloom has a brief encounter with Bantam Lyons on the street. The latter asks for the newspaper to look up a French horse in it that is to run that day, but it seems to take him a while to find the section. Bloom wants to get rid of him as fast as he can, so he says to Lyons that he can keep the newspaper, and then continues: "I was just going to *throw it away*, Mr. Bloom said." (U, 106) [italicized by me, T. P.]. Accidentally, Bloom's way of formulating the sentence chimes with the name of a starter horse, *Throwaway*. Bantam Lyons takes his words as a tip for the winning horse. This misinterpretation will have, in a later chapter, an important role in understanding why Bloom is accused of avarice: of having won a large sum of money on the horse and still not inviting his companions for a drink.

Motifs such as 'home' and 'key', or 'womb' are ones that run through the whole novel; they are words loaded with "heavy thematic burdens" (Senn, 2010, 25). The latter, for example, occurs about twenty times in the text: as a metaphor in Stephen's chain of association from midwives via navel cords to Eve and to the "Womb of sin." (U, 46); then he continues: "Wombed in sin darkness I was too" (U, 46), where the noun becomes a verb, a morphological transformation most probably impossible to repeat in other languages. The word 'womb' occurs in Bloom's thoughts as well: "womb of warmth" (U, 107), then he returns to it in the Sirens chapter: "Because their wombs. A liquid womb of woman eyeball gazed under a fence of lashes, calmly, hearing." (U, 369). Furthermore, the Oxen of the Sun chapter – which takes place in a hospital where Mrs. Purefoy is about to deliver her child – is thematically dominated by this organ. In each of the passages the word 'womb' appears, it has different roles and connotations. The translator's dilemma might be whether to stick to one correspondent throughout the whole text for the sake of unity (and whether the target language's structure allows this to him) or to adjust it to the optimal effect of each passage in which it occurs, making much harder for the reader to identify the thematic interconnections among the distanced passages.

If taken literally, a figure of speech, besides its usual meaning, can have an ironical overtone. Senn gives the example of Bloom's advice to Stephen after they finally meet and Bloom can finally take Stephen under his fatherly wings (Senn, 2010, 26): "I wouldn't personally repose much trust in that boon companion of yours who contributes the humorous element, Dr Mulligan, as a guide, philosopher, and friend, if I were in your shoes" (U, 714). The irony of his remark is the fact that Stephen happens to be wearing the very shoes that have been given to him by the same Mulligan he is warned against; a fact unknown to Bloom and, only known by the reader if he had paid close attention to the happenings and conversations between Stephen and Buck Mulligan at the beginning of the novel. This kind of coincidence, first of all has to be observed, but even if observed, there is little chance that another language can reproduce an expression that has the same meaning and, at the same time, contains the word 'shoes'.

Joyce's characters share with the author the inclination towards using such literal coincidences in their conversations so that they seem to be in cahoots with the author in creating riddles, ambiguities, puzzles and other verbal challenges for the reader's memory and for the translator's creativity, regardless of them being witty or not. Lenehan is a punster of the latter category who, upon hearing a few lines from an opera entitled "The Rose of Castille", produces the following joke: "What opera is like a railway line? [...] *The Rose of Castille*. See the wheeze? Rows of cast steel. Gee!" (U, 170). Again, this word-play built on phonetic similarity is one of many whose neglect in translation would not be in itself an enormous loss, if it had not been integrated so deeply into the texture of the novel (see Senn, 2010, 35). The opera in question is a recurrent motif in the Sirens chapter where its title appears several times, and there are allusions to the riddle itself in later chapters of the novel, not to mention that the rose of Castille motif is strongly associated with Molly, Bloom's wife, who has Spanish origins. Its importance is proven by the fact that most translations leave the riddle intact, keeping the title of the opera unchanged even at the cost of destroying the phonetic relation between the words and thus, the riddle's logic. Should the title of the opera be changed, it could not be connected to the sounds of that particular aria heard before by the participants, in which case the reader would not understand how the idea of the riddle came to Lenehan's mind. On the other hand, the 'railway line' element of the riddle is also important as, once all these elements were associated with one another through the riddle, later on one of them is meant to evoke the whole riddle on its own, then the title of the opera, the rose, and through the rose, even Bloom himself is drawn into this chain of associations at one point, thanks to his family name.

As emphasized by the former examples, no translation can keep all the elements of the original, as no other language can give the same combinatory possibilities as English has; therefore, an order of priorities must be set up by the translator regarding the elements that necessarily need to be preserved and the ones that may be ignored. The accumulated interpretative studies on the important connective motifs and themes are a huge help for translators in this selective process.

As we have seen earlier, each chapter in *Ulysses* has an idiosyncratic style; nevertheless, these chapters are connected by a network of recurring motifs, echoes, links and cross-references, the novel thus becoming a huge hypertext through the means of literal coincidences, a web of small, interconnected verbal units. After translation the result will necessarily be much less tightly woven (Mihálycsa and Wawrzycka, 2012, 219).

Intentional errors and mistakes

A linguistic phenomenon similar to that of literal coincidence is the set of errors and cases of typo – all deliberately made by the author – that constitute a creative challenge for translators in inventing analogous forms in the target language;

errors like lapses, aural/semantic slippage, defects, misquotes, etc. (see Senn, F., Mihálycsa E & Wawrzycka J. (Eds.), 2012, 165). As we have pointed out before, this 'co-opting of chance and error' becomes a principle of composition, consequently not neglectable by translators. They must strive to recreate for the non-English speaking readers similar occasions for such 'portals of discovery' that the original text allows. These errors also fulfil a structural function inside the texture of the novel contributing to its indeterminate aspect and to the lateral proliferation of its meaning.

In the early editions of the novel these errors – the authorial intention behind them not yet recognized – were often corrected by the editors and only restored by the Gabler edition of *Ulysses* in 1984. Furthermore, early translators assumed that any error in the translated text would be considered as transmissional error and attributed to their work and not to the author of the original. However, the newer generation of translators is aided by the continuously increasing critical studies, hence being much more aware of the importance of these Joycean anomalies and, as a result, they demonstrate a much stronger attempt to recreate them in their translation. Most of these errors are echoed throughout the novel requiring a 'nodal translational practice'. (*idem*, 166)

The following example is deemed as one of the most important lapses, exploited through multiple echoes in the text. In the Lotus Eaters chapter Leopold Bloom is reading the secret letter he has received from the typist Martha Clifford, which contains a suggestive typo: "I called you naughty boy because I do not like that other *world*. Please tell me what is the real meaning of that word." [italicized by me] (U, 95). The spelling mistake of 'world' instead of 'word' in the first sentence will later recur in Bloom's interior monologues in relation to his thoughts on life, love and death. Its first echo appears in the Hades chapter where, after Dignam's funeral Bloom is contemplating about death and the 'other world': "There is another world after death named hell. I do not like that other world she wrote. No more do I. Plenty to see and hear and feel yet." (U, 146). This is a direct allusion on the part of Bloom to the error Martha made in her letter ("she wrote"). Translations into languages that do not have a paronymous pair of words for 'world' and 'word' – which is true for almost all the other languages – will necessarily correct Martha's typo or take an opportunistic turn and reproduce it with some other slip offered by the target language which will, unfortunately, add a different semantic reverberation to the text (*idem*, 167). If this specific antecedent 'world-word' slip gets lost from the letter in the course of translation (either its denotative meaning or its paronymic aspect), there is no way the reader can understand why, further in the novel Martha's sentence is referred to by Bloom when thinking about death and hell. And, in a novel where there are so many aspects raising difficulties in understanding even for the English reader, translators must strive to preserve those connecting elements that are meant to help readers to put the pieces together.

Covert intertextual allusions

Another form of literal coincidence is when a phrase or a sentence is either taken literally from a piece of work (most frequently from the Bible or a Shakespearean work) or from some kind of religious ceremony without the identification of the source. They can also appear with a little modification, containing only elements that perhaps, in the author's estimate should be enough for the sophisticated reader to detect the source and understand the surplus that it adds to the meaning. This kind of handling of foreign elements causes translators not only the difficulty of recognizing these intertextual allusions as such, but they also have to take into consideration the possibility that the works cited or alluded to are already translated; and if so, they have to decide whether the translated form does or does not fit into the new context (Senn, 2010, 44).

An example for the case where the phrase or sentence literally coincides with an expression from a particular Christian ceremony is the moment when Leopold Bloom thinks, before his bath: "This is my body." (U, 107). This narcissistic remark is identical with what the Catholic priest utters at Mass (Mihálycsa and Wawrzycka, 2012, 212) and obviously brings together the figure of Bloom with that of Jesus; for what reason, that is a matter of literary interpretation. The translator, nevertheless, must observe these coincidences, and, in this particular case, needs to use the exact expression the given language uses for this particular part of the Catholic ceremony. Another example for a faint allusion to a real character, an English politician, which is ignored by many translators, appears in Stephen's thoughts: "lousy Lucy" (U, 277), who is turned into a woman in a German and a French translation (Senn, 2010, 16), though is said to be referring to Sir Thomas Lucy, a magistrate who is known to have entered into some kind of conflict with Shakespeare. This error of ignorance, or error of facts remains a professional risk for translators of this still obscure novel, *Ulysses*, in spite of the numerous literary analyses that have been done since the novel's first publication and which make the job much easier than it was for early translators.

For the latter case – when only bits of the borrowed foreign text are preserved and which therefore is much more difficult to notice by the translator, Fritz Senn gives the following example: at one point Buck Mulligan refers to Stephen as "the loveliest mummer of them all." (U, 4). Translated to other languages, it is quasi impossible to evoke, through this line, the image of Brutus, who "was the noblest Roman of them all" (Julius Caesar, V, v.68, quoted in Mihálycsa & Wawrzycka, 2012, 212). In the original, this partial literal coincidence makes different situations and times come together: the present time of Stephen and Mulligan with Roman history, and finally, with the Shakespearean stage (through *The Tragedy of Julius Caesar*); these reverberations enrich the Joycean text, a text that builds not on a complex, detailed plot, as we mentioned before, but on this finesse of language which inevitably becomes weaker as these reverberations get lost in translation.

Narrative techniques in *Ulysses*

In the course of presenting the narrative techniques used by Joyce in *Ulysses* I follow the categorization of Seidel (2002, 81–98):

1. Joyce introduces the new and unconventional narrative proceedings gradually, progressively, by giving time to the reader, through a training phase, to find out the way they function before recurring to them exclusively. Accordingly, the novel starts with the traditional narrative technique of '*third-person narration*', where an omniscient, neutral narrator tells the important parameters of the plot: scene, time, characters, physical appearance, objects, etc. This type of narration appears mostly in the first few chapters, but it never disappears totally. The very first sentence, the opening lines of the book are the example of 'good-old' third person narration:

"Stately, plump Buck Mulligan came from the stairhead, bearing a bowl of lather on which a mirror and a razor lay crossed." (U, 1). This type of narration is easy to understand, it contains no occasion for misinterpretation, at least not on a grammatical, literal level. This way the novel sets up the scene, providing readers with the most basic information in a stable, easily comprehensible manner.

2. Whatever sound or noise is made by a character or an object in the novel (dialogues, for example) it is not put between quotation marks but signalled by a long dash (–) and is termed by Seidel as '*sounded narration*':

"– Come up, Kinch. Come up, you fearful jesuit." (U, 1).

Later on Joyce will start experimenting with other ways to signal the coming of a speech, hoping maybe that the readers have already learned to find their way around the text.

3. The most complicated narrative technique used in the novel is the '*interior narration*'; difficult to even recognize at times, and then much more difficult to translate. It mimics the natural, unconscious flow of thoughts, the chain of associative memory. It looks like the record of unspoken, and – in many cases of Bloom's interior monologues – ungrammatical or pre-grammatical shreds of thought, made up of elements from past history, imagination, of accumulated – and often incorrect – knowledge, emotions, motivations, etc. This type of narration is more difficult to comprehend because Joyce succeeds in copying the working of the human mind so perfectly that the result is as illogical, often chaotic, fragmentary, incoherent and inchoative as it is in reality; finally, this technique does not transpose or explain this internal world for the external receiver because that would ruin the impression of authenticity.

Interior narration is often embedded into third-person narration without any specific warning in punctuation. There are, however, other ways to mark this change in the text: in the case of interior monologue the narrative voice usually changes from third person to first person, and verb tense to present; or it

contains some idiosyncratic expressions that help the reader to recognize the proprietor of the interior voice. Seidel identifies an early instance of interior monologue hidden in a description in third person narration:

“Stephen bent forward and peered at the mirror held out to him, cleft by a crooked crack, hair on end. As he and others see *me*. Who chose this face for *me*?” [words italicized by me] (U, 5).

The shift from third person to first person is easily detectable here; this way the reader knows for sure that the narration has turned into interior monologue and, what he is reading, are the character’s inner thoughts.

This technique, developed to a uniquely high level by Joyce, and numerous other aggravating factors cause translators such difficulties that need a vast knowledge and a great deal of creativity to overcome.

Incorrect grammar in interior monologues

Let us take a more detailed look at what these pre-articulations – especially in the case of Leopold Bloom’s interior monologues – are like. In his article entitled “The Lure of Grammatical Rectification” Fritz Senn says about *Ulysses* that it is “polytropically deviant and transgressive” (Senn, 2012, 7), characteristics generated mostly by the use of this specific narrative technique that readily abandons grammaticality for the sake of authenticity, in order to imitate “the immediacy and seeming randomness of intruding impressions and associations before the emerging thought is mentally articulated with syntactic precision” (Senn, 2012, 7) that is, already verbalized but not yet structured. All this is accomplished through such idiosyncratic verbal proceedings as indeterminacy, anomalous word order, lack of punctuation, ellipsis, polysemy, etc. (see: Senn, Mihálycsa & Wawrzycka (eds.), 2012, 133). Translators have a strong normative urge to correct these deviances according to the rules of the target language; punctuation is often inserted for the sake of clarification when none is called for by the original text; thus this sense of immediacy of the original text disappears, the inchoative thoughts are transcribed into neat and correct sentences expressing reasoned reflections. One possible explanation to the tendency of translators to forcefully correct the ungrammaticalities of the original text can be that they suppose that readers of the translations do not give them the benefit of the doubt as readily as to an original work, on the contrary, they attribute all errors to the translators’ lack of command in the target language (see Senn, 2012, 9). But even when a translator consciously tries to preserve this pre-grammatical feature of the original, he has to confront with the restricted possibilities of the target language (e.g. certain syntactic rules or the need for inflections that cannot be totally dismissed, certain word order, compounds, idioms, etc.).

'Shortmind'

Fritz Senn coined the term 'shortmind' upon the analogy with 'shorthand' in writing to refer to the mind's inchoative, pre-formulated grammar, jottings that are not coherent yet (Mihálycsa and Wawrzycka, 2012, 221). Most of the Bloomian interior monologues are a succession of emergent associations, often fragmentary, without a grammatical structure, following the order of intrusion rather than grammatical order, beginning with the first bit of thought that comes to mind – something perceived, thought or remembered. Senn explains that English is well suited for imitating the pre-articulations of the mind because of its rarity of inflections and also because of the frequency of homonyms (especially homophones): many words can be verbs or nouns or adjectives at the same time by having the same form in all cases (eg. hurt, cut, light, etc.). Many of them are only one-syllable-long and easily fit to any pattern. Agglutinative languages, such as Hungarian, does not have this degree of flexibility.

Bloom's thought about another character in the novel, Richard Goulding, whose financial situation had changed for the worse, goes like this: "Now begging letters he sends his son with." (U, 352). This is not exactly the prototype of a grammatically correct sentence. The typical S+V+O word order is subverted here. The line rather follows the order in which the ideas appear rapidly one after the other. The starting point is the present situation, 'now', which induces the word 'begging', then 'begging letters' which are sent by his son. In an articulated, matured form it would sound something like this: 'He now sends his son with begging letters'. However, these words are not uttered, just thought; and thoughts start out before they could have a definite goal or direction toward which to flow.

Another example for shortmind is again in a Bloomian interior monologue; towards the end of the day Bloom is resting on the beach and thinks, after his physical relief at the sight of a young woman, Gerty MacDowel: "O! Exhausted that female has me." (U, 497). Again, the feeling of exhaustion is the starting point of the thought; the cause of this state is looked into only later. If put in a grammatically correct order: 'That female has exhausted me', the sentence becomes a reflection on the situation, while the original succeeds in presenting the inchoative nature of a thought, captured in the moment of being born.

The following examples of 'impact structure' or 'process' sentence, all occurring in Bloomian monologues, selected by Senn to illustrate the phenomenon, reinforce furthermore this rule of priority in structuring sentences (Senn, 2012, 9–10): on one occasion the image of a luminous crucifix enters Bloom's mind and then, a bit later we read his thought about it: "Phosphorus it must be done with." (U, 190), where the sentence's core element is the first word 'phosphorus', which is the solution to Bloom's wondering about the way that crucifix could be made so luminous, while the rest of the sentence is the result of a secondary process of completion.

In *Lestrygonians*, a chapter dominated by food and eating, Bloom thinks about Dilly Dedalus, Stephen's sister: "Good Lord, that poor child's dress is in flitters. Underfed she looks too" (U, 191). Again, the core element, his bewilderment expressed by the word 'underfed' is at the beginning of the sentence, the rest is just a grammatical supplement. Unfortunately, translations tend to 'correct' these 'impact structures' into neat, coherent sentences, transforming them into reflections.

Other cases of shortmind where thoughts 'jostle' upon each other in a seemingly random order constitute a much bigger challenge for translators. Fritz Senn exemplifies this phenomenon once again with a Bloomian interior monologue in which Leopold Bloom recalls a memory of Molly singing: "I turned her music. Full voice of perfume of what perfume does your lilactrees" (U, 355). Now, beside the fact that this sentence has a subverted word order, it seems totally incomprehensible. However, all of its constituents have their subjective reason to be part of the sentence: Bloom remembers the time he first heard Molly sing 'full of voice' which he synaesthetically associates with her smell 'of perfume' which in turn activates in his memory a line from the letter he received that morning from Martha Clifford: "Do tell me what kind of perfume does your wife use." (U, 95). He compares the smell of her perfume with the smell of lilac trees which brings the chain of association back to its starting point. This is a very suggestive example of how, in *Ulysses*, and especially in the Bloomian interior monologues, grammatical rules are totally abandoned and the reader has to find its meaningful chunks and the connections between them by himself. These verbal units are like thought-recordings, as if thought had been transcribed in their incipient forms. Through the process of translation, however, the grammatical rules imposed by the different target languages unfortunately transform these verbal units into much more ordered and more logical sentences, lacking the idiosyncratic deviancy, and thus the authentic sense of immediacy of the original Joycean text. The same happens in the case when Bloom tries to reckon whether it was possible to have been a full moon on the day that another character, Mrs Breen, mentioned: "Wait. The full moon was the night we were Sunday fortnight exactly there is a new moon." (U, 212)

Another kind of 'Bloomian pitfall' for the translator is when he tries to recall a piece of declarative information stored in his memory incorrectly, like when trying to invoke a law of physics learnt long ago and what turns out to have been acquired inadequately: "Because the acoustics, the resonance changes according as the weight of the water is equal to the law of falling water." (U, 364). This rambling sentence is the result of certain cognitive steps motivated by Senn in the following way: "Acoustics: the resonance changes [how exactly?]/ the resonance changes according as ... / [new start] the weight of the water ... [in formulae something is always] "equal to" / [there is a] law of falling ["bodies"] / [in this case] water." (Senn, Mihálycsa & Wawrzycka (eds.), 2012, 157). Thus, 'the law of falling water' is the result of an amalgam of Bloom's defective knowledge on physical laws.

Then, in the case of the following elliptical sentence: "Could never like it again after Rudy." (U, 213) we cannot tell who is that could never like it: I, he or she; but in the process of translation (at least, in the case of inflectional languages) one cannot avoid to identify the person and number through an inflection. As Fritz Senn puts it: "The more eccentric, specific, local or, in Joyce's case, refracted an item is, the less are its chances of travelling across to different cultural conditions." (Senn, 2012, 19)

Conclusions

All results of translations are inevitably incomplete, especially in the case of the Joycean texts, as we have seen in numerous examples above. The difficulties in translating this novel go far beyond the ones caused by the differences in linguistic structure of the source- and the target language (such as word order, tenses, questions of gender etc.) dealt with by the theoreticians of translation.

Often one does not have to translate sentences but "verbal events" (Mihálycsa & Wawrzycka, 2012, 216). On many occasions, the choices the English speaking reader faces are already made for the non-English speaking ones after the translational process. The original text of *Ulysses* often lets the reader be misled or at least momentarily puzzled by being deliberately ambiguous or misleading; while in translation this experience is often smoothed out. For, translators must choose from the multiplicity of a word's or sentence's facets, they cannot preserve them all (meaning, form, typographic or musical characteristics) in either of the other languages.

Translators of *Ulysses* face similar problems as the translators of poetry: they have to change everything (every word) yet somehow preserve everything (all meanings woven into those words). Just as in the case of poetry, *Ulysses* is heavily built on form: there are key elements in the novel that represent important motifs and keep recurring throughout the text. If these are not used just as consistently as in the original, if they are replaced by a synonym, they bring into the text different connotations and thus, the attentive reader may easily build a totally different chain of association and get off the original track. However, in spite of all the obstacles the translator meets with, the underlying problems are always interesting and challenging: if he manages to recreate some of the verbal and structural finesse of the original, he gives the possibility for the reader to go through a similar process of decoding and deciphering, even if they lead to different results than the original text (which they necessarily do).

One of the interviewers, J. Wawrzycka, suggests that a criterion by which translations could be judged, is how far they can assimilate the results of the numerous critical studies on *Ulysses* (*idem.*, 242). However, no translator of our time can be familiarized with everything literary criticism has produced on the novel. Since its first publication, it has become something much more different

from what its early readers could see in it. The elements connecting it to Homer's *Odyssey* are only one among many aspects that have to be taken into account when trying to interpret and translate the novel (see the many twists and distortions in the Eummaeus chapter, misleading metaphors, incongruities and malapropisms, etc.). When reading and translating a multi-layered kind of literature like the Joycean texts are, nobody can find all the possible meanings, overtones, quotes, allusions and cross-references hidden in the text. Joyce's prose is very 'slippery', one can never know for sure what overtones or connotations are important and significant in the light of the whole.

Fritz Senn stipulates that, first of all, translators have to be able to identify the basic elements, the factual level, the surface (*idem.*, 223) – for example the cultural, Irish references, the vocabulary of Hiberno-English, etc. – which is already troublesome. Secondary matters, such as reverberations, parodies, refractions and overtones, even if noticed, will often be sacrificed in absence of any other possibility to transpose them into a different language. And when translators try to somehow recreate these phenomena in their own languages, they cannot help diffusing misleading seeds, especially in the case of *Ulysses*, where readers learn that they have to be alert and look out for hidden meanings. An alert reader will find latent meanings in the translated text as well – as the saying goes: Search and you shall find – only probably not the ones that the original text offers.

The question is: does it matter if the reader of the translation comes to different results (regarding fine nuances in their impression, in the sense of atmosphere, overtones, etc.) as long as he gets involved in the process of reading, searching and 'investigating' just as much. Fritz Senn does not take a stand on the question of what a good translations should be like. He only suggests that translators should indicate in the preface of their work which direction the translation is going: trying to familiarize and bring the text closer to the target language and culture, or preserving the characteristics and the elements of the foreign culture; this way the reader knows what to expect (*idem.*, 219). An annotated edition can also be helpful because once the translator can resort to explicative notes, he always has a way to help the reader and he can do that outside the text itself.

We think, however, that every translation should be as faithful to the original work and to its stylistic features as the target language's constraints make it possible. This goal is very difficult to reach in the case of Joycean texts, but we think it should be the guiding principle of translators even if they often come across problems that seem insurmountable. This attitude characterizes the group of Hungarian translators who took the former Hungarian versions of *Ulysses* and reshaped them into a new one, restoring many structural and compositional linguistic elements that were ignored in the former translations for a number of reasons.

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CONCEPT OF CZECH SCHOOL AUTONOMY

Jana Poláchová Vašátková, Doc.Mgr., Ph.D., Assoc.Prof.

Michaela Prášilová, Doc.PhDr., Ph.D., Assoc.Prof.

Palacky University Olomouc, Czech Republic

Abstract

At present, Czech schools of the regional school system are autonomous: they have great power and more than ever before they bear responsibility for the quality of teaching and for overall school functioning. The article aims, first, to analyse the current progress of the process of the Czech school change into an autonomous organization focusing on the pedagogical school autonomy and the readiness of the executive staff to manage their new role, and, second, to describe the existing situation. Based on Lagerweij model of change management (1995) and using the conclusions of the analyses of documents of the Czech educational and school policy and relevant research findings related to the management of Czech schools, it can be stated that the process of Czech school change into an autonomous organization is still in the process of implementation even after 10 years. This conclusion confirms the complexity and intensity of the analysed change.

Keywords: school autonomy, pedagogical autonomy of the school, executive staff of the school, change management model, change management process, initiation, implementation, incorporation

Introduction

At present, more than ever before, Czech schools of the regional school system (i.e. schools providing pre-school, primary, secondary and non-university tertiary education) bear responsibility for the quality of teaching (see Pol, 2007), as well as for the overall functioning. School autonomy has brought about new expectations as regards the professionalism of the executive staff in particular. Since the Czech Republic has a more than 200-year long tradition of a centrally controlled school system, based on which schools only fulfilled tasks set at the state level, the school autonomy and the resulting full responsibility can be regarded as a change, i.e. as the result of the change management process. The article aims to analyse the current progress of the process of the Czech school change into an autonomous organization and to describe the current state of this process focusing on the pedagogical school autonomy and the related readiness of the pedagogical staff. The sources of data for the analysis are the documents of the Czech educational and school policy of the past two decades (e.g. strategic documents, development planning documents, regulations, evaluation and monitoring reports etc.) and

relevant national research findings related to the management of Czech schools from this period. Based on Lagerweij model of change management (1995), the conclusions of the content analysis of these documents is presented further on.

Initiation

The change is not a unique event. It is a process of three interconnected phases: initiation, implementation and incorporation (Lagerweij, 1995, 17). The success of each of the phases can be positively or negatively influenced by certain factors in schools where the change is implemented (Lagerweij, 1995; Fullan, 2001, 1993). According to Lagerweij (1995, 24–26), in case of the initiation phase it mainly refers to the following factors: connection of the projected change with existing needs, clear content-related change, stimulation of external school environment, characteristics of the change that can contribute to its adoption (interconnection with the existing opinion, a chance of testing prior to its own implementation, etc.) and availability of sources (human, information, etc.).

Initiation, which is the input phase during the adoption of the idea of the Czech school change into autonomous organizations, started after the social turning point in 1989 simultaneously with a number of other changes focusing on de-concentration and decentralization of the competence of the state authority, as well as the progressive substitution of directive hierarchic administration for approaches of partnership and cooperation, typical of a democratic society. Numerous legislative amendments in a rapid sequence (in compliance with the Bill of Fundamental Rights and Freedoms, No. 23/1991 Coll. and No. 2/1993 Coll.) offer the chance of juridical subjectivity of schools, establishing multi-year grammar schools and non-governmental schools (private, ecclesiastical), arbitrary merging of more schools of one founder etc. School funding is also codified per capita. The concept of school autonomy is highlighted in a number of transformation documents and proposals of expert groups, companies and authors' teams, in particular from pedagogical academic environment (e.g. Independent interdisciplinary group for the transformation of education, and others). Simultaneously with the academic and decisive sphere, the concept of school autonomy is also proclaimed by people from school practice, i.e. "underneath" (e.g. meetings of members of the so-called Alliance of school autonomy in 1994, activities of progressive pedagogues and the others interested in the association of Friends of committed learning, as well as proposals of the Association of Czech mathematicians and physicists). Over the course of time, the vision of school as an autonomous organization is clarified and specified (e.g. in conceptual and strategic documents in the education policy from 2001, 2002, 2005, 2007, 2011); it mainly refers to its potential and less to its impact on school work. The Czech school system gradually takes the "three-level" form (state, autonomy, school), whereas the cooperation of the state administration and self-administration is anticipated with the participation of other partners: parents, social partners, community. This also

meets the socially requested principles of decentralization, subsidiarity, participation and deregulation. The autonomy of Czech schools is then finally established by two legal regulations. As a result of the state administration reform all schools obtained juridical subjectivity, i.e. economic and personal autonomy, in 2003. Nevertheless, they obtained pedagogical autonomy only two years later in accordance with the Act No. 561/2004 Coll. Schools are obliged to develop, implement and evaluate their own school educational programme in accordance with curricular documents at the state level (Framework educational programmes). The autonomy of Czech schools is supplemented with an extended concept of accountability and Czech schools (their executive staff) are, compared with the previous era, fully responsible for the conditions, progress and outcomes of the provided education. Pedagogical autonomy is “primarily pedagogical self-determination, which practically means that the school formulates, implements, controls and is responsible for all pedagogical processes with their follow-up to socially pedagogical and therapeutic moments with all their goals, means and forms, without the supervisory and control mechanism of the state institutions.” (Rýdl, 1996, 67). In the Czech context the changing paradigm can be distinguished in case of the implemented pedagogical autonomy of schools (Posh, 2004; according to Stoll, Fink, 1996, the so-called “learning paradigm”), for it follows the “new interpretation of the content and concept of the education from the individual and social perspective” (Skalková, 2005, 19). This aspect affects the initiation implementation, as well as subsequent phases of the change, for it is neither possible to benefit from the interconnection with the existing belief, nor from the experience and expert readiness of those involved in the change process.

Implementation

According to Lagerweij (1995, 26–27), the success of the second phase, during which the intended change is to be implemented, can be substantially affected by the following factors. These include the effects of social environment, characteristics of the school in terms of its individual character, the possibility to divide the change implementation into phases which allows to control the progress and to assess the achievements, and other factors that belong to the aforementioned distinct content of the change. At the level of individual Czech schools, the implementation of the concept of an autonomous school is affected by a number of various and often contradictory determinants. They include, e.g., insufficient level of availability of external methodological and other support as against the adverse demographic development resulting in a competitive environment on the “education market”, and in the interests of the founders, particularly, in the economic aspect of school functioning, or a declared interest of the education resort in supporting high-quality schooling compared with the instability of resort measures taken in this direction, and others. An important aspect during the implementation of the change is also represented by the individual character

of the school, primarily the professionalism and the number of people affected by the change, the level of determination of the school management to implement this change and to present this intent and the previous innovation experience. School autonomy requires another concept of the existing role of the school executive staff and the necessity of internal care for the quality in individual schools (Karstanje, 2007). In the Czech environment, the school management is considered to be represented by headteachers and deputy headteachers. The outputs of empirical inquiries of the last decade mainly focus on the competence, professional activities, professional development of the headteacher (e.g. Pol, 2007; Sedláček, 2008; Pol et. al., 2009, 2010; Prášilová, 2011); accordingly, it is possible to obtain information about those actors who manage the school and are responsible for the quality of its work. For instance, it turns out that the headteachers of Czech schools are assigned obligations related to juridical subjectivity and school administration and only 20% of their working hours can be used for the control of the quality of schooling; and thus they claim that this is a task for the deputy headteachers who can also spend only about 20% of their working hours on it (Mc Kinsey & Company, 2010, 20–21). TALIS 2013 inquiry (Kašparová, et. al., 2014, 12–13) confirms that Czech headteachers spend approximately one fifth of their working hours on activities related to teaching. In Czech reviewed pedagogical periodicals there is no topic-related article about the role of the deputy headteacher of a Czech school. For the time being, no research has provided the evidence how the management of an autonomous school function as a team, in unison – cooperation, and what is the role of the deputy headteachers in this connection. So, the real change of the role of the executive staff can be characterized only to a limited extent, through the optics of empirical findings about the headteacher. They show his/her distinctly stronger role during leading an economically and personally autonomous organization, less during controlling and running autonomous pedagogical school work, though. As for the need for the quality care in individual schools, it is necessary to take two levels into consideration: internal care for the school quality and its interconnection to external mechanisms including external support. In this context, Czech environment reveals quite an unstable situation. An example could be that as implied in most curricular documents at the state level, schools were supposed to carry out school self-evaluation for a certain time, which is, however, gradually suppressed. The requested concept of the internal care for quality is not fully clarified (there are various “desirable” concepts resulting from different binding documents and different controlling activities). There are no conditions set for the implementation of internal care for quality (e.g. teachers were not professionally prepared for the implementation of internal evaluation). Czech schools still show reserves in a meaningful utilization of this institute (Santiago, 2012; Poláchová Vašátková, et. al., 2012). Moreover, the interconnection of internal and external evaluation of the past decade takes various forms and the steady form is still searched for.

The time framework for the implementation of the pedagogical autonomy is set to a most limited extent, and schools are thus given a maximum interval of two years to develop their own curriculum and to start teaching. This does not allow to divide the implementation of this phase into stages, to adequately check the progress and to assess partial achievements. In some respects, the school change is basically implemented only in the “planned, paper” form of the school curriculum.

Incorporation and/or implementation

The third phase, incorporation of the change, monitors the preservation of the permanence and viability of the implemented change. According to Lagerweij (1995, 28), there are important factors for this phase, such as an active approach of the school management, events near school (impact of the state policy, external help), as well as similar factors like in the phase of implementation. Incorporation itself is long-lasting and requires more than mastering the “management” technology (Lagerweij, 1995, 17).

The declared priorities consist in the completion of the Czech curricular reform and in the need to enhance the quality and efficiency of education (see Dlouhodobý, 2011), which anticipates a positive approach of pedagogues to these priorities. As implied in the available empirical findings, pedagogical autonomy is accepted inconsistently by teachers (Rychlá šetření ÚIV, 2007; Beran, Mareš, Ježek, 2007; Straková, 2007, 2010; Zpráva, 2007; Monitoring, 2009; Sociologický, 2009; Janík, et. al., 2010 a, 2010 b and others). And even in spite of multi-year experience of schools with the elaboration and implementation of school educational programmes, “a lot of pedagogues still do not regard their existence as an asset” (Výroční, 2014, 58). This fact has also been confirmed by the recent inquiry (Poláchová Vašátková, et. al., 2015) among the executive staff of schools providing compulsory school attendance in two regions of the Czech Republic. 67% of the respondents (headteachers and their deputies) state that functions of schools providing compulsory school education were not performed in a better way before the beginning of the change process (before 1989) and only 54% claim that functions of schools were performed in a better way before 2005 (before obtaining the pedagogical autonomy). Meaningful treatment of the autonomy has not fully become an integral part of the work of all schools and their executive staff yet. The form of systematic external support has been presented (Strategie, 2014), but the implementation starts only now. For these reasons, it is not possible to confirm the full mastering of the implementation phase of the change of Czech schools into autonomous organizations. And after nearly ten years of legislative anchoring of the existence of autonomous schools, the representatives of Czech educational policy recommend “To revise input education of headteachers with the emphasis on the development of skills in the area of pedagogical guidance” and “To create a complex system of professional development of headteachers respecting various needs in relevant phases of their career.” (Strategie, 2014, 28)

At the same time, it is demanded to provide system support to pedagogical leaders to allow them “to perform the teacher’s role in their school or in another school” (Strategie, 2014, p. 28) and to be helpful during the implementation of the upcoming motivational career system for teachers. The viability of the change in the school concept as an autonomous organization is thus questionable and the current events only confirm these doubts (e.g. progressive standardization of school curricula).

Conclusions

As implied in the previous text, the idea of Czech school change into autonomous organizations was initiated and enforced during the transformation of the whole Czech education system by pedagogical public, as well as by those involved in the education policy. During the initiation phase, however, the content of this change including demands laid upon their implementers, was not fully clarified. Formally, the implementation phase of school change into autonomous organizations has been fully completed, for school curricula were created at the level of individual schools and schools also function as legal entities. From a different point of view, the implementation of this change has not been completed yet. Since the pedagogical autonomy lays high demands on teachers in the area of “curricular expertise” (Janík, et. al., 2010a, 18), which the teachers find difficult to deal with, and only in the course of time they start to understand the real content of the change. This can be demonstrated by the fact that school curricula are continuously innovated, not only under external pressure (e.g. by the amendments of curricular documents at the state level or by resort activities focusing on the integration and evaluation of the results of the education of students in nodal points of their school attendance), but also through internal school initiative. “The increased school autonomy led to increased school responsibility as well as to a disproportionate transfer of obligations to the school level, without any additional preparation and support of headteachers and other executive staff.” (Analytický, 2014, 38). The outputs of other researches show that the extent of juridical subjectivity of Czech school is quite unique from the all-European perspective (Bouda, 2007, p. 17), and that it burdens the headteacher at the expense of leading the pedagogical school work (Prášilová, 2008; McKinsey & Company, 2010; Výroční, 2013; Kašparová, et. al., 2014). In this context, the driving force of teamwork within the management of schools (Schratz, 2007) is gradually appreciated: “key actors affecting the quality of education need to be regarded as executive staff in the whole school system who include headteachers as well as their deputies...” (Analytický, 2014, 34). Thus it can be concluded that the process of the Czech school change into autonomous organizations is still in the implementation phase and not even the past ten years were enough for the transition to the incorporation phase. Nevertheless, it is also possible to consider whether the Czech school change into autonomous organizations might not be also regarded as a natural consequence of all-society reforms implemented in a

series of more or less interlinked steps taken in a relatively short time. During the transformation of the Czech school system, “system reconstruction” was effected (Kotásek, 2005) and reflected in the change of the paradigm, whereas it is impossible not to reflect the power of continuity of the social development. It would be delusive to anticipate that the transition from one regime to another is immediate and easy. Večerník, (1998), Kalous (2000) and others in this respect refer to the theory of post-communist transformation, the so-called path dependency. It thus seems necessary to reconsider and to open a broader discussion on the issue of the “clarity of the content of the proposed change” consisting in the school change into autonomous organizations. The discussion involving all actors who more or less participate in the success of this change (not only teachers, executive staff, but also those involved in preparatory and further education, school authorities and others) could be most valuable.

The goal of the article was to analyse the progress of the Czech school change into autonomous organizations with an emphasis on pedagogical autonomy and readiness of the pedagogical staff for mastering their new role to assess the current state of this process. As implied from the presented facts, even after ten years the considered change is still in the implementation phase. This only confirms the complexity and intensity of the intended change which – in the Czech environment – also means the change of the paradigm of learning – i.e., school education.

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INTERART RELATION, EKPHRASIS IN JULIE TAYMOR'S *FRIDA*

Enikő-Szidónia Sinka, BA

Sapientia Hungarian University of Transylvania, Faculty of Economic and
Human Sciences, Romania

Abstract

We are all aware of the fact that during the centuries cinema has found a great source of inspiration in literature and great adaptations of literary works were born, but we are maybe less aware of the fact that the intermedial relationship between cinema and the other arts can be expanded to a new dimension as well: to the interart relationship between painting and cinema.

*This paper will emphasize the artistic oeuvre of the major female representative of the Mexican artistic world, Magdalena Carmen Frieda Kahlo Calderón, better known as Frida Kahlo, as seen through the lens of Julie Taymor's *Frida* (2002). This paper is going to explore and to examine the myriad ways in which Kahlo's paintings are (re)presented in the film. How the paintings (re) are presented in the film? Are they directly presented or only alluded to through the language of the film? What is the function of Kahlo's paintings within the diegesis of the film? In order to answer all these questions, the biopic about Frida Kahlo will be approached in terms of narrative structure, important climactic scenes will be analysed by employing the language of film, and, more importantly, this analysis will focus on the interart relationship between painting and cinema in terms of ekphrasis.*

Keywords: intermediality, ekphrasis, interart relationship, identity construction

An Intimate Relationship: Painting in/and Motion Picture

“The film of a painting is an aesthetic
symbiosis of screen and painting”.
(Bazin 1967/2005, 168)

The aim of this paper is to discuss the rich diversity of the relationship between painting and motion picture as seen through the lens of Julie Taymor's biopic, *Frida* (2002). The investigation of the manner in which the artistic oeuvre of the Mexican artist Frida Kahlo is presented as well as the role of paintings in the diegesis of the film all pose questions that this paper proposes to find answers to. The first part of the paper outlines the theoretical framework of this research, surveying relevant discourses related to the relationship between painting and

cinema. In order for this to be achieved, several specificities and relevant differences between the two media will be presented with special focus on the fruitful intersection between painting and cinema.

It is generally acknowledged that the interart relationship between cinema and the sister arts, or using Bazin's words, their "symbiosis" has been a subject of research for countless scholars. Literature has played a major role in the course of film history and great adaptations of literary works have come to life. However, adapting a work of art to screen is a complex task for every director, because there is an extremely large number of possibilities in doing it and their approach may lead to an unsatisfying or unfaithful adaptation of the literary source.

The question of *'fidelity'* when adapting a work of art to another medium is frequently, if not almost universally raised. In *Film Studies and Japanese Cinema* Mitsuhiro Yoshimoto approaches this aspect, stating that the *fidelity* of a screen adaptation to its literary source is a "misleading and unproductive notion because it establishes a hierarchical relation between the original and adaptation, and also because it assumes that there is some uniform set of standards for comparing two artworks in different media" (Yoshimoto, 2000, 258-9). For the French critic and theorist André Bazin, when an adaptation of a literary work takes shape, "[i]n no sense is the film 'comparable'" to the novel or 'worthy' of it. It is a new aesthetic creation, the novel so to speak multiplied by the cinema" (Bazin, 1967/2005, 142).

A 'new artistic creation' can also be seen in the encounter between painting and cinema. Paintings and the lives of the artists who created them have provided not only the source of inspiration for numerous films, but have also urged the filmmakers to focus on and explore the narrative possibilities that these static pictures can provide. In addition, since the moving image has the ability to develop in time, it does not only narrate and/or translate the narrative content contained within these pictorial representations, but it is also able to release them from their static and frozen composition into a dynamic and fluid one.

In the last few decades several critics and theoreticians have expanded their research in the field of cinema studies and they have analysed and interpreted in myriad ways the encounter between the two media as well as the (re)presentation of paintings in/and motion picture.

The model of *paragone*, i.e. the rivalry/competition between arts, can provide the starting point of our research. Gotthold Ephraim Lessing in his work *Laocoön, or On the Limits of Painting and Poetry* (1766) separates the visual arts from poetry, and draws strict boundaries between the two. He states:

I reason thus: if it is true that painting and poetry, in their imitations, make use of entirely different media of expression, or signs—the first, namely, of form and colour in space, the second of articulated sounds in time; [...] then it is clear, that signs arranged near to one another, can only express objects, of which the wholes or parts exist near one another; while consecutive signs can only express objects, of which the wholes or parts are themselves consecutive. (Lessing, 1853, 101)

Lessing develops further this idea arguing that while poetry can represent an action in time, a painting can represent a still and single moment in space; while poetry has a temporal nature, a painting can be perceived as a static object. At first glance, these issues can similarly be transposed to the encounter between painting and cinema, and binary oppositions, such as stillness/movement, static/dynamic character, space/time, frozen composition/fluid state can be set up. However, there is one important characteristic with which the cinema is privileged, and this is motion. Even though a sense of movement can be, likewise, represented in a painting (see Fig.1)], it heavily relies on the viewer's active participation to produce its effects, while movement in cinema can be achieved by means of its own cinematic techniques. Thus, the above mentioned 'rivalry' or 'competition' would be improper to be applied to the cinema's relationship to painting, since the movie's authority is in no way threatened by its intersection with this other medium.

This is exactly what the French critic André Bazin argued against in his essay *Painting and Cinema*. He rejected the communal view according to which "[...] the film is not true to the painting" (Bazin, 1967/2005, 164) [my ellipsis] and that the film is the "betrayal" of both the painter and its artistic creation. What he rather emphasized was the fruitful interaction between the painting in/and cinema. Furthermore, he argued that the films which infill a painting in their own medium, are independent works which should "not be judged by comparing them to the paintings they make use of, rather by the anatomy or rather the histology of this newborn artistic creature, fruit of the union of painting and cinema" (Bazin, 1967/2005, 168).

However, as André Bazin points it out, one difference between painting and cinema can be seen in the context of framework and in the treatment of time. In which regards the latter, the film's development in time happens horizontally and the unity of time must be preserved in order to provide the continuity of the narrative, while the time in painting "develops geologically and in depth" (Bazin, 1967/2005, 165).

The above mentioned 'union' between painting in/and cinema and the fruitful results that can be obtained at the intersection of these two arts, is undertaken by several scholars as an extensive analysis. Ágnes Pethő in her essay *The Cinematic Contract of Painting (A Festészet Filmszerződése)*, investigates the intermedial relationship between the two arts, from a structural and functional point of view. Her in-depth analysis is directed towards the manner in which in the (re)presentation of paintings in motion picture appear, as well as the function they have in the diegesis of the film. From the variety of intermedial relationships that can be depicted in the encounter between painting and cinema, she provides countless examples starting from the most basic level, until the most complex one.

Methods and Results.

The Concept of Ekphrasis from Ancient Rhetoric to Modern Practice

This part of the paper provides a survey of the term *ekphrasis* and presents the term's multifarious usage and the ways in which different scholars have defined it.

The purpose of this enquiry, providing a diachronic account of the term's development, is to highlight the shifts in its meaning from ancient rhetoric to modern practice as well as to test its applicability to the concrete film analysis, that of Julie Taymor's *Frida*.

Ekphrasis in Homer's *Iliad*

It is during the ancient times that the first instance of ekphrasis was recorded. The most famous and most often quoted ekphrasis appears in Greek literature, in Homer's *Iliad*. In the 18th Book of this work, Homer brings forth an elaborate picture about the making of the Shield of Achilles. When Hephaestus starts upon his work, Homer narrates:

First fashioned he a shield, great and sturdy, adorning it cunningly in every part, and round about it set a bright rim, threefold and glittering, and therefrom made fast a silver baldric. Five were the layers of the shield itself; and on it he wrought many curious devices with cunning skill. (Book 18, 478)

The later passages continue to describe the process of creation of the shield. Hephaestus's wrought provides an in-depth, complex image of the Homeric world, of the elements related to human life and experience: marriage, festivals with dancing and singing, ploughing, harvesting, to mention but a few (e.g. Book 18, 490).

What is fascinating about the description of the passage(s) is not only *what* they present, but rather *how* these passages contribute to the visual representation of the shield. What is represented/engraved on the shield is the entire microcosm of the Greek culture, human life and experience, a shield which nobody dared to look at: "So saying the goddess set down the arms in front of Achilles, and they all rang aloud in their splendour. Then trembling seized all the Myrmidons, neither dared any man to look thereon, but they shrank in fear" (Book 19, 12). Homer's ekphrasis provides a detailed pictorial representation about the production of the shield, inducing the reader or listener to imagine and 'see' in full detail the content of the object by the suggestiveness of the words and language used. The verbal description of the *imagined* visual representation provides a vivid and suggestive ekphrasis of the shield in the state of being made, rather than providing an image about a shield that is finished/completed. I have used above the term "*imagined* [my emphasis] visual representation" to question the existence of the shield. It is curious that the existence of the shield is not

confirmed, nor strengthened by any other character of the narrative poem (as we have seen above, nobody dared to look at it; and the pieces of information provided by Homer are gathered from a second source – “So saying [my emphasis] the goddess set down the arms in front of Achilles” (Book 19, 12) – yet Homer’s words have the power of evoking that fictional object. I have stressed upon this issue in order to highlight the twofold function of the ekphrasis: the narrator’s ability to use a vivid and suggestive language to create an image in the reader/listener’s mind and the reader’s/listener’s capability of visualizing the described image/object.

W. J. T. Mitchell in his essay entitled *Ekphrasis and the Other* gives examples of ekphrastic instances, implying that the first examples of ekphrastic descriptions in poetry were based on verbal representations of objects (such as Keats’s *Grecian Urn*, Achilles’s shield) which also happened to have “ornamental and symbolic visual representations attached to them” (Mitchell, 1994, 165). In addition, he analyses several poems in terms of their ekphrastic description and he discusses at length the passage from Homer’s *Iliad* about the creation of the shield of Achilles. Mitchell states:

Homer’s whole point seems to be to undermine the oppositions of movement and stasis, narrative action and descriptive scene, and the false identifications of medium with message, which underwrite the fantasies of ekphrastic hope and fears. The shield is an imagetext that displays rather than concealing its own suturing of space and time, description and narration, materiality and illusionistic representation. (Mitchell, 1994, 178)

He reads the description of the making of the shield using the term “imagetext”, implicitly implying the complementarity between image and text, an image that is still but put in motion in the poem by Homer’s words. The first part of his interpretation is built on binary oppositions, further on, highlighting main issues related to the ekphrastic experience: both hope and fear. Hope for the success of the visual representation, and fear of the failure of verbal representation. In addition, Mitchell stresses upon the function of the shield within the epic and he points out that the shield does not have to be merely seen as an “ornament” of the narrative poem, but rather as one object that stands for the whole, in the sense that by the technique of “ring composition” the shield functions “as an emblem for the entire structure of the *Iliad*” and above all, it represents “much more of Homer’s world than the *Iliad* does” (Mitchell, 1994, 179–180).

Murray Krieger approaches this issue from another perspective. He focuses on what the shield represents on an individual level, but also on a grand scale. He speaks about the shield’s dual protective character, mentioning that it has both physical and spiritual connotations. The shield has physical protective character in the sense that it makes its wearer invulnerable and irresistible in the battle, while, on the other hand, the shield, seen as a “sanctified icon” since its wrought represents the entire Greek culture, “defines who he is [Achilles] as representative and defender of his culture against all outsiders, and representative tool of the gods who protect that culture through him” (Krieger, 1992, xvii).

The Context(s) of the Ekphrasis

The ekphrasis has been the subject of research for countless scholars. In her book entitled *Ekphrasis, Imagination and Persuasion in Ancient Rhetorical Theory and Practice* Ruth Webb provides an account of the term's usage and its meaning in the context of the Antiquity. She states that the first trace of the ekphrasis can be found in the first century C.E., more precisely in the rhetorical Greek schools of the Roman Empire. The ekphrasis was part of the *Progymnasmata*, and it was a rhetorical training exercise by means of which the talented students could develop their oratorical skills and compose and perform valuable speeches when they put in practice the rules of ekphrasis. The first definition of ekphrasis appears among these rhetorical training exercises and it is a “[a] speech that brings the subject matter vividly before the eyes” (Webb, 2009, 1). By the language used within these speeches the aim of the orator was to “make the audience feel involved in the subject matter, to make them feel as if they were at the scene [...]” (Webb, 2009, 10). [my ellipsis]. Thus the ekphrasis, understood as a type of speech, had a twofold character: it involved both the orator and the listener(s) to produce its effect.

At this point we may raise the question: what lies behind these speeches that have the impact on the listener to imaginatively respond to a speech by ‘seeing’ the words and moreover, what is the nature of the ekphrasis that has the ability not only to place a subject before the listener’s eyes, but also to involve him/her in the situation created?

One answer to these questions can be found in the 10th Chapter of Aristotle’s *Rhetoric*, where he stresses upon the ability of the words to make the listener “see things”. To support his point of view, he starts with the argument that the very essence of the words is that “words express ideas, and therefore those words are the most agreeable that enable us to get hold of new ideas” (Aristotle Chapter 10/ 1410b). Further on, he digs deeper into this statement by giving examples using metaphors and he distinguishes between two types of metaphors: those that have the quality to evoke an image in the listener’s mind and those which do not have this ability. The distinction between the two stands in the fact that in the former, the images evoked are presented as being in a state of activity, thus in motion, while in the latter there is no sense of activity, the metaphors describe a static image. Aristotle explains this: “By ‘making them see things’ I mean using expressions that represent things as in a state of activity. Thus, to say that a good man is ‘four-square’ is certainly a metaphor; both the good man and the square are perfect; but the metaphor does not suggest activity. On the other hand, in the expression ‘with his vigour in full bloom’ there is a notion of activity;” (Aristotle, Chapter 11/ 1411b) where ‘in full bloom’ gives the effect of the activity it conveys.

Another answer may be given by raising the question related to the quality of the ‘words’ within a rhetorical speech. How can the language/words used within a speech bring forth an image in the hearer’s mind when, according to semiology, the words are linguistic signs within a language? Moreover, which speech can be considered ekphrastic and not only a mere description of facts? The key to the

complexity of these questions can be given using two Greek words: *enargeia* and *phantasia*. As Webb points it out in her work, these two words are the basic concepts for the ekphrasis to produce its effect. The *enargeia* is not only the ability, but also the persuasive quality of the language to construct an image in the listener's mind, while insisting both on the speaker's and hearer's imagination (*phantasia*). She mentions that the *enargeia* is: "the quality of language that appeals to the audience's imagination [...] which is central to the definition of ekphrasis" (Webb, 2009, 88) and that this quality "makes an ekphrasis an ekphrasis and distinguishes it from a plain report of facts [...]. It is able to arouse emotions through immaterial semblances of scenes that are not present to the listener and may never have taken place" (Webb, 2009, 107) [both my ellipsis].

The ancient concept and understanding of the ekphrasis can be regarded as being narrow, in the sense that it underlines the fact that in this period, the ekphrasis was not yet linked to the visual arts and according to the *progymnasmatic* definition the goal of a speech was to bring "the subject matter vividly before the eyes" (Webb, 2009, 1). Webb insists on the applicability and different ways in which the ekphrasis was used within the ancient rhetorical practice, providing her own definition of the ekphrasis. Her own view highlights several features that will be quintessential to the modern usage of the term. She asserts that

an ekphrasis can be of any length, of any subject matter, composed in verse or prose, using any verbal techniques, as long as it 'brings its subject before the eyes' or, as one of the ancient authors says, 'make listeners into spectators'. [...] So, while the visual arts may be literally absent from this definition of ekphrasis, and from most of the discussions by ancient rhetoricians, the idea of the visual underpins this mode of speech which rivals the effects of painting or sculpture, creating virtual images in the listener's mind. (Webb, 2009, 8–9) [my ellipsis]

Further studies illustrate the gradual shift of meaning of the term ekphrasis. The pioneering work in this respect is considered to be Leo Spitzer's essay on Keats' "Ode on a Grecian Urn". This study, published in 1955, had a major influence on the applicability of the ekphrasis, in the sense that it detached the term from its traditional meaning and transposed it into a wider context. Spitzer defines ekphrasis as follows:

It [the "Ode on a Grecian Urn"] is first of all a description of an urn – that is, it belongs to the genre, known to Occidental Literature from Homer and Theocritus to the Parnassians and Rilke, of the ekphrasis, the poetic description of a pictorial or sculptural work of art, which description implies, in the word of Theophile Gautier, "une transposition d'art," the reproduction, through the medium of words, of sensuously perceptible objets d'art ("ut pictura poesis") (Krieger, 1992, xiii).

Although Spitzer is considered to be the forerunner of the extended meaning of the ekphrasis, his achievement made possible a new appreciation of the term, by grouping and including the usage of this term in the poetic genre. By defining the

ode as part of a long tradition called ekphrasis, he might also imply that the ekphrasis has achieved to “transcend both time and place”, expanding its definition not to one description of work of art, but more widely, to “poetic descriptions of works of art” (Webb, 2009, 34–5).

Murray Krieger’s influential work *Ekphrasis. The Illusion of the Natural Sign* is the first one which deals at length with the expansiveness of the ekphrasis. He starts his inquiry from a critical and theoretical vantage point, and he regards the ancient practice of the ekphrasis as follows: “It was, then, a device intended to interrupt the temporality of discourse, to freeze it during its indulgence in spatial exploration” (Krieger, 1992, 7). As a starting point of his study he accepts Spitzer’s definition of the ekphrasis. He proposes to expand the usage of the term in a wider context and he states: “Even while deferring the special connection between ekphrasis and works of the plastic arts, I will broaden the range of possible ekphrastic objects by re-connecting ekphrasis to all ‘word-painting’” (Krieger, 1992, 9). The term “word-painting” that he uses stands for the descriptions of visual works of art. Thus, he applies the term ekphrasis not only to mere words that describe an “objets d’art” as Spitzer mentioned, but more extensively, to the capacity of the words within the language to describe pictorial works of art. He mentions that this ‘(re)-connection’ of the term ekphrasis with the visual arts (e.g. painting) is favourable and advantageous both for the discourse and for the reader. Or, in other words, the description of a pictorial work of art within a discourse doesn’t have to be regarded as a competition between the verbal and its visual representation, because the pictorial work of art has its own “spatial completeness” and it has a “constant” state of being; because of these characteristics it doesn’t rely on the reader’s perceptual ability, which may vary from subject to subject, because a pictorial work of art already has a “fixed representation” (Krieger, 1992, 8). As a consequence, the verbal representation of a pictorial representation enriches the discourse in which it appears.

Krieger’s work is generally accepted by the contemporary theoreticians as having a great influence on the development of the term ‘ekphrasis’. What Krieger’s work is broadly about is that he traces down the development of the ekphrasis principle in the poetic medium, starting from the *epigram* to the *narrow belief* about the *ekphrasis* which further on completes itself in the “poem-as-emblem”. He states that this shift from epigram-ekphrasis-emblem is: “the first major extended moment – and the most complex- – in the history of my subject” (Krieger, 1992, 23). Even though he extended the applicability of the term to a wider context, he did not yet apply it to the sister arts.

W. J. T Mitchell develops even further the applicability of the ekphrasis and as a starting point to his essay on *Ekphrasis and the Other* claims that the ekphrasis is “a curiosity” and that “it is the name of a minor and rather obscure literary genre (poems which describe works of visual art) and of a more general topic (the verbal representation of visual representation)” (Mitchell 1994, 152). Further on, he speaks about the ekphrastic experience as a description/representation which

consists of three levels: *ekphrastic indifference*, *ekphrastic hope* and *ekphrastic fear*. The transit through the different moments/levels raised by Mitchell begins with the *ekphrastic indifference*: a verbal representation which refers to an object described or invoked, which, however, cannot have a visual presence in the same manner an image has; as he herself states: "Words can 'cite' but never 'sight'" (Mitchell, 1994, 152). At this point we may observe the division between the word and image as two separate modes of representation that may not be intertwined, as the ekphrasis might indicate. Meanwhile, the *ekphrastic hope* is the phase in which the reader discovers a sense in which the language can fulfil the desire of many writers: "to make us see" (Mitchell, 1994, 153). This is a central point for the ekphrastic experience, because it marks the moment when the illusion of the verbal representation is suspended (ceases to exist) and the receiver understands it as a paradigmatic linguistic expression. Or, in other words, a free exchange or interconnectedness appears between the verbal and visual representation and the dialogue between the two is broader. The third phase is the *ekphrastic fear*. Mitchell asserts that "This is the moment of resistance or counterdesire that occurs when we sense that the difference between the verbal and visual representation might collapse and the figurative, imaginary desire of ekphrasis might be realized literally and actually" (Mitchell, 1994, 154). This resistance to the interconnectedness or reciprocity between the verbal and visual representation may stem from the possibility that the verbal can be displaced/substituted by the visual representation. Even though there might be a resistance between the verbal and visual representation, the ekphrastic fear can be seen as reaching one step further than the ekphrastic hope, because the imagination makes possible a visual representation within a verbal one.

After this survey about Mitchell's categorization of ekphrastic experience we can conclude that the 'Other' which Mitchell refers to in his title is "the other semiotic" because "[...] from the standpoint of referring, expressing intentions and producing effects in viewer/listener, there is no essential difference between text and images and thus no gap between the media to be overcome by any special ekphrastic strategies" (Mitchell, 1994, 160) [my ellipsis]. The most important element from this quotation is that the ekphrastic practice can occur in any medium and its applicability is not restricted to a speech that brings forth an image in the listener's mind (as in the ancient rhetorical practice) or to poetic descriptions of an object d'art (Leo Spitzer), or words that describe pictorial works of art within the poetic medium (using Krieger's term "word-painting"). On the contrary, the ekphrasis in the modern practice has achieved its status as being "the verbal representation of visual representation" (In. Mitchell, 1994, 152 and Sager, 2008, 13) while its applicability can occur in any medium.

Laura M. Sager Eidt in her work entitled *Writing and Filming the Painting. Ekphrasis in Literature and Film* investigates the relationship between literary texts and films that depict art. She proposes to explore, in terms of ekphrasis, the interrelationship between the above mentioned arts (fiction, film and painting). Even though the term ekphrasis was not yet applied to the cinematic medium

(Sager, 2008, 18), her study draws attention to the diversity of modes in which films can transmediate paintings. In her study, she analyses instances of cinematic ekphrasis in the works of several artists (such as Francisco Goya's *El sueño de la razón produce monstruos* [The Sleep of Reason Produces Monsters], Rembrandt's Self-Portraits and Johannes Vermeer's *Girl with a Pearl Earring*), from a quantitative and qualitative point of view, which occur in several scenes/sequences. In addition, Sager creates her own system of categorizing the ekphrasis and they are as follows: attributive, depictive, interpretive and dramatic ekphrasis (Sager, 2008, 44–63).

Taking into consideration the above mentioned development of the term 'ekphrasis' and its extended applicability, this analysis of Julie Taymor's *Frida* relies on Sager's categorization of the ekphrasis, enriched with my own 'reading' and interpretation of Frida Kahlo's artistic oeuvre as depicted in the cinematic ekphrasis in which they occur.

The 'Sine Qua Non' of Kahlo's Artistic Oeuvre

Frida Kahlo's painterly oeuvre can primarily be seen through the lens of her tragic life story. Her work has been analyzed in relation to her biography, in the immense shadow of Diego Rivera's persona; she was (mis)labeled by André Breton as Surrealist. Although she denied having been influenced by the Surrealist movement, claiming that she was a realist who painted life as she saw it, when one looks at her art, cannot help observing something Surrealist in it. If reality for Kahlo was the skeletons atop her bed or portraits whose body is rooted in nature, then she surely was a Surrealist as André Breton said when he met her.

Even though pieces of biographical information provide a great understanding of her work, these should not become the substitute of a rigorous analysis because in this sense her achievement as an artist is diminished. Given the fact that she did not have an art school education, it is astonishing to realize how much she had been able to achieve. Her education came through enormous reading, practice and study of the history of art and by these means she was able to attain a level of mastery in art as an artist. Her evolution as an artist is mostly evident in her self-portrait which constitutes more than half of her life work, but she also created portraits and still-life paintings.

Kahlo has been admired for her unabashed focus on the personal. It is especially her self-portraits that show her insistence upon the importance of the female self as seen by herself. This approach challenged the traditional art discourse. Then, it was woman as object rather than subject that dominated art history, and Kahlo's work significantly changed this view. Her self-portraits are enriched with a wealthy vocabulary of imagery, and a direct style that enables the viewer to share her emotions. These self-portraits present the represented self in different stages of her life. The represented self, as Judit Pieldner has pointed out: "[...] mirrors the self-examining look of the artist as well as the look of the viewer/reader – a

mise-en-abyme structure is opening up, in which the self-portrait becomes the trope of self-understanding" (Pieldner, 2008, 209). Throughout the self-portraits she constructs her identity and at the same time she deconstructs the self, presents both a tragical and triumphant duality of the self; they (re)present a female body in disintegration, broken or fragmented, alienated. A large number of her work represent profound expressions that provide insights into decay, mortality and sexuality; she also deals with previously unrepresented topics such as birth, miscarriage and illness, to mention but a few.

Growing up in a milieu of mixed cultures during a period when the Mexican Revolution was at its edge, she embraced her art with national pride and indigenous traditions. If one has a look at her artistic oeuvre from a wider perspective, it can be said that her artistic creation presents events from her life and people meaningful to her and that "her art was not influenced by anyone but by her own pain" (Cardoza y Aragón, 1953). Moreover, her oeuvre expresses a constant dualistic intersection which shifts from the personal to the political sphere, from the historical to the cultural; from pleasure to pain and visions about life and death can be depicted. However, her self-portraits cannot pass unnoticed, due to their transparent autobiographical expressions of strength and survival in the face of the everlasting adversity (that is her pain). Her artistic oeuvre is almost entirely centered on depicting her *body* mostly being presented as disintegrated, wounded, penetrated, broken and often bleeding. In the introduction of *The Diary of Frida Kablo. An Intimate Self-Portrait* Carlos Fuentes notes that "The body is the temple of the soul. The face is the temple of the face. And when the body breaks, the soul has no other shrine except the face" (Fuentes, 2005 [1995], n.p.). The imagery of the suffering body which appears in many of her works has its primary roots in the dreadful accident that she had and all the sufferings throughout her lifespan are endlessly reproduced in her self-portraits. However, her constant self-analysis embedded in her self-portraits "should not be regarded as an idolatry of the self" (Pieldner, 2008, 207), but rather it can be comprehended as if her self-portraits beheld an underlying power, just like a mirror, to reflect the unified subjectivity and to project that unified self-representation into the public sphere. Moreover, the wounded, disintegrated or broken *body* should not be regarded as compromising or 'dehumanizing' the self. It might rather be interpreted as a depiction of the self which locates her whole identity in artifact.

The representation of her *body* is the 'sine qua non' of her artistic oeuvre. Constantly being the subject for her own work, as she herself stated in her self-intimate diary, she carefully constructed and created a self-conscious artistic persona. What is fascinating about her 'autoretratos' – self-portraits – is what they reveal the manner in which the image of the *self* is constructed. The 'participant' seems as if she had thought of herself as an object to be looked at. She doesn't adopt any of the stereotypical poses which very often artists arrange themselves into, moreover, she doesn't even think of smiling. The ambivalence of elements, the cold facial expression as well as the binary oppositions are recurrent themes of her personal style such as: process and completion, fragmentariness and wholeness,

renewal and decay. The pictorial self invites the viewer to wander into these 'spaces' to decode their meaning, by sliding away from the *body* to the *soul*. The representation of perfect beauty with all its images of the finished, completed man in classical art turns into being inwardly driven at Frida, while the body is subject to decay (see. Fig. 2).

After Frida Kahlo's death (13 July, 1954) her unique life and art, seen as a self-reflexive 'mirror', became the subject of debate for several artists, art historians, art critics, scholars, collectors and even cinematographers. Her artistic reputation earned a phenomenal attention. The proliferation of writings about Frida Kahlo is almost entirely based on the narrative of her life, recapitulating her dramatic life history. Other major approaches have combined both feminist and cultural analyses.

In a newspaper article published on May 3, 1953 in Boletín del Seminario de Cultura Mexicana the Guatemalan critic Luis Cardoza y Aragón describes Frida as a refined and tragic painter, whose work is an act of catharsis. Moreover, he states that through her art she seeks to free herself /to escape from pain and celebrate life (Cardoza y Aragón, 1953). He continues the characterisation of the artist's oeuvre by rejecting the idea of surrealism in her work, stating the following: "in the work of Frida there is no other influence from anyone but her own pain [...] there is a presence of the Hispanic past, but not of surrealism. Alluding to the presence of this trend in her paintings is [...] ignoring the Mexican land and its sensitivity" (Cardoza y Aragón, 1953) [my ellipsis] Her perpetual physical pain found a voice within her art, through which she began to tell her unique and authentic life story.

Her overall oeuvre is visually extremely powerful, through which the pictorial self's artistic expression often resembles a testimony of her feelings in anguish. The authenticity of these feelings that she has created in her art is like a new and profound Hamletian monologue. Her art can also be seen as a mysterious battle, as an inner 'massacre' within her soul in which a constant duality is present. Her inner life is besieged by this duality between diurnal and nocturnal forces, between beautiful and depressing imagery, sometimes dreamlike and violent expressions, all of which are entangled within her soul.

Discussion

Kahlo in *Frida* – A Biopic by Julie Taymor

The last chapter of this paper includes both a theoretical and a practical part which will unfold as follows: firstly, the biopic about Kahlo will be approached in terms of narrative structure; secondly, the manner in which the story is being presented will be analysed employing the language of the film; thirdly, in order to expand the analysis about the interart relationship between painting in/and cinema, Sager's system of categorizing the cinematic ekphrasis will be employed,

enriched with my own 'reading' and interpretation of Kahlo's oeuvre. This research does not wish to build up a hierarchical scale between the two arts, nor to argue against one art form and praise the other; what rather desires to get accomplished is to stress upon the great varieties and rich encounter between painting and cinema and to highlight the fruitful results that can be obtained at their intersection.

Narrative Structure and the Language of Film

As the title suggests, *Frida*, directed by Julie Taymor in 2002, is a film about the life of the female Mexican painter, Frida Kahlo. Based on Hayden Herrera's biography of Frida, considered a trustworthy account of her life, the film renders, through the fluidity of scenes and images, the visual biography of one of the most passionate, unique in style and altogether complicated painters. The choice of the filmmaker to use Herrera's biographical work is critical to understand how the film is organized and nonetheless to attain a profound understanding of the painter's life and art. Moreover, the filmmaker 'stripped' the text of unsuitable events and chose passages from the text to suggest a synchronic development both in Frida's life as well as in her art. The film's narrative provides a survey of thirty-one years (1922–1953) in the character's life and it has special importance because it provides information about the extraordinary development in her artistic work. The proliferation of Frida's works is presented, almost entirely, in chronological order, the selection of which encompasses the painter's various motifs such as self-portraits, the Hispanic heritage, the twofold character of life and so on. Likewise, the film is careful enough to include at least one example of the most significant medium through which Kahlo created: the mirror.

The biopic about Kahlo starts and ends with the same setting. The opening scene begins with a travelling extreme long-shot (ELS) presenting the courtyard of the Blue House. The camera, being positioned at a high-level on the right edge of the frame provides an overall view in which the action will unfold. This location setting instantly produces meaning: it does not only convey cultural information, but it also provides the context for the narrative action. The depictions of certain cultural iconic elements, as well as elements from nature, are relevant, in the sense that they signify cultural and national identity. The whole composition of the setting is lively and colourful: the vibrant and still beautiful blue walls, the cacti which fill the courtyard, the Aztec statues as well as the parrot and the hairless dogs immediately indicate the place of the narrative, which is Mexico City. The movement of the camera is connected with the progression of the narrative. The pace of the camera movement emerges slowly in order to allow the viewer more time to become acquainted with the location and a few characters. Further on, as the narrative progresses, the viewer is brought even closer. What the viewer is allowed to see at the beginning is several men maneuvering a bed, struggling with the bed's overpower. A change in the shot occurs in order to present the exterior of the Blue House and the men as they heave and lift the bed

onto a flatbed truck, waiting outside the house. The viewer hears (off-screen) a voice saying: "Careful, guys. This corpse is still breathing. Try to get me there in one piece" (Frida qtd. In. Sunshine, 2002, 25). With these words the main protagonist is introduced. The viewer can now see Frida (Salma Hayek) in her 40's, laying in the bed, dressed with her traditional Tehuana dress, her adornments being a red head scarf, a glimmering gold necklace and earrings. The beauty of Frida's outfit and her appearance is in contrast with her pale and drawn face. Her performance, the confinement to bed as well as her non-verbal communication, her facial expression show flashes of intense pain, which is further intensified as the truck lurches through the narrow street. At this point the title gets credit and the journey begins, being accompanied by her sister Cristina (Mia Maestro) and Aurora (playing the role of the Indian foster-mother), both wearing festive dresses.

What a shot consists of is crucially important because a significant part of the meaning produced by a film comes from its visual content, to a large extent this is how a story is told. Therefore, two significant elements of the *mise en scène* must not be overlooked: *the props*. The truck and the mirror function as important props. The truck plays a very active part in the narrative because the voyage and the mythical/virtual journey begins with it. The mirror's function within the story is also of great importance. The mirror is the leitmotif in the painter's life. By staring up into a large mirror which is bonded on the underside of the canopy, Frida's reflection stares back at her [see Fig. 3a/b]. However, there is a deeper significance of this self-reflection. Until this moment, the viewer was only a witness, watching all the elements of the *mise en scène* as they unfold. From the moment Frida stares at the mirror, the viewer's viewpoint and status is changed as regards its relation to the narrative. Frida's gaze into the mirror implicitly brings the viewer closer to her, showing events from her physical standpoint, conveying her personal/subjective perception of events from a first-person perspective, as if the viewer were the character. The first-person point of view is achieved when the protagonist is looking directly into the mirror, thus into the lenses of the camera. This cinematic technique is called direct address and its function is to situate the audience inside the point of view of the character towards whom the performer's gaze is directed.

Christian Metz states that film is very similar to a mirror but at the same time it differs from it. The similarity between the two stands in the fact that both are capable of reproducing/reflecting elements, but one main difference is that in the motion picture the viewer's image is never reflected (in Casetti, 1998, 162-5). In a narrow sense this statement is acceptable, but on a deeper level this idea could be expounded. With the subjective viewpoint, the direction of the performer's gaze (into the mirror) is primarily directed towards itself and secondly towards the camera and the viewer, the camera functioning as a medium, thus it implies a reciprocal viewpoint involving a sender and a receiver (the viewer's image does not need to be reflected in any way in the fictional world created, it is not the case. However, because all narratives are communications, the viewer can identify with the story and even with the character's viewpoint).

Further to our discussion, one crucial cinematic technique needs to be mentioned: the *flashback*. The discourse (the manner in which the story is told) begins with this innovative technique, framing the story-within-the-story. The viewer is invited to witness, through a flash back in time, the memories of the protagonist as seen with her inner eye. The camera gradually zooms the reflected image within the mirror until an extreme close-up (ECU) of the face is achieved. Her reflected image begins to smile and as she does she turns and the shot fades into another one. This technique indicates transition from one shot to another, but also a change in the setting as well as the passing of time – in our context the chronological time is reversed and we encounter Frida as a young and full of life fourteen-year-old girl, wearing her school uniform and running down the corridor at the National Preparatory School. This continuity editing establishes spatial, as well as temporal relation between the two shots. From this moment on, the discourse has begun and the pieces of information are not revealed, but presented. The narrator (Frida) is a homodiegetic narrator, who is present and takes part as a character within the narrative. The narrator does not only mediate the events, but all the information within the narrative is presented as experienced by the main character. This style of narration provides the closeness between the viewer and the main subject, and directs the viewer/receiver into a definite ‘channel’, revealing episodes from the past. The knowledge of these events is required in order for the narrative to convey meaning and to supply the sense of continuity and coherence of the story which is necessary for the logical progression of the narrative.

Interart relationship in terms of Ekphrasis

The encounter between the two art forms (painting and/in cinema) can be further developed and discussed in terms of *ekphrasis*. In recent years there has been a growing interest in this rhetorical “technique”. The proliferation of modern discourses regarding this term defined ekphrasis as the “verbal representation of visual representation” (Sager, 2008, 13). The term’s multifarious use can be seen in literary genres, such as poems, novels, drama, but contemporary scholars have applied the applicability of ekphrasis to cinema as well. This intermediality or interart relationship between the art forms, in our context between painting and cinema, can be applied to Taymor’s biopic of Frida as well. Even though the whole movie cannot be analysed in terms of ekphrasis, there are sequences of shots in which the cinematic ekphrasis can be depicted. In order to analyse the type(s) of cinematic ekphrasis encountered in this motion picture, I have employed Sager’s categorization of the ekphrasis. I will mention the most relevant one for our context: the ‘dramatic ekphrasis’. My aim is to enrich this analysis by providing my own ‘reading’ of Kahlo’s work as depicted in the cinematic ekphrasis in which it occurs.

By means of the dramatic ekphrasis “the images are dramatized and theatricalized to the extent that they take on a life of their own”. Moreover, this dramatization of an image “throughout several shots” may function “as a comment on the episode or sequence while simultaneously reflecting on the pictorial image. In film this

can be done in a slow or rapid montage, moving camera [...]" These images within a montage "can take the place of verbal commentary", and they can be shown entirely or in close-ups (Sager, 2008, 56–61) [my ellipsis] The definition that Sager provides has two important elements that must be highlighted. The first one is that in a dramatic ekphrasis the images can *take on a life of their own* and that they can function as *comments* while reflecting on the pictorial image. What these two elements have in common is a high degree of self-reflexivity. There are several sequences of shots within this biopic in which the dramatic ekphrasis occurs, in the sense that images/paintings take on a life of their own.

One instance of dramatic ekphrasis can be depicted in the scene in which Frida catches her husband cheating on her with her sister Cristina. Right after this incident, a whole sequence of shots presents Frida's inner turmoil and her state of mind. After discovering the affair between the two people most beloved and closest to her, Frida moved out of their house (from San Angel) into an apartment where she lived alone for a period of time and the sequences of shots recreate this moment. The golden section of the dramatic ekphrasis occurs in the scene where Frida cuts off her hair, maybe as an act of vengeance against Diego, against his unrepentant philandering character (see Fig. 4a). The long hair (which Diego was very fond of) made her feel like a sexual being, while cutting it off in a terrifying manner was to give up her sexual power, also illustrating how unfeminine has her husband made her feel.

The painting which takes on a life of its own and gives the outburst of this scene is *Self-Portrait with Cropped Hair* (1940) (see Fig. 4b). The composition of this famous painting has a Surrealistic power. The over-sized man suit, the scissors next to a dropping hank of hair may illustrate her divorce from Diego, while the cut hair which surrounds her resembles snakes as if swimming in a brown sea. The hair may also be interpreted as roots/veins which penetrate the marooned soil as if signifying that their betrayal and her pain is rooted deep inside her heart. The feeling of anguish and despair is reinforced in the film when Frida states to Diego: "There have been two big accidents in my life, Diego. The trolley, and you. You are by far the worst"; (Frida qtd. In. Sunshine, 2002, 112). Even though Frida had suffered tremendously when she found out about the affair, she had the power to mock her own pain. This is illustrated in the inscription (seen both on the canvas and on the walls from the room) that stands as a testimony of this artistic creation: "Mira si te quise, fué por el pelo, /Ahora que estás pelona, ya no te quiero" [Look if I loved you, it was for your hair, /Now that you are bold, I don't love you anymore].

The dramatic ekphrasis of this scene can be interpreted as being in close connection with the *progymnasmatic* tradition of 'placing before the viewer's eye'. This achievement stands in the fact that the sequences of shots in which the dramatic ekphrasis occurs do not only evoke the narrative content of the painting, by bringing an image into the viewer's mind, but they rather place before the viewer's eye the depiction of the whole 'creative' process of the painting as felt

and lived by the artist, the emphasis being on what lies beneath the surface of the canvas and the feelings that prompted in creating the painting.

The ekphrastic phenomenon of the dramatic scene allows the viewer to simultaneously focus on the representation, both at the level of visual and pictorial. This 'contamination' or playful interaction between these two levels is made possible in this shot (in which she cuts off her hair) through the use of frames – the shot's own frame in which inner frames are inserted: the mirror, the frame of the door in which, likewise, the painting's own frame is blended. As soon as Frida has completed to cut off her hair, she faces/looks at the painted self, which bears a striking resemblance to its creator. This mutual self-reflexivity reminds the viewer that in the created space of the canvas, the artist has inserted not only the image of the self, but also the setting. Moreover, when Frida's face disappears from the mirror, literally stepping out of the constraints of its initial frame, the painted self's emotive outbreak is shown, as if being in a state of anguish and exhausted by the whole creative process. This transition from one frame into another within the film's own frame or more explicitly, the trespassing between frames makes possible the impossible. Not only the pictorial representation takes on a life of its own, but the medium of cinema also achieves to release the static and frozen composition of the painting into a dynamic and fluid one.

It can further be said that this dramatic ekphrastic scene functions as a way of making visible the character's own state of mind, which otherwise would be invisible (or maybe opaque) to the mind's eye. This state of making visible the invisible is achieved through cinema, while the (re)presentation of the painting is not threatening in any way the sister art; it only modifies and enriches the structure of the film's discourse. What this dramatic ekphrastic scene offers is the character's subjective view of the painting, how she perceives the painting (it seems to be taken in/absorbed by her own vision/perception of the artwork).

Conclusions

The aim of this paper was to stress upon the great variety of occurrence of painting in cinema and to examine the manner in which Kahlo's paintings are (re)presented in Julie Taymor's biopic. To find possible answers to these questions I have chosen to start off by providing different critical and theoretical viewpoints of several scholars about the relationship between painting in/and cinema. We have seen that André Bazin argues against the model of the *paragone*, defending both arts. He also states that the cinema can be considered an "open sesame for the masses" while the paintings belong to the "treasures of the world of art" (Bazin, 1967/2005, 167). He also provides one main difference between the two arts, namely in the context of their framework.

In order to analyse Julie Taymor's biopic in terms of *ekphrasis* the development of the term and the context(s) of its applicability had to be provided. Therefore,

the passage from Homer's *Iliad* provided the starting point of our research where we have seen the first instance of ekphrasis. In the context of the Antiquity the *ekphrasis* was part of the *Progymnasmata* and it was considered to be a rhetorical training exercise by means of which students could develop their oratorical skills and compose and perform valuable speeches. As Ruth Webb pointed out, the ekphrasis in the Antiquity was defined as "A speech that brings the subject matter vividly before the eyes" (Webb, 2009, 1). Sager's insistence upon the applicability of the term and her approach highlighted several features that became quintessential to the modern usage of the term. Murray Krieger and W. J. T. Mitchell's seminal works provide the expansiveness and applicability of the term to different contexts. In modern practice the *ekphrasis* has achieved its status as being "the verbal representation of visual representation" (Mitchell, 1994, 152; Sager, 2008, 13) while its applicability can occur in any medium.

Sager's system of categorization provided the starting point of the movie's analysis. In order to enrich this research with my own 'reading' of Julie's Taymor's *Frida* several climactic scenes had been analysed in parallel with the paintings to which they make reference. The dramatic ekphrasis can be considered as being the most important one among the four mentioned in the second chapter. Within this filmic ekphrasis the paintings *take on a life on their own* and they function as *comments*. This dramatic ekphrasis allows the viewer to simultaneously focus on the representation, both at the cinematic and pictorial level, involving a high degree of self-reflexivity. It can also be concluded that throughout the film the paintings have an important role within the diegesis of the film because they are not only alluded to or reflected on, but they contribute to the progression of the film's narrative.

As regards the relationship between the two art forms it can be said that there is no contest, nor a conflictual relationship between the two arts by the enclavement of the painting and its narrative within the film's narrative; it is rather a complementary and fruitful relation, in which one art form (the cinema) opens up new 'paths'/'doors' in which other art(s) can enter, thus coexisting side by side. In his work entitled *Literature and Cinema*, Boris Eichenbaum talks about the relationship of two other art forms, film and literature, [literature seen as an art form in its broadest sense] in terms of legitimate and illegitimate marriage versus fidelity and infidelity. He also argues that a marriage takes place between the encounter of the two, where the role of the husband is fulfilled by the film (Eichenbaum 1971, 582). To make an analogy to this statement we could say that the relationship between film and painting can be defined using the terms of 'host' and 'guest' in which cinema plays the role of the welcoming guest, in a liminal space where coexistence is made possible.

Film: *Frida*. (2002), directed by Julie Taymor, screenplay by Clancy Sigal, Diane Lake, Gregory Nava and Anna Thomas, based on the book by Hayden Herrera. Cast: Salma Hayek, Alfred Molina, Geoffrey Rush, Valeria Golino, Mia Maestro and Roger Rees.

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Annex



Fig. 1. Duchamp, Marcel
Nude Descending a Staircase, 1912.

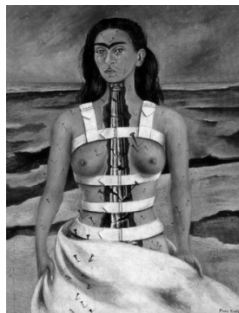


Fig. 2. Kahlo, Frida
The Broken Column, 1944



Fig. 3a. Still-Mirror image



Fig. 3b. Still- Self-reflexivity



Fig. 4a/1. Still- Frida's apartment



Fig. 4a/2. Still- Frame-within-the-frame



Fig. 4b. Kahlo, Frida, *Self Portrait with Cropped Hair*, 1940

SUMMARY

ATVĒRTIE IZGLĪTĪBAS RESURSI – IESPĒJAS UN IZAICINĀJUMI STUDENTIEM

Rita Birzina, Dr.paed.

Atvērto izglītības resursu (AIR) izmantošana augstākajā izglītībā kļūst arvien aktuālāka, tāpēc svarīgi noskaidrot studentu viedokli par AIR izmantošanas iespējām un izaicinājumiem. Veiktajā pētījumā bija iesaistīti 127 Latvijas Universitātes studenti no dažādām fakultātēm. Lai noskaidrotu viņu viedokli par AIR, tika veikts pētījums, izmantojot strukturētu tiešsaistes interviju kvalitatīvo datu ieguvei. Iegūtie dati tika apstrādāti ar kvalitatīvo datu apstrādes programmu AQUAD 6.0, pamatojoties uz autores izveidoto kodu sistēmu, kura balstās uz jaunākajām atziņām par AIR. Savstarpējo saistību noskaidrošanā izmantotas konstruētās saites starp dažādiem kodiem. Iegūtās kodu kategorijas tika transformētas kā kvantitatīvo datu frekvences uz SPSS, nosakot Spīrmena korelācijas koeficientu, tādējādi parādot apslēptās mījsakarības.

Iegūtie rezultāti liecina, ka lielākai daļai studentu nav skaidra priekšstata, kas ir AIR, kaut gan būtībā studijas tie tiek izmantoti. Studentu viedokļi atšķiras atkarībā no viņu studiju līmeņiem. Lai veicinātu personisko izaugsmi, svarīgākais studenta izaicinājums ir, apgūstot datorprasmes, svešvalodas un informācijprasmes, attīstīt informālās mācīšanās prasmes, paralēli formālajām studijām izmantot papildu atvērto izglītības resursus, tādējādi padarot mācīšanos vairāk paš-organizētu un paš-virzītu.

TŪRISMS, PĒTNIECĪBA UN IZGLĪTĪBA

Agita Doniņa, MBA

Tamāra Grizāne, Dr.oec., Assist.Prof.

Tūrisma attīstības prognozes skaidri norāda uz pieaugošu nepieciešamību pēc augsta līmeņa profesionāļiem, kuriem piemīt gan zināšanas tradicionālajās akadēmiskajās disciplīnās, gan 21. gadsimta zināšanas un prasmes. Pētījuma mērķis ir izprast pašreizējos Eiropas izglītības telpas procesus un nepieciešamos uzlabojumus Latvijas tūrisma jomas izglītībā. Izmantota sekojoša metodoloģija: 1) tūrisma un citu sociālo zinātņu jomas zinātniskās literatūras, kas saistīta ar zinātni un citiem tūrisma izglītības aspektiem, analīze. Tas ļauj izprast tūrisma kā nozari, kā arī tūrisma pētniecības dažādus aspektus; 2) iepriekš ar tūrisma izglītību saistīto pētījumu analīze.

Pētījumā pievērsta uzmanība izglītības politikas īstenošanai; tūrisma nozares izpratnei un darba tirgum tūrisma, kā arī augstākajai izglītībai tūrisma. Galvenais secinājums – Latvijas augstākās izglītības sistēmas pievienošanās Boloņas deklarācijas principiem veicina akadēmiskās un profesionālās izglītības savstarpēju sasaistīšanos, tādējādi pievēršot papildu uzmanību otrā līmeņa augstākās izglītības ieguvēju nodarbinātībai, konkurētspējai un darba devēju viedoklim par tiem.

SOCIĀLĀ KAPITĀLA IEZĪMES KRIEVIJĀ

Galina Karpova, Dr.habil., Prof.
Natalija Spiridonova, PhD, Assoc.Prof.

Sociālais kapitāls mūsdienās ir sociālās attīstības un sabiedrības integrācijas svarīgs rādītājs. Ieguldījums sociālajā kapitālā ir ekonomikas drošas funkcionēšanas priekšnosacījums, un tas nosaka sociālā un ekonomiskā progresa kvalitāti un tempu. Sociālais kapitāls ir pētīts attiecībā uz institucionālo sistēmu un sabiedrību ar tās sociālo infrastruktūru.

Tiek raksturotas valsts ģeogrāfiskās iezīmes, sabiedrības etnolingvistiskā sadalījuma līmenis, kā arī skatīti kultūras un vēsturiskie faktori, kas ir svarīgi priekšnosacījumi darba tirgus institucionālās vides veidošanai un funkcionēšanai.

Krievija būtiski atšķiras no Eiropas valstīm tās ģeogrāfijas, iedzīvotāju sadalījuma un infrastruktūras nevienmērīguma ziņā, ietverot arī institucionālo aspektu. Raksta mērķis ir analizēt attiecības starp sociālo vienotību, institūcijām un ekonomisko izaugsmi, izmantojot ekonometriskās modelēšanas metodes. Veiktās analīzes rezultātā tika konstatēts, ka, izmantojot ekonometrisko modelēšanu, būtiska sakarība starp institucionālo makrovīdi, tās kvalitāti un tādiem faktoriem kā etnolingvistiskā sadrumstalotība un ģeogrāfija var noteikt institucionālās makrovīdes līmeni. Institucionālās vides ietekme uz ekonomisko izaugsmi ļauj uzskatīt sociālo kapitālu kā ražošanas faktoru un resursu, kā nacionālās bagātības daļu.

DAŽĀDU VALSTU AKADĒMISKĀ PIEVILCĪGUMA SKAIDROJUMS UN TĀ NOTEIKŠANA

Joanna Kosmačevska, PhD
Mariuss Barčaks, PhD

Raksta galvenais mērķis bija noteikt neatkarīgos mainīgos, kas skaidrotu ienākošās mobilitātes atkarīgo mainīgo lielumu Višegradas grupas četrās valstīs. Tika analizēti piecu gadu (2008–2012) statistiskie dati. Lai pārbaudītu hipotēzes, tika izmantots Spīrmena korelācijas koeficients, kā arī veikta dispersijas analīze, *post-hoc Tukey* tests. Iegūtie rezultāti parādīja, ka nepastāv viena precīza mainīgo lielumu kopa, kas varētu izskaidrot katras no Višegradas valstu grupas uzņemošās valsts akadēmisko pievilcīgumu. Turklāt pastāv statistiski svarīgas atšķirības starp Višegradas grupas valstīm attiecībā uz to pievilcīgumu ārzemju studentiem, ko raksturoja arī ienākošā mobilitāte. Raksts būtiski papildina literatūru, kurā pētīti nacionālā akadēmiskā pievilcīguma nosacījumi.

TŪRISMA UN VIESMĪLĪBAS SEKTORA DARBINIEKU NODARBINĀTĪBAS PRASMJU VEICINĀŠANA EIROPĀ

Ineta Luka, Dr.paed., Prof.

Mūsdienās tūrisms ir kļuvis par vienu no lielākajām un straujāk augošajām tautsaimniecības nozarēm pasaulē. Lai nodrošinātu izcilu servisu viesiem, viesmīlības sektorā būtiska loma ir kvalitatīviem darbiniekiem. Tādējādi īpaši svarīgas šajā procesā ir atbilstošas nodarbinātības prasmes. Iepriekš veiktie pētījumi īpaši izceļ tādas nodarbinātības prasmes kā problēmrisināšana, spēja strādāt komandā, līderība, saziņa svešvalodā. Šis pētījums tika veikts ES Erasmus+ projekta "Eiropas Savienības viesnīcu darbinieku galvenās prasmes" ietvaros. Pētījuma mērķis ir analizēt nozares vajadzības un valodu pedagogu viedokli par valodu mācīšanu viesmīlības industrijas darbiniekiem Eiropā, lai izveidotu mācību kursu, kas veicinātu tūrisma speciālistu nodarbinātības prasmju veidošanos, izmantojot integrētu valodu mācīšanās pieeju. Šis pētījums analizē partnerinstitūcijās veiktās 85 valodu pedagogu aptaujas rezultātus un 131 viesnīcu un ēdināšanas uzņēmumu vadošā līmeņa vadītāju veiktās aptaujas rezultātus. Aptaujā tika izvēlēti tie uzņēmumi, kuros studenti veic mācību praksi. Pētījums veikts, izmantojot jaukto pētījuma metožu pieeju – kvantitatīvo un kvalitatīvo datu ieguvu un analīzi. Pētījuma rezultāti uzsver komunikācijas prasmju, sadarbības prasmju un spējas strādāt komandā nozīmīgumu. Valodu pedagogi īpaši izcēla starpkultūru kompetences nozīmi. Pētījuma rezultāti atklāja katras partnervalsts īpašās vajadzības, kuras ir līdzīgas attiecībā uz angļu valodas kompetenci, bet atšķiras attiecībā uz citām svešvalodām. Pamatojoties uz veiktās vajadzību izpēti rezultātiem, tika izveidots integrēts valodu apguves kurss.

MAZIE UZŅĒMUMI IENĀKUMA NODOKĻU UN SOCIĀLĀS APDROŠINĀŠANAS IEMAKSU MAINĪGAJĀ VIDĒ PĒCKRĪZES PERIODĀ LATVIJĀ

Anna Medne, Mag.oec., Mag.paed., Mag.agr.

Sandra Medne-Jēkabsone, Mag.oec.

Latvijā mazie uzņēmumi sastāda apmēram 98% no kopējā uzņēmumu skaita, nodarbina 47,6% un, līdzīgi kā ES, veido būtisku tautsaimniecības daļu. Mazo uzņēmumu nozīmīgums Latvijas tautsaimniecībā izsauc nepieciešamību veikt analīzi un zinātnisku izpēti, lai izveidotu šo uzņēmumu darbības videi adekvātu nodokļu politiku.

Autores pētījumā izvērtē mazās uzņēmējdarbības ienākuma nodokļu un valsts sociālās apdrošināšanas obligāto iemaksu normatīvo aktu mainību 2010.–2015. gadu periodā. Pētījums ietver šādus nodokļus – Iedzīvotāju ienākuma nodoklis, Valsts sociālās apdrošināšanas obligātās iemaksas, Uzņēmuma ienākuma nodoklis un Mikrouzņēmuma nodoklis.

Globālās krīzes laikā, kad būtiska lejupslīde bija vērojama arī Latvijas tautsaimniecībā, Latvijā tika veikti svarīgi nodokļu pilnveidošanas pasākumi mazajā un vidējā biznesā, no kuriem pozitīvi ir vērtējami Mikrouzņēmuma nodokļa un Iedzīvotāju ienākuma nodokļa diferencēto likmju ieviešana saimnieciskās darbības veicējiem. Autores kā svarīgu un risināmu problēmu izceļ nodokļu nepastāvīgumu un neprognozējamību, kas arī ietekmē ārvalstu investoru iesaistīšanos Latvijas uzņēmējdarbībā. Biežās nodokļu izmaiņas nav pietiekami saskaņotas ar nodokļu maksātāju izpratnes veidošanu par tiem. Latvijā ir sastopama vispār pieņemtajai praksei pretēja pieeja, ka vispirms tiek ieviestas likmju izmaiņas, bet publiskā diskusija sākās pēc tam, kuras rezultātā likmju izmaiņas bieži vien tiek atceltas. Nepieciešams priekšnosacījums turpmāk, veidojot nodokļu likmes, ir savlaicīgi un pamatoti saskaņot nodokļu maksātāju un nodokļu administrācijas intereses.

DŽEIMSA DŽOISA ROMĀNA “ULISS” (ULYSSES) TULKOŠANAS PROBLĒMAS

Tunde Peterfi, BA

Šī raksta mērķis ir apkopot un izskatīt īpašās naratīva metodes un citas valodas īpašības, kas raksturo Džeimsa Džoisa (*James Joyce*) romānu “Uliss” (*Ulysses*). Atkārtota šo paņēmieni izmantošana ir tas, kas liek Džoisa pētniekiem domāt, ka romāns ir netulkojams vai arī, ja tulkojams, tad zaudējot “Ulisa” tulkojumā tās daudzās epifānijas, kas sastopamas teksta oriģinālā. Rakstā galvenokārt skatītas grūtības, ar kurām nenovēršami saskaras tulkotājs – vienalga, kāda būtu mērķvaloda, mēģinot pārtulkot oriģināltekstu savā dzimtajā valodā. Rakstā ietverti arī raksturīgie paņēmieni saistībā ar valodu, tādi kā starpvalodu leksika, plaša stila, noskaņas, perspektīvas un reģistra dažādība, atzīmēto un neatzīmēto citātu, iekšējo un ārējo atsauču, literāro atsauču utt.daudzums.

Šim uzskaitījuma seko secinājums, ka, neskatoties uz šim šķietami nepārvaramajām grūtībām, romānu “*Ulysses*” var tulkot, un tas ir jātulko: pats romāns liek domāt, ka grūtības un izaicinājumi ir jāpieņem un no tiem nav jāizvairās.

ČEHIJAS SKOLU AUTONOMIJAS JĒDZIENS

Jana Polačova Vaštatková, Doc.Mgr., Ph.D., Assoc.Prof.

Mikela Prašilova, Doc.PhDr., Ph.D., Assoc.Prof.

Pašlaik Čehijas reģionālās skolas ir autonomas: tām ir lielas pilnvaras, un vairāk nekā jebkad agrāk tās ir atbildīgas par mācīšanas kvalitāti un kopējo skolu darbību. Raksta mērķis ir, pirmkārt, analizēt pašreizējo procesu Čehijas skolu pārtapšanā autonomā organizācijā, pievēršoties skolu pedagoģiskajai autonomijai un vadošo darbinieku gatavībai īstenot savu jauno lomu, un, otrkārt, raksturot esošo situāciju. Pamatojoties uz Lagerveja izmaiņu pārvaldības modeli (1995), kā arī izmantojot Čehijas izglītības un skolu politikas dokumentu analīzes secinājumus un svarīgu pētījumu rezultātus, kuri attiecas uz Čehijas skolu

pārvaldību, var apgalvot, ka Čehijas skolu pārtapšana autonomā organizācijā jau 10 gadus ir īstenošanas procesā. Šis secinājums apstiprina analizēto pārmaiņu sarežģītību un intensitāti.

GLEZNICĪBA UN KINO: MĀKSLU SAVSTARPĒJĀ SAIKNE UN RAKSTUROJUMS DŽŪLIJAS TEIMORAS FILMĀ “FRĪDA”

Eniko Zidonia Sinka, BA

Mēs visi apzināmies, ka gadsimtu gaitā kino ir guvis ievērojamu iedvesmas avotu literatūrā un ir tapušas izcilas literāro darbu adaptācijas. Taču iespējams, ka mēs līdz galam neapjaušam, ka šī savstarpējā kino un citu mākslu saikne var iegūt jaunu dimensiju, skatot glezniecību un kino to kopsakarā.

Rakstā akcentēta leģendārās Meksikas mākslinieciskās pasaules pārstāves Magdalēnas Karmenas Frīdas Kalo Kalderoni (*Magdalena Carmen Frieda Kablo Calderóni*), kura plašāk pazīstama kā Frīda Kalo, daiļrade, un kā to interpretēja Džūlija Teimora (*Julie Taymor*) savā filmā “Frīda” (2002). Šajā rakstā pētīti neskaitāmie veidi, kā filmā attēlotas Kalo gleznas.

Kā filmā parādītas gleznas? Vai tās tiek tieši parādītas, vai arī uz tām tiek netieši norādīts filmas kontekstā? Kāda ir Kalo gleznu nozīme filmas kopējā stilā? Lai atbildētu uz visiem šiem jautājumiem, tiks analizēta biogrāfiskās filmas par Frīdu Kalo naratīvā struktūra; kulminācijas epizodes tiks analizētas, izmantojot filmas valodu. Svarīgi piebilst, ka šajā analizē tiks skatīta savstarpējā saikne starp glezniecību un kino, izmantojot aprakstu.

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Editor-in-chief: Prof. Dr.paed. **Ineta Luka**,
Turība University, Latvia

Editor: Vice Rector for Science and
Academic Affairs **Ivars Namatēvs**, Turība University, Latvia



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Telephone: +371 67623521

Address: 68 Graudu Street, Riga, LV 1058

E-mail: izdevnieciba@turiba.lv