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SATURS CONTENTS

MŪŽIZGLĪTĪBA LIFELONG LEARNING

Ramune Bagdonaite-Stelmokiene, Vilma Zydziunaite CONSIDERATIONS ON INFORMAL LEARNING: DIFFERENT CONCEPTS AND THEIR DIMENSIONS	13
Dace Brizga IMPLEMENTATION OF PEDAGOGICAL ACTIVITY OF LABOUR PROTECTION SPECIALISTS IN WORK ENVIRONMENT	24
Janina Čižikienė, Audronė Urmanavičienė ADULT LEARNING: TRENDS AND OPPORTUNITIES IN THE ORGANIZATION	35
Artūrs Gaveika PERSONĪBAS ATTĪSTĪBA, IZGLĪTĪBA UN KOMPETENCE KĀ KREATIVITĀTES PAMATELEMENTI <i>Personality Development, Education and Competence as Basic Elements of Creativity</i>	48
Svetlana Koshevenko, Svetlana Silchenkova ИНФОРМАЦИОННАЯ КУЛЬТУРА ОБРАЗОВАТЕЛЬНОГО МЕНЕДЖЕРА: УРОВНЕВЫЙ И ФАКТОРНЫЙ АНАЛИЗ <i>Information Culture of Education Manager: Level and Factor Analysis</i>	58
Gilberto Marzano, Velta Lubkina, Luis Ochoa Siguencia KEY ISSUES IN ADULT NON FORMAL PARTICIPATORY E-LEARNING	69
Arturs Medveckis THE REFLECTION OF PEDAGOGUE'S IDENTITY IN THE LIFE ACTIVITIES: THEORETICAL RESEARCH MODEL	80
Odetā Merfeldaitė, Justina Dilytė COMPETENCES OF SOCIAL WORKERS FOR WORK WITH YOUTH: CASE ANALYSIS	97

Livio Clemente Piccinini, Ting Fa Margherita Chang, Maria Antonietta Lepellere, Mario Taverna, Giovanni Tubaro BAK-SNEPPEN MODELS FOR THE EVOLUTION OF STRUCTURED KNOWLEDGE	109
Tomasz Róžański EDUCATIONAL ACTIVITY OF OLDER PEOPLE IN POLAND – SELECTED ISSUES	122
Ausra Rutkiene, Silva Lengviniene LEARNING AS PRECONDITION TO STAY ACTIVE IN LABOUR MARKET FOR ELDER PEOPLE	132
Luis Ochoa Siguencia, Gilberto Marzano, Renata Ochoa-Daderska EXPERIMENTING PARTICIPATIVE E-LEARNING IN NON- FORMAL ADULT EDUCATION: THE ESCALADE PROJECT	144
Sylwia Szulc THE ROLE OF THE TEACHER AND EIGHT KEY COMPETENCE FOR LIFELONG LEARNING. CASE STUDY POLISH SCHOOL IN REZEKNE	153
Anna Tatarinceva, Ina Gode LIFELONG EDUCATION AS A KEY FACTOR OF THE TRANSFORMATION AND DEVELOPMENT OF THE HUMAN CAPITAL'S POTENTIAL	163
Laima Tomėnienė, Ingrida Baranauskienė ВЗАИМОСВЯЗЬ МАТЕМАТИЧЕСКИХ СПОСОБНОСТЕЙ И ВЫБОРА ТРУДОВОЙ КАРЬЕРЫ <i>Interaction of Mathematical Abilities and the Choice of a Vocational Career</i>	172
Magdalena Urlińska INNOVATIVE USE OF THE POTENTIAL OF CONTEMPORARY SENIORS	183
Irena Zemaitaityte THE ROLE OF LIBRARIES IN PROMOTING ADULT EDUCATION	193

Vaiva Zuzevičiūtė, Laima Ruibytė, Rūta Adamonienė, Aušra Stepanovienė, Birutė Pranevičienė, Rasa Dobržinskienė THE PROBLEM OF USING OPEN EDUCATIONAL RESOURCES IN THE LITHUANIAN LANGUAGE AS A LESS WIDESPREAD LANGUAGE IN THE WORLD	204
--	-----

EKONOMIKA UN SABIEDRĪBAS PĀRVALDĪBA
ECONOMICS AND PUBLIC ADMINISTRATION

Iluta Arbidāne, Madara Tarasova ANALYSIS AND DEVELOPMENT POSSIBILITIES OF BUSINESS INCUBATORS IN LATVIA	215
--	-----

Renata Bilbokaite PROGNOSIS OF VISUALIZATION USAGE IN THE SCIENCE EDUCATION PROCESS	225
--	-----

Līga Brūniņa, Elīna Konstantinova, Aija Peršēvica NECESSITY OF MAPPING AND ASSESSMENT OF ECOSYSTEMS AND THEIR SERVICES IN PLANNING AND DECISION MAKING PROCESS	234
--	-----

Iveta Dembovska, Inese Silicka, Velta Ļubkina EDUCATIONAL TOURISM IN THE TRAINING OF FUTURE TOURISM PROFESSIONALS <i>Izglītojošais tūrisms topošo tūrisma nozares speciālistu izglītībā</i>	245
---	-----

Sandra Ežmale ATTRACTING FOREIGN DIRECT INVESTMENTS: THE CASE OF LATGALE REGION	256
--	-----

Sandra Ežmale EVALUATION OF A LOCAL GOVERNMENT DEVELOPMENT PLANNING: THE CASE OF LATGALE	267
---	-----

Olga Fokina, Inga Millere, Liāna Deklava, Kristaps Circenis DAUGAVPILS ŽĒLSIRDĪGO MĀSU SKOLAS IZVEIDOŠANAS AIZSĀKUMI (1939–1943) <i>Beginning of Daugavpils Charity Sisters' School Foundation (1939–1943)</i>	278
--	-----

Jurgita Ginavičienė, Indrė Sprogytė COMPETITIVENESS OF TRANSPORT COMPANIES IN THE OPINION OF STUDENTS	288
Mirosław Grewiński, Joanna Lizut SOME CASES OF INTEGRATED SOCIAL SERVICES IN POLAND	300
Jekaterina Jefremova FONDĒTO PENSIJU SHĒMU NOZĪME PENSIJU NODROŠINĀŠANĀ: LATVIJAS UN VECO ES VALSTU PIEREDZE <i>Importance of Funded Pension Schemes in Provision of Pensions: the Experience of Latvia and the Old EU Countries</i>	311
Aļona Klodāne UZŅĒMUMU MAKSĀTNESPĒJA: TEORĒTISKS IESKATS UN AKTUĀLĀS TENDENCES LATVIJĀ <i>Enterprise Insolvency: Theoretical Insight and Current Trends in Latvia</i>	323
Inta Kotane PRACTICE OF SMALL AND MEDIUM-SIZED ENTERPRISE PERFORMANCE EVALUATION IN LATVIA	335
Vilmante Kumpikaite – Valiūniene, Ewa Rollnik-Sadowska, Ewa Glińska EDUCATION AND FUTURE WORK ATTITUDES OF STUDENTS IN POLAND AND LITHUANIA: A COMPARATIVE ANALYSIS	345
Lienīte Litavniece, Inese Silicka VIETĒJĀS IDENTITĀTES PĀRTIKAS PRODUKTA NOVĒRTĒJUMS GASTRONOMISKĀ TŪRISMA ATTĪSTĪBĀ RĒZEKNES PILSĒTĀ UN NOVADĀ <i>Evaluation of Local Identity Food in the Development of Gastronomic Tourism in Rezekne City and County</i>	355
Iveta Ludviga, Irina Senņikova, Agita Kalviņa TURNOVER OF PUBLIC SECTOR EMPLOYEES AND THE MEDIATING ROLE OF JOB SATISFACTION: AN EMPIRICAL STUDY IN LATVIA	364
Odeta Merfeldaitė, Justinas Sadauskas EXPECTATIONS IN RESPECT OF THE SUPERVISOR'S IMAGE: THE LITHUANIAN CASE	379

Iveta Mietule, Vitalija Skėruvienė, Iveta Ubrežiova, Daina Znotiņa LEGAL AND FINANCIAL WORK ASPECTS OF ACADEMIC STAFF IN LITHUANIA, SLOVAKIA AND LATVIA <i>Akadēmiskā personāla darba tiesiskie un finanšu aspekti Lietuvā, Slovākijā un Latvijā</i>	391
Iveta Mietule, Anda Zvaigzne, Aija Čerpinska IEDZĪVOTĀJU AKTIVITĀTES UN EKONOMISKĀS ATTĪSTĪBAS NOVĒRTĒJUMS VRG TERITORIJĀ <i>Assessment of the Activity of Residents and Economic Growth in the Lag Territory</i>	400
Līga Mirlina KOMUNIKĀCIJAS ATTĪSTĪBA LATVIJAS VALSTS PĀRVALDĒ: IZMAIŅAS UN IZAICINĀJUMI <i>Development of Communication in Latvian Public Administration: Trends and Challenges</i>	411
Andris Petersons, Ilkhom Khalimzoda COMMUNICATION MODELS AND COMMON BASIS FOR MULTICULTURAL COMMUNICATION IN LATVIA	423
Agnieszka Rymsza MAIN CHALLENGES AND OPPORTUNITIES FACED BY THE NONPROFIT SECTOR IN CURRENT POLAND	434
Ruta Šneidere, Inga Būmane MAZĀS UZŅĒMĒJDARBĪBAS ATBALSTA POLITIKA LATVIJĀ <i>Small Business Support Policy in Latvia</i>	448
Ērika Žubule, Lūcija Kavale VALSTS SEKTORA DARBĪBAS EFEKTIVITĀTES IZVĒRTĒŠANAS IESPĒJAS <i>Evaluation of Efficiency in the Public Sector</i>	463

MĀKSLA UN DIZAINS
ART AND DESIGN

- Vytautas Gudonis**
THE HEALING OF BLINDNESS IN APOCRYPHAL BOOKS AND
THE FINE ARTS 477
- Andra Irbīte, Aina Strode**
DESIGN THINKING MODELS IN DESIGN RESEARCH AND
EDUCATION 488
- Natalja Losāne, Diāna Apele**
KORPORATĪVĀS IDENTITĀTES DIZAINS – TEORIJĀ UN
PRAKSĒ
Corporate Identity Design in Theory and Practice 501
- Arturs Medveckis**
IDENTITY OF KĀRLIS RŪDOLFS KREICBERGS
IN HIS LIFE 512
- Rita Spalva**
DEJAS DRAMATURĢIJAS LIKUMI UN TO LIETOJUMS
KOMPOZĪCIJAS APGUVES PROCESĀ
*Principles of Dramaturgy of Dance and Their Usage in the Process of
Studying Composition* 525
- Gatis Strads**
AKTIERMEISTARĪBAS PEDAGOGU DARBĪBAS VĒSTURISKĀ
ATTĪSTĪBA LATVIJAS TEĀTROS
*Drama Mastership Pedagogues Activities' Historical Development at the
Theatres of Latvia* 533

MŪŽIZGLĪTĪBA
LIFELONG LEARNING

CONSIDERATIONS ON INFORMAL LEARNING: DIFFERENT CONCEPTS AND THEIR DIMENSIONS

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Abstract. The definition of “informal learning” is ambiguous and thus distinguished by the diverse interpretations. The article aims to reveal identical learning dimensions (process, activity, context, interactions and outcomes), which set up different concepts of “informal learning”. The research question refers to the content of dimensions for distinct concepts of “informal learning”. The analysis has disclosed the “informal learning” to be continuum between “self-directed learning”, “self-regulated learning”, “self-managed learning”, “experiential learning”, “incidental/accidental learning”, “situated learning”, “learning through socialization” or “tacit learning”. Those diverse types of “informal learning” supplement each other rather than compete against. Learning intention, process and context setting might be manifested in distinct degrees, however, “informal learning” may refer to the construct covering learning forms, activities and acquired learning outcomes supplementing each other.

Keywords: comparison, dimension, informal learning, literature review.

Introduction

Informal learning is perceived as conscious and/or unconscious, casual / random and not intentionally planned and more or less in advance organized action that refers to acquisition of learner’s competences (Schugurensky, 2000). This learning form might be applied both at individual and group level, thus referring to diverse social interactions. Yet there are still a lot of misapprehensions referred to identification and definition of *informal learning* conception. As *informal learning* owns many different definitions that overlap each other, the important discussion should cover diverse definitions and types of *informal learning* specifying identical learning dimensions (Carliner, 2013). It is important to research the limits distinguishing diverse conceptions of *informal learning*.

Some authors identify *informal learning* as *self-directed learning* (Livingstone, 2001; Tough, 2002) or *experiential learning* (Gola, 2009). Schugurensky (2000) provides typology of *informal learning* based on the two main categories: *learning intentionality* and *conscience*. This researcher suggests to distinguish the informal learning into three types: i) *self-directed*

learning, ii) *intentional learning* and iii) *learning through socialization*. Gola (2009) and Marsick (2009) describe *informal learning* by originating it from *experiential learning*, *incidental learning*, *self-directed learning* and *tacit learning*. Duguit and Schugurensky (2013) point out informal learning to be *self-directed*: i) *intentional and conscious*; ii) *incidental* – unintentional though conscious; and iii) *tacit learning* – unintentional and unconscious. Pintrich and Zusho (2002), Cunningham (2010), Jossberger (2010) and Morgan (2013) distinguish *self-regulated* and *self-managed* types of informal learning. Lave and Wenger (1991), Chaiklin and Lave (1993) mark out *situated learning* as one more type of *informal learning*. With the reference to *informal learning*, the following learning types are closely linked: *self-directed learning*, *self-regulated learning*, *self-managed learning*, *experiential learning*, *incidental / accidental learning*, *situated learning*, and *learning through socialization*. Thus, the article analyses namely those *informal learning* types that cover differences and overlaps of definitions.

The conception of *informal learning* lacks the systemic approach and validation answering the questions *why*, *where*, *when*, *how* and *what* is being learnt referring to *informal learning* (Straka, 2004). Thus, *informal learning* conceptions may be analysed revealing learning activities, processes, contexts, the places it occurs, interactions being active and outcomes (Marsick, 2009).

Different research outcomes are focused on the general features of *informal learning* process, whereas concepts in use are not explained precisely. Thus, it is difficult to perceive whether different *informal learning* concepts are diverse and where this diversity or overlaps occur? Consequently the *research question* is raised: What is the content of dimensions referring to diverse *informal learning* concepts?

The aim of the study was to disclosure of identical dimensions that compile diverse *informal learning* concepts.

The different types of ‘informal learning’ and their dimensions

Different authors (Straka, 2004; Marsick, 2009) highlight the lack of distinction of *informal learning* concepts in regard to the main learning dimensions: *how*, *where*, with *whom / what* and *which* are being learnt. Thus, the main *informal learning* types – *self-directed learning*, *self-regulated learning*, *self-managed learning*, *experiential learning*, *incidental / accidental learning*, *situated learning*, *learning through socialization* – are analysed referring to the main five learning dimensions: process, activity, context, interactions and outcomes (see Table 1).

Table 1 **Informal learning types and their dimensions**

Informal Learning Type	Process	Activities	Context	Interactions	Outcomes
Self-directed learning (Schugurensky, 2000; Livingstone, 2001; Lin and Lee, 2014)	Conscious; Intentional; Structured	Action activities: learning by doing; Cognitive activities: self-control, reflection; Interaction activities: conversations	Diverse, anticipated by learner environment: daily environment, work environment	Individual learning (without educator, tutor); Interpersonal interactions: with associates, resource person	Acquired specific, the most requested/ lacking knowledge and skills necessary for solving real world issues; Personal development
Self-regulated learning (Zimmerman, 1990; Pintrich and Zusho, 2002; Jossberger, 2010; Morgan, 2013)	Conscious; Intentional; Structured	Action activities; Cognitive activities: intentional tasks, strategies‘ repertoires, goal setting, self-control, motivation	Diverse, anticipated by learner environment	Individual learning	Obtained information; Competence development; Learning; Personal development: self- improvement, strengthening own strong sides
Self-managed learning (Cunningham, 2010; McConnell, 2013)	Conscious; Intentional; Structured	Action activities; Cognitive activities: learning activities‘ construction, self- control, motivation, reflection	Diverse, anticipated by learner environment	Individual learning	Acquired new knowledge Learning
Situated learning (Lave and Wenger, 1991; Chaiklin and Lave, 1993)	Conscious; Intentional; Structured; Social practice	Action activities: professional and social practice; Cognitive activities: monitoring of higher competence individuals/ groups; Interaction activities: cooperation	Diverse communal (institutional) environment	Interpersonal interactions with higher competence individuals	Acquired competences; New knowledge creation/generatio n
Incidental/accidental learning (Schugurensky, 2000; Marsick and Watkins, 2001; Marsick et al., 2006)	Conscious – through other activities; Unintentional; Unstructured	Diverse unplanned activities; Action activities: task implementation, experimentation; Cognitive activities: sense of organisa- tional culture, mistake awareness, reflection; Interaction activities: conversations, cooperation	Diverse, unanticipated by learner environment: daily environment, work environment, in and outside various institutions	Individual learning; Interpersonal interactions	Acquired new knowledge, skills; Competence development; Self-awareness of learning something unintentionally; Personal development: self- knowledge, appearance of consciousness

Experiential learning (Kolb, 1984; Kolb & Kolb, 2008)	Conscious; Generally unintentional; Generally unstructured	Action activities: diverse experience; Cognitive activities: investigation, reflection, formulation of new concepts; Interaction activities: diverse experience of interpersonal experience	Diverse, generally unanticipated by learner environment	Individual learning Interpersonal interactions	Acquisition of new experience conceptions/ constructions
Learning through socialization/ tacit learning (Schugurensky, 2000)	Unconscious; Unintentional; Unstructured	Daily activities: action, cognitive, interaction activities	Diverse, unanticipated by learner environment: daily environment, work environment, various institutions	Diverse interpersonal interactions	Internationalization and change of values, views, behaviour, skills; Unintentional learning

Process

Learning process covers the particular characteristics that are specific for each *informal learning* type, namely consciousness, intentionality and the structure. Characteristic of *consciousness* is significant for *informal learning* as individual should consider, anticipate, plan and reflect on the own learning process. The consciousness is expressed in *self-directed learning* (Livingstone, 2001; Lin & Lee, 2014), *self-regulated learning* (Jossberger, 2010; Morgan, 2013), *self-managed learning* (Cunningham, 2010; McConnell, 2013), as well as in *situated learning* (Lave & Wenger, 1991; Chaiklin & Lave, 1993) types. However, other authors refer to opposing concept of *unconsciousness* linking it to socialization. Schugurensky (2000) views *learning through socialization* in the context of daily life, thus not knowing that they learn something while everything flows unconsciously. Consciousness appears when learner views own experience in retrospect and perceives that s/he acquired something through accomplished activities. However, learner should reflect the acquired learning experience consciously and create new experience concepts in order to test them in new situations, as characterized by *experiential learning* (Kolb & Kolb, 2008).

Intentionality is another characteristic of *informal learning* being related to predefined intention of learning (Schugurensky, 2000). Though some authors (Marsick & Watkins, 2001; Marsick et al., 2006) emphasize that *informal learning* may be distinguished by reverse characteristic, namely unintentionality.

Individual does not set the goal in advance with the aim to acquire knowledge and skills. The developed competences as the result of participation in both unforeseen and indirect activities are observed after particular experiential process is over. This is characteristic for both *incidental / accidental learning* and *learning through socialization* when individual does not foresee intentional learning and may not even know that s/he learnt something. Therefore, the latter learning type is also called *tacit knowledge* (Schugurensky, 2000). Kolb & Kolb (2008) referring to *experiential learning* indicate similarly that individual may not anticipate own learning goals. However, it is supposed that this *informal learning* type may cover the aspect of intentionality when the individual intentionally tests and applies new constructed concepts of experience in the new situations.

The *structure* belongs to another characteristic of *informal learning*. It is related to conscious and intentional anticipatory planning of future learning activities, namely how and what will be learnt. This characteristic is proper to *self-directed learning*, *self-managed learning*, *self-regulated learning*, and *situated learning*. Learner oneself considers to be the manager of learning process (Schugurensky, 2000). Here learner's autonomy is disclosed (McConnell, 2013). Following this *incidental / accidental learning* (Schugurensky, 2000) is distinguished as learner does not anticipate learning process in advance or *tacit learning / socialization* (Schugurensky, 2000), *experiential learning* (Kolb & Kolb, 2008) that may occur on a daily basis.

Activity

The *informal learning* is characterized by the following activities: *action activities*, *cognitive activities* and *interaction activities*. All of them overlap each other. Despite the fact that all the types of *informal learning* possess those activity groups, the content provided is different.

Action activities may refer to *learning by doing*, diverse professional and social practices, implementation of various tasks, experimentations, and daily actions. Daily actions are common to every *informal learning* type. Though Schugurensky (2000) mention both *experiential learning* and *tacit learning / socialization* being implemented through various casual activities that are not anticipated and planned in advance. Meanwhile, the authors describing *self-directed learning* (Livingstone, 2001; Lin & Lee, 2014), *self-regulated learning* (Zimmerman, 1990; Jossberger, 2010; Morgan, 2013) and *self-managed learning* (Cunningham, 2010; McConnell, 2013) emphasize conscious anticipation of individual to set learning activities. Lave & Wenger (1991), Chaiklin & Lave (1993) describe *situated learning* and highlight social practice as one more activity of *informal learning*. The aspect of *social practice* is

characteristic for this type, namely all the activities – *action activities*, *cognitive activities* and *interaction activities* – occur in particular social practices.

The *cognitive activities* of *informal learning* cover the learner's reflection, self-control, motivation, monitoring, researching, learning from mistakes and construction of new experience conceptions. The reflection and introspection are highlighted in definitions of *self-directed learning*, *self-regulated learning* and *self-managed learning* (Garrison, 1997; Livingstone, 2001). Those definitions are united by the common characteristic – learner's self-management and self-control mechanism. Thus, referring to *self-directed learning*, *self-regulated learning* and *self-managed learning* the autonomy and initiative of a learner is emphasized, as well as his / her ability to choose learning activities consciously (Pintrich & Zusho, 2002; Loyens et al., 2008). Learner plans and pilots the learning on his / her own, treating it as condition for lifelong self-development. The motivation of learner is also important as a basis of *what*, *how*, and *which* activities are needed to learn (Garrison, 1997). Learning activities might not be planned in advance. Then the individual lacks self-management and control mechanism. This is common for *incidental / accidental learning* (Schugurensky, 2000). However, the reflection of accomplished activities and diverse situation is also very important in order to perceive the acquired value.

The individual learns through diverse social interactions. Still, the accomplishment of activities might be anticipated by learner in advance (characteristic for *self-directed learning*, *self-regulated learning*, *self-managed learning* and *situated learning*) or unanticipated, namely individual has learnt something unintentionally and unplanned during diverse social interactions. This is characteristic for *incidental learning* (Marsick & Watkins, 2001; Marsick et al., 2006) when individual learns something accidentally by communicating with other people; and *experiential learning* or *learning through socialization* (Schugurensky, 2000) when individual learns something through diverse interpersonal experience.

Context

Informal learning might occur in any context. Learning contexts might be anticipated and planned or, on the contrary, unanticipated and unplanned by learner (Pintrich & Zusho, 2002; Cunningham, 2010). Learner might anticipate learning context on his / her own, and such conscious aspect of planning the place might be contributed to *self-directed learning*, *self-regulated learning*, *self-managed learning*, and *situated learning* (Livingstone, 2001). Those contexts might be very diverse and sometimes it is difficult to name them as they are shifted from each other. However, analysing *situated learning* Lave & Wenger (1991), Chaiklin & Lave (1993) define the learning context by focusing on the community or institutional environment. However, it might be discussed

regarding the type of *informal learning* occurrence on a daily basis. Referring to this approach, *situated learning* overlaps with the *learning through socialization*, when learning may occur in both conscious and planned, and unconscious and unplanned contexts.

Learning context might be unanticipated by the individual and this is characteristic for *incidental / accidental learning* or *learning through socialization* (Marsick & Watkins, 2001; Marsick et al., 2006). Kolb & Kolb (2008) discuss about *experiential learning* stating that such learning usually occurs in unanticipated environment. Anyway, when the learner experiences something and due to the reflection creates new concepts of experience, the application of experience causes the anticipated learning context.

Interactions

Informal learning might occur both individually and through interpersonal interactions. Individual informal learning indicates that learner plans and anticipates learning goals on his / her own, then self-regulation and self-control appears while learner evaluates him/herself referring to the different aspects of learning (Zimmerman, 1990). Such characteristics of individual learning are common for *self-regulated learning* (Loyens et al., 2008; Jossberger, 2010) or *self-managed learning* (Cunningham, 2010; McConnell, 2013).

Interpersonal interactions are important in *informal learning*. Those interactions might appear in daily environment, namely family, working place, community, society. Lave & Wenger (1991), Chaiklin & Lave (1993), Marsick (2009) indicate that the *situated learning* is experienced through interpersonal interactions, because knowledge is created when individual participates in a group, community or working environment of higher competence. Significance of interpersonal interaction is perceived in *learning through socialization*, as internationalization and change of values, attitudes, behaviour, and skills occur in daily interpersonal interactions (Schugurensky, 2000).

Both the *individual learning* and *learning through interpersonal interactions* might be chosen consciously. A learner may study individually, then learning may be organized on the basis of personal reflection or communicating with other persons – these are characteristics of *self-directed learning* (Duguit & Schugurensky, 2013). *Incidental / accidental* or *experiential learning* occurs both individually or through interpersonal interactions, though these interactions are not anticipated consciously or planned by a learner him/herself (Callaghan, 1999; Kolb & Kolb, 2008). Thus, different concepts of informal learning may reveal the aspects of both individual and interpersonal interactions, which overlap and therefore are complicated to distinguish.

Outcomes

Learning outcomes might be anticipated and planned in advance (characteristics of *self-directed*, *self-regulated*, and *self-managed learning*). Learner knows exactly the lacking aspects or things important to learn and discover once again (Gibbons, 2002; Lin & Lee, 2004; Cunningham, 2010). Anticipated specific knowledge and skills are requested for solving the problems of real world. Lave & Wenger (1991), Chaiklin & Lave (1993) indicate creation and generation of knowledge rather than obtaining of new knowledge and this is specific for *situated learning* type.

Learning outcomes might be even not planned or anticipated, namely a learner only later realizes that something is learned, acquired some skills and competencies. Due to reflection and communication the individual perceives what was learnt and which learning outcome has been achieved. This is specific characteristic of *incidental / accidental learning* (Schugurensky, 2000). *Learning through socialization* highlights the change and internationalization of values, attitudes, behaviour, skills referring to *unconscious learning*. Learner cannot describe when, where, how and with whom s/he acquired the knowledge, skills, personal development, embedded values and attitudes. All types of *informal learning* are characterized by the common outcome – *personal development of a learner*. *Informal learning* outcomes might be distinguished to *supplemented* and *transformative*. *Supplemented* outcomes complement learner's store of knowledge improving certain skills, developing particular values and enhancing or strengthening existing knowledge, values and attitudes. This means the continuous learning. *Transformative* outcomes acquired during *informal learning* challenge a learner to change radically the existing initial knowledge, values and attitudes. Both supplemented and transformative learning outcomes are characteristics for all types of *informal learning*.

Discussion

Characteristics of informal learning process – consciousness, intentionality and structure setting – are specific for all *informal learning* types, therefore various overlaps are observed while applying them. The consciousness covers not only anticipated, measured, planned learning, but the personal reflection on acquired learning experience as well. In this case of *learning through socialization* cannot be assumed as entirely unconscious learning, which is prescribed for *informal learning* type. Referring to the intentionality this learning type represents unanticipated, unplanned and therefore unstructured learning (Schugurensky, 2000). Distinction of intentionality and structure allows to recognise diverse *informal learning* types (Marsick & Watkins, 2001; Marsick et al., 2006). Yet, strict distinction of *experiential learning* and

incidental / accidental learning has no reason as both *informal learning* types allow the individual to perceive that s/he has learnt something referring to the particular indirect or accidental experiences, activities or situations.

Activities overlap in all the *informal learning* types therefore it is difficult to determine in which type of *informal learning* it is dominating. The same activities may serve as a basis for *incidental / accidental learning*, *experiential learning* or *learning through socialization* (Jossberger, 2010; McConnell, 2013; Morgan, 2013; Lin & Lee, 2014). The *informal learning* lacks the personal self-management and control, and learner does not accept the occurring activities as learning (Schugurensky, 2000). The scientists provide different views arguing if informal learning covers implicit (implied, latent) or incidental (accidental, indirect) activities. The authors of this article presume that if a learner reflects on learning experience acquired through other indirect and not anticipated activities, this refers to *informal learning*. Here the outcome – consciously realized new experience, acquired knowledge and skills. Though individual is not able to tell how and when s/he has learnt particular things, and the learning outcomes and personal development are always noticed and considered.

Context of *informal learning* is described with differently, as it may appear at working place, family, while browsing internet, reading books or reflecting on acquired experience. Even if individual anticipates and plans learning context for *self-directed learning*, *self-regulated learning*, *self-managed learning*, *situated learning* (Livingstone, 2001), the same context may serve as a platform for other types' *informal learning*. It is difficult to identify the content of context as *informal learning* dimension in each informal learning type, because the different learning contexts overlap and extend each other.

Identifying interactions it is recognized that *informal learning* might occur individually or by interacting. Though Pintrich & Zusho (2002), Loyens et al., (2008) McConnell (2013) emphasize the individual learning while discussing about *self-regulated learning* and *self-managed learning*. However the authors of present article presume that learning types being mentioned might occur by experiencing various social interactions. Though importance of interactions is emphasized in *learning through socialization* (Schugurensky, 2000) or *situated learning* (Marsick, 2009), yet individual has to reflect diverse social experience personally in order to perceive the own learning outcomes.

During *informal learning* it is difficult or almost impossible to set learning outcomes precisely as *informal learning* is affected by many factors. Gibbons (2002), Lin & Lee (2004), Cunningham (2010) talking about *self-directed*, *self-regulated*, and *self-managed learning* emphasize the learner's intentions to anticipate learning outcomes in advance. However after some time it might be observed that even unplanned or unanticipated knowledge was obtained.

Conclusions

Informal learning concept is ambiguous and thus distinguished by the diverse interpretations. This is a broad concept incorporating diverse learning processes, activities, contexts, interactions and outcomes. It is difficult to present definitions of homogeneous *informal learning* being influenced by the diverse attitudes and historical contexts as this concept, as well as overlaps and detachments of definitions of diverse *informal learning* types are changing.

Informal learning occurs in every life and learning situation referring to educational institutions, working environment, family, leisure time. It has been influenced as well by the fact that the particular learning part occurs unconsciously when the learner does not recognize particular competences to be achieved. Informal learning might be unanticipated, self-managed, intentional and planned. It covers both individual processes (informal learning at home, working environment) and social processes (informal learning in communities or contexts of social activities).

However, *informal learning* might be considered as continuum between *self-directed learning*, *self-regulated learning*, *self-managed learning*, *experiential learning*, *incidental/accidental learning*, *situated learning*, *learning through socialization / tacit learning*. The diverse types of *informal learning* supplement each other rather than compete against. Learning intentionality and process or context setting might reveal at distinct degrees, yet *informal learning* is considered to be the construct that covers supplementary learning forms, activities and outcomes.

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IMPLEMENTATION OF PEDAGOGICAL ACTIVITY OF LABOUR PROTECTION SPECIALISTS IN WORK ENVIRONMENT

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Abstract. Human health and wellness are significantly affected by the observance of labour and civil protection rules both in the work environment and in social life. They are also affected by adequate training which is organised according to the age group and situation in order to reduce the formal attitude to the observance of all types of safety rules. Labour protection specialists themselves will be those who will respect and ensure the observance of the labour and civil protection rules. The aim of this study was to research the implementation of pedagogical activities of labour safety specialists in the work environment. The methodologies used in the research were semi-structured interviews, questionnaires and the analysis of the qualitative data and comments, submitted by labour protection specialists electronically, to clarify the implementation of pedagogical activities in the context of the UNESCO concept of sustainable development of education with the aim to reduce formal attitude towards the observance of labour and civil protection rules, using the model of ecological approach - Process–Person–Context–Time. The text analysis was carried out using the software programme Weft QDA. By improving labour protection specialists' pedagogical competence, the staff's (employers', employees') expertise also improves or partially improves.

Keywords: competence, learning, labour protection specialist.

Introduction

Human health and wellness are significantly affected by the observance of labour and civil protection rules both in the work environment and in social life. They are also affected by adequate training which is organised according to the age group and situation in order to reduce the formal attitude to the observance of all types of safety rules.

The competence of labour protection specialists (LP programme students – adults having master's or bachelor's degree in some other sector of the economy) is influenced by being present in different environments, since the environment is physical, social, spiritual and informative surroundings where these specific environmental aspects are in constant interaction. In these relationships the physical environment is the one made by nature or humans and it is characterised by physical conditions and total amount of spatial objects; social environment – the social environment of an individual's life, relationships

between people, their material and spiritual values; informative environment – the total amount of resources and processes which demonstrate the knowledge accumulated and applied by each individual society (Ansone et al., 1999); work environment – the workplace with its physical, chemical, psychological, biological, physiological and other factors which an employee is exposed to when performing the work (Labour Protection Law, 2002), family environment – In the narrow sense of its definition, a family consists of the spouses and their children while they are still part of a common household (Civil Law, 1992, 214). Ecological approach to labour protection specialists ensures the implementation of pedagogical competence in the development of the learning environment of the personnel – organising and conducting classes, managing and ensuring high quality teaching to minimise the opportunities of the formation of a formal attitude. Learning environment includes the physical (place, furniture, lighting, air quality, IT devices, etc.), social (the instructor/teacher, audience) and informative (programmes, instructions, documents, study materials, etc.) environment.

During the practice period in pedagogy and work psychology it is advisable to minimise the formal attitude to the LP and CP (labour and civil protection) and ensure the personnel's (both employers' and employees') wellness (Brizga & Peks, 2014) in the work environment, in order to minimise the number of traumatism and occupational diseases. The personnel's learning and study influence on the development of attitude and development can be evaluated basing on the PPCT system: Process-Person-Context-Time (Bronfenbrenner, 1976, 1977, Brofenbrenner & Evans, 2000, Brofenbrenner, 2005, Brofenbrenner & Morris, 2006), where the most significant are the process, the person and also the context – the formal, informal and non-formal learning environment. Both the process and the context should promote the affective, behavioural and cognitive component of attitude, as well as the development of the function of attitude (heuristic, schematic, attitude as a process), as mentioned in the research conducted earlier (Brizga et al., 2013).

Positive attitude affects the personnel's/individual's results, their improvement with contributions to the study process (in the development and improvement of the work/study environment, in improvement of the quality of instructions and regulations, in the selection of appropriate teaching methods). Pedagogical environment and situations should provide free, creative, effective and purposeful education (Briede & Peks, 1998), but the teacher who is the labour protection specialist in the work environment should not manage but direct education, providing a sufficiently wide scope of aims as well as the possibilities of choices of aims and the ways to achieve them. By evaluating one's own and other people's experience, it is important to change one's attitude and with the correct behaviour influence public behaviour both in the work

environment and in family, since in the UNESCO document, which is related to the platform of environmental education, it has been pointed out that it is necessary to integrate the value-based sustainable development into all study aspects, enabling each individual to assess critically oneself and the society, assuming the responsibility for the development of a sustainable future (ESD Competences UNECE, 2012). Experiential learning is the process of learning through experience, acquiring new experience from the viewpoints of different people and testing this experience in practice – evaluating the existing practice and values. In the process of learning each member of the group is actively involved in sharing his/her positive or negative experience and reflection – knowledge reconstruction takes place (Colin, 2010). Reflective practices show what people really do (Ghaye, 2011) and feedback (positive reviews) helps evaluate and make a bigger effort in changing the existing situation, because: “When trying to improve work and working lives through reflection (of one kind or another), thinking and conversations often get stuck with vocabularies of human deficit, and in so doing fail to unlock the creative potential of those involved” (Ghaye, 2011, 9). In the study process the labour protection specialist has to be able to perceive the learner as an equal partner to develop self reflection and within the framework of “action learning” there is a strong focus on “learning with others and from others” in a learning set, (Hale, 2013), since learning improves the emotional intelligence and those who have learnt to change their way of thinking, attitude and opinions can influence the culture of the organisation and the personnel’s attitude in the problem solving processes (Kramer, 2007), emphasizing the fact that the methodology of “action learning” was first designed by Reg Revans in England more than 60 years ago.

On the basis of the ecological approach to education, “pedagogical competence of labour protection specialists forms in a mesosystem, consisting of two microsystems, i.e. work and education, and it develops in formal and non-formal education as well as during informal learning” (Bertaitis, 2013, 81). The researcher points out that labour protection specialists’ insufficient pedagogical competence in many cases is an indirect cause of accidents, since the necessity for the pedagogical competence was updated only in 2011 when the labour protection specialist’s Profession standard was published.

The education trend of the 21st century is towards Education for Sustainable Development (ESD) with the aim of creating a peaceful and sustainable society in which people are able to realize themselves fully in the economy and society as a whole, where they are able to understand the local problems and see them in a global context. The ESD includes five learning types or pillars „Learning to know”, “Learning to be”, “Learning to live together”, “Learning to do”, “Learning to transform oneself and society” (UNESCO, 2011). The fifth pillar “Learning to transform oneself and society”- to develop

abilities and desire to integrate the sustainable life style in oneself and in the society – is one of the questions to which answers should be found in order to change the formal attitude towards labour and civil protection prevailing in society.

The aim of this study was to research the implementation of pedagogical activities of labour safety specialists in the work environment.

The methodologies used in the research were semi-structured interviews, questionnaires and the analysis of the qualitative data and comments (submitted by email) by work safety specialists to clarify the implementation of pedagogical activities in the context of UNESCO concept of education for sustainable development with the aim to reduce formal attitude towards the observance of labour and civil protection rules, using the model of the ecological approach - Process–Person–Context–Time.

Materials and methods

Both labour protection specialists and the personnel (respondents – within the context of research) employed in different sectors of the economy are adults who “learn to think for themselves rather than act upon the assimilated beliefs, values, feelings and judgements of others” (Mezirow, 2003, 1). That is the way transformative learning may be understood. Learning to decide more insightfully for oneself what is right, good and beautiful is centrally concerned with bringing into awareness and negotiating one’s own purposes and values. The learning was organised basing on J. Mezirow’s transformative learning theory which is based on solving adult problem situations, basing on the existing positive or negative experience, system of values, evaluating them reflectively in a dialogue with oneself or with others, the attitude changes (Taylor, 2007, 2008). The main elements of transformative learning which were initially studied are: individual experiences, critical reflection and dialogue (Taylor, 1998). Carrying out further research, the scientist concludes that holistic orientation, awareness of context and authentic practice are closely related to the previously mentioned elements. The theory is based on the goal oriented changes which develop into two directions – individual growth (evaluation of personal attitude), social and individual growth combined holistically (Mezirow, Taylor 2009). Applying this theory, the specialists who acquire labour and civil protection, basing on the existing experience, form a dialogue and carry out self-evaluation during the learning process, using images, videos, emergency situation analysis, assessment, etc.

To clarify the implementation of pedagogical activity of labour protection specialists in the work environment, using the model of ecological approach - Process–Person–Context–Time, in the beginning, the author of the research

carried out unstructured discussions with labour protection specialists. The aim of these discussions was to clarify how to promote the changes of the personnel's /employees' competences in order to change their formal attitude towards the observance of labour and civil protection regulations. Sixteen labour protection specialists from different enterprises and organisations were involved in the research. Questionnaires and discussions were used in the surveys. The qualitative data and comments obtained in the survey were then/ later electronically submitted by the labour protection specialists to the author of the research. Afterwards, the criteria for assessing changes in the attitudes were prepared.

The author of the research then summarised and analysed the submitted data using Content analysis, applying a free qualitative analysis software application Weft QDA. After getting acquainted with the data required for the research and studying theoretical literature, the following categories were formulated:

Codes	Codes of Categories
improved	The attitude towards labour and civil protection improved.
partly improved	The attitude towards labour and civil protection partly improved.
did not change	The attitude towards labour and civil protection did not change.

In order to ensure anonymity, the names of different enterprises and organisations of the sectors of the economy, where the survey was carried out, were coded with numbers (Table 1).

Results and discussion

In previous research (Brizga & Peks, 2015, 2014, Brizga et al., 2015) it was found that on the whole in society (both in the work environment and outside it, from early childhood) a formal attitude is observed towards labour and civil protection. It has been formed throughout the years and there are several reasons for that. One of these is the opinion – nothing bad will happen to me. People consider that health and life are the most important values, but due to the fast pace of life they forget about it in their everyday routines. Another reason – the interdependence of people's improper behaviour in terms of safety and people's low self esteem which is formed when a working individual is not considered as a value.

Table 1 Opinion about the attitude towards labour and civil protection

Enterprises/organisations	Number of respondents	Attitude towards LP and CP		
		Improved	Partly improved	Did not change
1	67	3	0	64*
2	39	37	1	1
3	69	27	35	7
4	10	10	0	0
5	13	2	10	1
6	15	0	9	6
7	207	0	36	171
8	59	15	24	20
9	22	12	0	10
10	31	0	27	4
11	23	18	0	5
12	86	3	29	54
13	207	36	0	171
14	0	0	0	0
15	23	10	8	5
16	91	0	64	27
Total	962	173	243	546

* An accident (fire) happened in the undertaking and therefore the personnel had a good attitude towards the observance of labour and civil protection regulatory enactments.

One of the ways to minimise the development of formal attitude toward civil and labour protection is life skills education, emphasizing social learning and learning to transform oneself and society (Brizga et al., 2015). To live under healthy conditions an individual in an appropriate social and cultural context needs to reach a balance between free time, the time dedicated to work and activities not related to work. The French researcher Daniellou (Daniellou, 2006) developed the “Health and work transversal process” model, where he emphasized the required science knowledge levels for planning human factor and work environment assessment: the biological level comprises the knowledge of anatomy, physiology, biomechanics, biochemistry and toxicology; the cognitive level includes the knowledge about the physiological system and functions of the entire body to optimise the consumption of energy; at the psychological level the regularities and conformities of people’s behaviour and activities, attitude, capabilities and mental load are assessed. The social level addresses each individual’s and social group’s cultural values and habits.

Having acquired the knowledge, skills and competences at all levels of the study programme “Labour protection and safety”, the labour protection specialists implemented the acquired competence into practice in the enterprises

and organisations. The labour protection specialists realized their intention – to minimize the formal attitude towards labour and civil protection which prevails in society and also to improve pedagogical competence. The results of the research (Table 1) show that the attitude towards LP and CP has improved or partly improved at least in half of the enterprises' and organisations' personnel (respondents) – 416, whereas it has not changed in 546 respondents. The differences are obviously not statistically significant. That was also approved by the hi square test – $p = 0.00$ (Preacher, 2001).

The answers submitted show that an accident or a problem caused by fire in an enterprise/organisation can influence the development of an adequate attitude.

Within the framework of the research the labour protection specialists pointed out the criteria which indicated the changes in attitude:

1. Drawing the employees' interest with visually observed objects – pictures, video and the object itself (e.g. "ladder" in building) turned out to be successful.
2. Minimising formal attitude towards LP and CP (the manager has perceived the importance of psycho emotional risks (e.g., - for social pedagogy specialists). Work in a team (civil servants + employees) joint fire safety training in evacuating children. Cooperation has been achieved between the management and employees.
3. With regard to lifting heavy objects, the employees now are more concerned about the ways to move them and if possible they ask their colleagues to help them – something that has not been typical before. More often auxiliary devices are used. Women more often ask men for helping them lift heavy objects – something what they used to do themselves. The employees start to perceive themselves as a value and part of an undertaking. From the discussions with the employees it can be concluded that there is a desire to think about themselves, their health and create a good and safe environment to work in. The contact between the employees and employers has improved. The employees are happy to come to work. They have the feeling that they are needed because their views are listened to and respected. The employers feel the employees' positive attitude and the problem issues solved by joint efforts lead to positive results which manifest themselves in the amount of work and final result.
4. The number of accidents has decreased.
5. The use of presentations (photos, videos) in the process of teaching improved the understanding about work safety issues (the employees have a deeper understanding of practical training). From the discussions during the training process it was concluded that the study

- programme should be specified, by including the employees' recommendations.
6. The employees' behaviour changed. After the studies, when the survey was carried out it was observed that the employees wanted to find out the correct answers to those questions which were not clear to them, so they had common issues to discuss. Thus the interest arose regarding LP issues. When the discussions started, those who had not sent the questionnaires felt uncomfortable and they did not seem to fit in, therefore they tried to read the questions and understand what the discussion was about.
 7. A greater financial support was obtained from the management to improve the situation in labour protection. The employees had become more active in solving the issues concerning the improvement of labour productivity.
 8. The employees' satisfaction with work conditions improved, when certain equipment was replaced (the organisation purchased ergonomics inventory).
 9. By improving the quality of instructions it was possible to inform the employees about topical issues and those which were not included in instructions (e.g. a common gathering place in a situation when there is an emergency situation – an accident, fire, etc.).
 10. Engaging in discussions, interest about safe work environment, new work techniques which could be achieved by creating an informal atmosphere (arranging a study premises) during training, the possibility for the group members to share their experience.
 11. The employees themselves started to express suggestions with regard to work safety.
 12. The use of individual protection aids has increased.
 13. To reduce burnout syndrome among teachers, a psychologist was hired.

Some data obtained from the labour protection specialists indicate that a partial interest of employees was observed, since the employees failed to show awareness of the topicality and significance of a particular issue. Presumably the employees' lack of interest can be explained by the small number of accidents in an undertaking.

Conclusion

Evaluating the implementation of pedagogical activities of work safety specialists in the work environment and basing on the studies of the relevant

publications and the results of content analysis of the respondents' practice reports, it was found that:

- by improving labour protection specialists' pedagogical competence, the personnel's (employers', employees') competence also improves or partly improves);
- by improving the instructions, instructing and study process, it is possible to influence the formation of a positive attitude;
- further studies on the causes of non-observance of labour protection regulations are especially topical. It is necessary to evaluate the possibilities of improving the development of labour protection specialists' pedagogical competence in educational and work environment as well as outside them in the context of the UNESCO concept of education for sustainable development.

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ADULT LEARNING: TRENDS AND OPPORTUNITIES IN THE ORGANIZATION

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Abstract. *The European Union's education and lifelong learning policy stresses informal learning within the society. The article aims to review the concept of lifelong learning and to analyze opportunities for continuous learning process in organizations. New technologies, innovations in the workplace and professional training encourage employees to improve constantly and awareness of the importance of lifelong learning can help to secure their future in a changing labor market. Research methods applied were as following: literature and document analysis, expert interviews, analysis of the results and interpretation. The article presents a review of scientific literature and research data reveals leaders' approach to employees' willingness to raise their qualification constantly and the organization's opportunities. The survey showed that employers want to have a highly qualified staff meeting the requirements of the organization, but do not always have sufficient funds for professional development.*

Keywords: *adult education, lifelong learning, the organization's activities.*

Introduction

The European Commission emphasizes that in a quickly changing world, life-long learning should be a priority: learning is the essence of employment, economic success and a wholesome community. In order to increase and widen the adults' involvement in life-long learning process, the European Union set a goal of 15 per cent of adults participating in life-long learning. Therefore, it is very important to integrate learning into adults' life. Ensuring adult's life-long learning is relevant because as the society ages, it is forecasted that until the year 2025, the number of elderly people will rise by 15 per cent and the number of economically active people (ages 15 to 64) will decrease by 10 per cent (ES Tarybos...). Life-long learning develops personal improvement and increases economical competitiveness. Employees that are not learning are less productive and susceptible to novelties which makes it harder for them to find a place in the labor market. One of the biggest problems of adults' learning is the compatibility of learning supply and demand and if those learning really find accessible, proper learning services that meet their personal and public needs in the learning market as well as if they are offered required knowledge satisfying

their skills. Also, a learning person always experiences contradiction about the knowledge obtained and skills trained. Therefore, a person starting to learn should be ready and have a particular motivation to learn. Secondly, the person should have the skills and abilities to accept and comprehend the new values of learning and subjects. Although learning skills obtained quite often become a very strong motivation, it is important that the person's education and wish to develop in the organization is valued as well.

In Lithuania, (Laurinavičiūtė, 2001) wrote about the assumptions of adult learning. Janulienė & Veršinskienė (2003) review the efficiency and barriers of adult learning, (Gudalienė - Gudelevičienė & Kaušylienė, 2006) examined the change of education paradigm, from teaching to learning. Abramauskienė & Kirliauskienė (2008) stated that a learning person always experiences contradiction about the knowledge obtained and skills trained. The peculiarities of integration into labor market and life-long learning were also reviewed (Žalimienė et al., 2011). Life-long learning achievement evaluation was analyzed by Laužackas (2005), Teresevičienė et al., (2006), Fokienė & Sajienė (2009), Stasiūnaitienė (2008), Žemaitaitytė (2007), Burkšaitienė & Šliogerienė, (2010) and others. Foreign authors (Baldwin & Ford, 1988) studied the model of knowledge application in practice, (Holton, 1996) distinguished the factors which influence knowledge application in work. Dessler (2001) discussed effective teaching programs for adults, (Boeren et al., 2010), (Dermol, 2012) analyzed the influence of leaders and colleagues on the person learning distinguishing that supervision, support and motivation from leaders and colleagues are fairly important in the organization. Renta-Davids et al., (2014) examined the theory of examples identical to work.

The goal of the article is to review the life-long learning conception and to analyze the possibilities of continuous learning process in organizations. To reach the goal, the following assignments were formed: to define the concept of life-long learning; to review the peculiarities of adult learning process and to analyze the conditions allowing increasing adults' learning motivation in organizations. Qualitative research method was chosen to carry out the empirical research – research of experts' opinion in a form of a structured questionnaire (an interview). The research was carried out by conducting a formal interview, i.e. an interview following questions formulated in advance, all of which were given to the interviewed in the same order. This form of interview was chosen with a strive to find out experts' opinion about the present situation and by comparing answers to reveal the experts' attitude to adult learning motivation and real opportunities allowing people to improve and learn while working in organizations.

The questionnaire consists of a group of questions related with each other, which the questioned experts had to answer. The research was conducted on

October, 2015 in Vilnius, Lithuania. It consisted of the following stages: preparation of research instrument, interview and analysis of research data.

The concept of life-long learning

The European Union Memorandum of Lifelong learning (2000) has spread the concept of lifelong learning in the countries of European Union. The document reveals lifelong learning not only on an economical attitude, but also takes into account the citizens' employment possibilities, striving to train their abilities, civil education and involvement into social activities. The Memorandum describes the learning person's equal opportunities to improve in the process of learning. The memorandum distinguishes the following main theses: 1) skills and main abilities are for everyone, which means that every individual should acquire and master such skills and abilities which would allow to properly entrench in public and social life, created conditions to improve; 2) it should be invested into human resources as much as possible by creating a more flexible financing system, thus attracting individuals to improve; 3) novelties should be implemented in learning and teaching to attract more people for educative purposes, also to apply various methods and forms in the process; 4) learning should be evaluated properly, formal and informal ways of learning should have their accreditation systems; 5) consultation and orientation systems should be reviewed and with the help of consultations in particular to make learning more accessible for everyone; 6) lifelong learning conditions should be created close to the learning, in their communities and where possible to implement computer technologies. Thus, lifelong learning in the EU is, was and will be one of the main political means allowing seeking for competitiveness and social cohesion in modern global world economy.

In Lithuania, lifelong learning conception was legitimated in 2004 after approving Lifelong learning ensuring strategy, the "goal of which is to develop comprehensive, integral and high quality lifelong learning system which offers opportunities for versatile education and professional life of all individuals of working age" (Totoraitis & Tarasevič, 2009). The Lithuanian Republic law on education (2006) notes that the purpose of Lithuania's education is to ensure universal possibility of accessing mandatory education for all citizens of the Republic of Lithuania and foreign citizens who have the right to permanently or temporarily live in Lithuania.

In 2012, Seimas of the Republic of Lithuania approved Country development strategy "Lithuania 2030" which mentions "lifelong learning as one of the main factors ensuring Lithuanian society's readiness for world change and enabling the creation of clever society". "Lithuania 2030" development strategy vision is clever Lithuania. Society must become constantly learning,

solid and active. Every citizen should be responsible, creative and open for changes. Every individual could integrate into national and international society of self-dependent people, thus independently creating one's own success, national culture and advanced economy. Due to this reason, the education system of Lithuania should involve all Lithuanian people into an advanced education society, motivate to constantly improve and purposefully learn, seeking for personal benefit and success for one's country.

All in all, a conclusion could be made that lifelong learning is constant improvement of an individual, which allows him to adapt to modern labor market changes, i.e. both when searching for a job and increasing qualification in the present job. In addition, lifelong learning motivates people to take part in social activity, thus developing new competences.

Adult learning process

Literature highlights that the need of adult learning is influenced by internal and external factors. Internal factors cover individual adult needs in different stages of career, different stages of socialization in an organization. External motive group consists of attestation requirements, organizational competence needs, professional work quality ensuring etc. Also, adult teaching motivation and factors strengthening are important (Barkauskaitė, 2006). Learning process should be coordinated with adult motives which determine their wish to learn, their choice of learning forms. Adult learning organization is based on modern adult education principles and teaching theories (Knowles, 1980): adults are more self-dependent; they are less dependent on other people, are able to create a learning environment; they invoke their experience which influences the determination to learn and value learning; they go over different growth stages which form attitude to learning; adults learn with a goal in mind; if they are forced to learn, it does not mean that they will accumulate the knowledge; adults focus their attention to problems and apply everything they have learned to solve them. According to experiential learning model formed by (Kolb, 1984), an individual with particular experience or having carried out observations and reflecting experience develops abstract theories and conclusions in topics of observations or reflections. Kolb (1984) claims that theoretical knowledge of a learning individual should be closely related to practical competences and real activity. Reflexive experience is important, which consists of the following: formulation of a problem in a situation; problem determination based on accumulated experiences; comprehension of the problem's parts and knowing of the problem's solution. Pierce & Fenwick (2005) discuss adult learning models and distinguish a model of reflexive exploration, which emphasizes the learning individual's personal experience in the learning process: experience is

exchanged, one's practical work, functions are presented etc. The organization of adult learning process differs (Juozaitis, 2006), (Mažeikis, 2007) distinguishes the following adult learning forms: observation/evaluation of colleagues; reflection; study groups, project groups; problem formulation, work research; work lead by an adviser; networks; portfolio of competences; simulation games; participation in forums, debates; computerized learning or learning with the help of video medium. In modern adult learning, experiential learning forms prevail which provide opportunities to obtain experience satisfying the needs of those learning in different stages of improvement.

Learning process covers: the one learning, educator and environment. It should be noted that the conception of an adult as a participant in learning process is changing, because the meaning of self-directed learning is emphasized. Self-directed learning perspective emphasizes that a learning individual can manage the learning process himself: planning, realizing, evaluating. An adult is a self-directed learner who is able to plan and realize learning as one's own lifelong improvement condition (Jarvis, 2001).

The educators role and assignment also changes: educators have to constantly search for new qualitative forms and methods of learning, teach not only fundamental and applied knowledge, but also work methods, problem solving enabling those learning to act in changing situations, create and environment in which learning individuals would be active information receivers and could apply earlier experience and knowledge (Teresevičienė et al., 2004). When creating an educational environment, it is important to follow these main values attention to the one learning, authentic conditions and context, evaluation of the learning individual's experience, use of technologies. Environment is described as a dynamic learning activity space, created and affected by the educator and conditioned by education goal, contents appropriate to the goal, education forms, methods and tools (Jucevičienė et. al, 2010). Speaking of adult learning environments, it is important to ensure possibility to directly and practically test new knowledge and skills, collaborate and learn from colleagues; learning should be analyzed reflectively as well. It is important to ensure proper climate and culture. According to Evans & Mohr (1999), adult learning peculiarities are: learning is an individual process, but works best in a group; learning should provide opportunities for purposive reflection; learning is more successful when adults project their learning process themselves; learning should allow the obtained knowledge to be tested in practical activity. Goldring et al., (2010) distinguish the following adult learning principles: education content should reflect individual needs of those learning in different learning stages; continuous learning applying various experiential learning forms; consistent education content reflecting everyday needs and connection with

workplace; competent educators able to always consult and collaborate, help solve problems, consistent and fair evaluation of competence education results.

In conclusion, adults learn having a set goal in mind, whereas if they are forced to learn, it does not mean that they will accumulate knowledge; adults focus their attention to problems and apply everything they have learned to solve them. It is important that adult learning process ensures a possibility to directly and practically test new knowledge and abilities, collaborate and learn from others; learning should be analyzed reflectively as well.

Organization's influence on learning

When analyzing adult learning perspectives, organization's influence is distinguished, because a person spends the bigger part of his life in an organization (Senge, 1990). Learning is influenced by employers and employees reciprocal relations. It also depends on employers' attitude to continuous learning and organizational culture. Continuous improvement is a goal of every good organization and learning is an assumption of a successful organizational activity. Employees should constantly improve, they should be educated, motivated to work better, flexibly react to clients' complaints, adapt to their needs etc. (Šalkauskienė et al., 2006), because consumers form their opinion on the organization from how the organization's employees serve them and how qualitatively they are able to provide the necessary.

Employee training in organizations is becoming an inseparable part of the strategy. Seeking to provide employees with possibilities to improve, it is mandatory to ensure proper education process which should be consistent, planned and controlled. Dessler (2001) names the following stages of education process which may help to create programs and ensure successful education in an organization: 1) necessity analysis. The goal is to help determine the need of training. In the process of necessity analysis it is sought to find out what employees' skills should be improved, what knowledge should be provided in order to improve the quality and efficiency of their functions. After analyzing employees' characteristics and skills, functions should be divided into separate assignments so that it is possible to concentrate on training how to accomplish them later on. After determining training necessity, results and goals of achievements reached during training are formulated. 2) Design of teaching process, formulation of final teaching goals and choice of methods. If seminars for employees' education are chosen outside the organization or with the help of third party, the programs offered should be familiarized and it should be ensured that the program satisfies the employee's needs, systematic teaching program should be created. All education means, practical and theoretical parts of training should supplement each other, thus forming a systematic teaching

program. 3) Verification of training efficiency. Conducting training may help to see the program's flaws and weak sides. 4) Realization stage. All planned activities take place, training program is conducted. 5) Evaluation and consolidation of training results. When evaluating a training program, attention should be paid to evaluation structure, its creation and determination of results based on which the program will be evaluated. According to Dessler (2001), successful and effective training program can only be created based on consistent steps which cover the evaluation of training necessity, creation of the program, verification, realization and evaluation of the program. If education process planning is approached from a managerial perspective, it is recommended to invoke principles of systematicity, expedience and efficiency. Systematicity manifests when long term education plans are created, they are expanded into specific periods of time and education process is controlled. Education process is expedient when strategic goals of the organization or its subdivisions and needs for employee training are taken into consideration. The problem of efficiency is solved by setting up target employee groups which will require education and by creating programs of methodological and problematical level. Efficiency should ensure a favorable environment for applying new skills and knowledge in the organization. Not only use of competences is important, but also their spread in the whole organization.

In conclusion, it could be stated that employee training in an organization should firstly conform the organization's goals. Organizational leadership that comprehends the importance of employee training could help increase the quality and efficacy of functions carried out by employees and create favorable learning conditions both in the organization and outside it.

Analysis of experts' (leaders') opinion

The aim of in-depth interview was to find out the leaders' opinion on employee self-improvement, their abilities and wish to improve and seek for new knowledge. Leader interview helped to determine the aspects of adult lifelong learning, analyze the possibilities of self-improvement of organization's employees, make clear the tendencies and problems that prevail in organizations. Leaders were ensured of their answers' anonymity, without confronting ethical principles. All informants were acquainted with the goal and use of the research, questions on confidentiality were also discussed. Five leaders of business organizations providing support services (criteria: leadership in business and work experience of management more than three years) were questioned by a questionnaire prepared in advance, which consisted of a group of inter-related questions. Problem questions: What are the possibilities for and employee in your organization to improve? What abilities should employees of

your organization improve? What reasons determine employees' motivation to learn? How much time and effort do employees have to assign for improvement and learning? What are the employees' expectations for the organization when seeking constant improvement?

During the interview leaders indicated the opportunities to constantly improve the employees are provided with: *“our employees work with computer equipment, have to get acquainted and learn how to work with new computer programs”, “after installing new programs, we invite a specialist who introduces the program and trains employees”, “employees are properly prepared for working with new programs, new employees are trained”, “employees always have an opportunity to improve in courses at times convenient for them, but work hours are taken into consideration, a work schedule is created so that courses do not interfere with work process”, “it is very important to improve employees' communicational skills and organizational behavior”, “training constantly take place, seminars and various courses are organized in fields of communication, management and psychology”, “if training is interesting for employees themselves, they take part willingly, express their opinion, I think that such training delivers new ideas”, “organization's employees should constantly train in seminars because it is mandatory for the renewal of license”, “employees willingly go to training courses”*. It was sought to make clear what training is the most common and what abilities employees should improve. The leaders noted: *“employees constantly improve their computer work skills, but it is also mandatory for them to gain skills in communication with clients”, “English language knowledge should be improved, because our organization often has guests from abroad”, “foreigners are also our clients, therefore our employees must know English”, “due to collective being quite big, often interpersonal disagreements between employees emerge, which highly hinders work quality, it would be good to learn how to solve interpersonal conflicts”, “foreign language knowledge should be improved, because seminars are often in English”*.

The analysis of research data shows that when a new employee is hired for appropriate position, education and work experience are taken into consideration, however: *“work experience is not always mandatory, but having work experience makes the possibility of employment higher”, “if there are several candidates to a position, the one with higher work experience and appropriate education is preferred”, “students are hired because they seek education and the majority of them has a wish to earn money as well”, “due to our organization providing physiotherapy services, education in this field is absolutely mandatory for the employee, work experience is desired as well”*.

It is interesting to note that employees' motivation to learn depends on the employee's wish to work better, his efforts and dedication for work: *“it can*

partly depend on education received during years of studies, but it depends more on the employee's position in the organization", "if position in an organization does not require a particular education, motivation to learn may not depend on it", "employees' motivation highly depends on their education, which, of course, provides the employee with a right to work and constantly improve", "without proper education, employees could not provide our clients with any services".

The informants distinguished the employees' wish to learn and improve:

"if the employee shows a wish to learn and improve, we always try to provide him with knowledge he lacks", "we ask employees with more knowledge and higher skills to help others, thus promoting collaboration", "employees may improve their personal skills which are required to accomplish some particular work in the organization", "organization's profit directly depends on the employees' efforts, therefore they should be motivated to seek for perfection, only that way the organization may expect good results and profit", "when providing services for people, it is necessary to spend as much time for improvement in the professional field, because it is a very responsible work, which requires good professional knowledge, which influence organization's success and image". Leaders state that employee's motivation to improve, willingness to work for the good of the company and satisfy one's needs is the most important: *"a person who understands the perspectives of learning is more flexible, more easily adapts to environment and is more motivated to work", "overcomes difficulties and problems easier, is more curious and motivated", "sometimes an employee who worked in a particular field for his whole life has the required knowledge and experience in his work, then he has had enough of learning", "if a person is not interested in the novelties of his field, it is very hard to enforce him to do so and it is an employee we do not tolerate, because the job is too responsible".* It was sought to find out how employees are motivated to learn and using what means: *"when employees have enough knowledge and abilities to accomplish assignments assigned to them, they feel good in the work collective", "there were cases when an employee wanted to cancel employment contract because he felt that he was unsuitable for the job because he did not have the required skills. We sent him to training and now he works very well", "our employees are competent enough, but willingly go to seminars, then exchange experience", "our organization motivates every member of the organization to perceive his wishes, goals, expectations and to link them with organizational goals", "we motivate collaboration, various joint work is organized during training", "there is a common attitude in the organization that it is necessary to learn and improve and to apply the obtained knowledge in practice", "we use various forms of motivation to motivate learning".*

Concluding the analysis of in-depth interview with leaders it can be stated that employees' education and experience is very important. The higher competence the job requires or the higher level leader is hired, the higher qualification and education is expected. Work productivity does not always depend on the employees' education as well.

The leaders questioned mentioned that employee's willingness to work, motivation and wish to improve is very important. The employees of all organizations the leaders of which took part in the survey are constantly training in their field. This was confirmed by the organization leaders. They claim that it is important that employees improve their professional abilities, skills of communication with clients, English language knowledge and skills of communication with each other. We can make an assumption that employee self-improvement is important both for the organization and the employee. All leaders answered positively that the majority of employees are sufficiently motivated to train and seek new competences, but employers would like the employees to train in their workplace or leave their workplace for as little time as possible.

Conclusions

Lifelong learning is a constant individual's improvement which allows the individual to adapt to the changes of modern labor market both when trying to get employed or when raising qualification in the job they are in. Motives of adult learning may be various, both internal and external. Internal motives cover personal striving for improving, gaining new competences which may not always be linked to direct functions of work accomplishment. External motives are various certification requirements, organization's competence needs etc. In the adult learning process the adults rush to apply everything they have learned to solve problems which is why it is important to ensure possibilities to directly and practically test out new knowledge and abilities, collaborate and learn from colleagues. Employee training in an organization should firstly meet the organization's goals. Organizational leadership should actively participate in the training process, i.e. when training programs are created, leaders should observe how they are realized, choose employee training methods etc. The analysis of leaders' in-depth interview revealed that leaders find employees' willingness to work, motivation and wish to improve important. All leaders answered positively that the majority of employees are sufficiently motivated to train and seek new competences, but employers would like the employees to train in their workplace or leave their workplace for as little time as possible.

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PERSONĪBAS ATTĪSTĪBA, IZGLĪTĪBA UN KOMPETENCE KĀ KREATIVITĀTES PAMATELEMENTI

Personality Development, Education and Competence as Basic Elements of Creativity

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Abstract. *The task of modern technologies is not only to reproduce the obtained information, but also to motivate students to new knowledge, competence and creativity in a wider spectrum of a professional sphere. In this article the connection between education, development and competence in creation of a creative individual has been researched. The author comes to the main conclusion that the creative individual is based on the education and personal development throughout their lives through educational competence of teachers, creating individual and professional competences of a modern person as a base for creative personality.*

Keywords: *creativity, innovation, personality, competence, education.*

Ievads

Introduction

Cilvēces progress 21. gadsimtā radījis izaicinājumus meklēt jaunas un radošas pieejas un inovācijas iespējas, lai sekmīgi reaģētu uz globalizācijas radītajiem uzdevumiem, kas arī nosaka raksta aktualitāti. Mūsdienu izglītības tehnoloģiju uzdevums ir ne tikai reproducēt iegūto informāciju, bet gan motivēt studentus uz personības attīstību un jaunām zināšanām, kompetenci un kreativitāti plašākā profesionālās nozares lokā. Darba mērķis ir izpētīt izglītības un kompetenču nozīmi radoša indivīda kā attīstības subjekta veidošanā, pedagoga un indivīda kompetenču saturu kreativitātes kontekstā. Darbā izmantota zinātniskā literatūra, autora teorētiskās atziņas, kas gūtas studiju procesā, piedaloties konferencēs un praktiskā pieredze. Rakstā pielietotas tādas metodes, kā zinātniskās literatūras analīze, loģiski - konstruktīvā, salīdzinošā, analīzes un sintēzes zinātniskās metodes. Raksta autors nonāk pie galvenā secinājuma, ka kreatīva indivīda pamatā ir izglītība un personības attīstība visas dzīves garumā caur izglītības nesēju pedagoga kompetenci, veidojot katra mūsdienu cilvēka individuālās un profesionālās kompetences kā radošas personības pamatu.

Personības attīstības aspekts ***The aspect of personality development***

Attīstības vispārīgas īpatnības atsevišķās realitātes sfērās nosaka sistēmu pašregulācijas līmenis. Tas izpaužas neorganisko, organisko un sociālo sistēmu attīstībā. Noteiktas īpatnības piemīt arī personības attīstībai.

Personības attīstība veido dzīves jēgu. Tas izpaužas darba, pašaktualizācijas un jaunrades vienībā cilvēka darbībā. Personība ir sistēma ar vairākām apakšsistēmām, ko veido dažādas darbības sfēras – profesionālā, sociālā, garīgā un citas. Šķiet, ka par integrācijas pamata kritēriju var uzskatīt cilvēka darbības formu pilnveidi (Никифоров, 2008, 104–105).

Personību veido viņa darbība jaunradē. Tieši tāpēc filoģenēzes (vēsturiskās attīstības) aspektā zemkopība ir augstāka par vienkāršu vākšanu, bet lopkopība - augstāka par medībām. Nav izslēgts, ka tieši tāpēc noziedzība visos laikos bija sociāli nosodāma parādība, jo šī ne pārāk sarežģītā darbības forma objektīvi un neizbēgami ved personības degradācijā (Vedins, 2003).

Personības garīgo vajadzību vidū īpaši izceļama ir vajadzība pēc pašattīstības, kas nosaka tās vai citas personības pašrealizācijas dinamiskās īpatnības. Iespējams, ka ne tikai psihiskās attīstības temps, bet arī ilgums katram no mums ir dabas dots, un šis dabīgais attīstības resurss daudziem cilvēkiem izsīkst ilgi pirms tam, kad rimusi vajadzība pēc fiziskās eksistences. Visbeidzot - ja dabiskā determinācija šajā ziņā tomēr nav absolūta, uz bērna agru attīstību ievirzīto pedagoģisko principu vietā jāstājas nostādnēm, kas orientētas uz pastāvīgu un nekad nerimstošu attīstību.

Neapmierinātība pašam ar sevi ir svarīgākais gribas akta nosacījums, tātad neatņemams personības un sabiedrības progresa priekšnoteikums. Angļu filozofs Džons Loks (1632–1704) šim fenomenam ierādīja darbības motivācijas lomu – vēlmes izraisīts nemiers nosaka gribu. Šajā saistībā viņš savā galvenajā filozofiskajā darbā „Eseja par cilvēka sapratni” rakstīja: „Iestāstiet cilvēkam, cik vien vēlaties, ka dzīves lieliskās ērtības ir labākas par nožēlojamo nabadzību, taču tikmēr, kamēr tas būs apmierināts ar šo nabadzību un neizjutīs tās dēļ nemieru, viņu it nekas neuztrauks, viņa griba nekad nepievērsīsies it nekādai darbībai, kas viņu varētu izvest no nabadzības” (Loks, 1985, 96-97).

Darba mīlestība un vienlaikus pastāvīga neapmierinātība ar padarīto ietveramas formulā – lai būtu īsti apmierināts ar sevi, jābūt pastāvīgi neapmierinātam ar sevi. Laikposms, kurā profesionālās zināšanas samazinās uz pusi, speciālistam nemācoties, pašlaik caurmērā ir pieci gadi. Ar speciālu testu palīdzību amerikāņu psihologi atvasinājuši īpašu motivācijas sindromu – „vajadzību pēc sasnieguma”. Šo vajadzību ieaudzina no mazotnes. Amerikāņu bērnam māca, ka viņam visi jāapsteidz, japāņu bērnam – ka viņš nedrīkst no citiem atpalikt. Pašlaik dzīves panākumu ideja diezin vai var tikt apšaubīta pat

mūsmājās. Atpalikt no laika – tas nozīmē zaudēt sevi laika ritumā, palikt it kā ārpus sava laika. Lai gūtu panākumus dzīvē, visai svarīgi ir uzturēt strauju dzīves tempu. Tas, protams, ir formāls nosacījums, bet tomēr tas ir nepieciešams nosacījums, kas izriet no ikvienas pašorganizēšanās sistēmas dzīvotspējas vispārīgajām premisām, proti – tai jāattīstās pietiekami straujā tempā (Vedins, 1999).

Nevienu īstu problēmu nevar atrisināt tajā pašā domāšanas līmenī, kas bija agrāk, šo problēmu radot. Jāiemācās domāt jaunā veidā. Individuālā līmenī tas notiek, kad cilvēki „iestieg” dzīvē, kas parasti ir ierobežotas domāšanas rezultāts: viņi problēmas novērtē, balstoties uz pieņēmumiem, kuri ir novecojuši. Viņi vēlas pielietot risinājumus, kuri ir bijuši efektīvi pagātnē, atsakoties atzīt, ka, lai kāds arī būtu cēlonis, šīs metodes vairs nedarbojas (Vorens, 2009).

Kreativitāte personības attīstībā *The creativity in personality development*

Dzīve nepārtraukti iesaista problēmu risināšanā. Kreativitāte ir atslēga risinājumam, kā no viena risinājuma nonākt līdz nākošajam, ja tas netika darīts iepriekš (Vorens, 2009). Tas ir jaunu ideju ģenerēšanas akts. Pretēji populārajam uzskatam, kreativitāte nav nekas mistisks. Nav nekādas slepenās receptes. Tās pamatprincips ir divu vai vairāku zināmu ideju kombinācija jaunā veidā, tādējādi radot jaunu, citu ideju. Tam ir nepieciešamas iemaņas, bet šīs iemaņas ir iespējams attīstīt un iemācīties tās pielietot caur izglītību un attiecīga līmeņa kompetenču iegūšanu. Izplatītais uzskats, ka jebkurš cilvēks jebkurā vecumā ir kreatīvs neatkarīgi no kompetencēm un izglītības, bet balstoties tikai uz kaut kādiem dabas vai rakstura dotumiem, ir primitīvs. Cilvēkam vienmēr ir noteiktā līmenī attīstīta zināšanu, rakstura īpašību un motivācijas bagāža, kuru pie noteiktiem apstākļiem viņš var izmantot jaunrades procesā, un šajā jaunrades procesā būtu jāievēro sekojošais:

- problēma jādefinē skaidri un precīzi;
- jāuzstāda konkrēts mērķis, kas ir jāasniedz problēmas risinājumā;
- nepieciešams ģenerēt pēc iespējas vairāk ideju, kur savu efektivitāti ir pierādījusi „prāta vētras” metode;
- no iegūto ideju klāsta jāizmanto viena vai vairākas idejas, iespējams, visdažādākajās kombinācijās, kuras var novest pie kreatīva risinājuma;
- jānosaka rīcības stratēģija un iespējamais plāns, paredzot tā elastīgu izmaiņšanu rīcības procesā (Vorens, 2008).

Pieauguša cilvēka kreativitāti uzskata par apzināti virzītu domu procesu, kurā indivīdi attīstās sociālā kontekstā, lai radītu mākslas darbus, izgudrojumus, nonāktu pie zinātniskiem secinājumiem u.c. (Rumpīte, 2000).

Kreatīvas domāšanas pamatā ir vairākas pārbaudītas metodes:

- „prāta vētras metode, kas bieži tiek dēvēta par „grupas domāšanu darbībā”;
- nepamatota un nepārdomāta kritika nogalina radošu domāšanu;
- daudzas idejas, kuras sākumā šķiet muļķīgas var novest pie prātīga un inovatīva risinājuma;
- visas idejas ir jāfiksē un jāizmanto tālākā radošas domāšanas procesā;
- kopējais vairāku cilvēku radošas domāšanas rezultāts vienmēr būs augstāks nekā individuālais (Hellers, 2000).

Cilvēka radošais potenciāls izpaužas dažādās darbības sfērās. Dažādu spēju kreativitāte galvenokārt tiek novērtēta pēc sekojošiem kritērijiem:

- spējas integrēti saskatīt problēmas jaunā veidā un atbrīvoties no tradicionālās domāšanas saiknēm;
- analītiska spēja saprast, kuru no idejām ir vērts īstenot;
- spēja pārliecināt citus par savu ideju pareizumu un vērtīgumu.

Šajos kritērijos būtībā ir ietverta katra cilvēka personīgā potenciāla attīstība, izešana aiz jau sasniegtā robežas. Tā ir radoša pašrealizācija, cilvēka radoša adaptācija jaunā vidē, jaunos apstākļos, jaunos veidos un ar jauniem līdzekļiem (Vorens, 2008).

Kreativitāte rodas ilgas mācīšanās, domāšanas un gatavošanās rezultātā. Kreatīvo ideju attīstību ietekmē indivīda kompetence, motivācija, emocijas un vide. Indivīdam var būt visi iekšējie resursi, lai domātu kreatīvi, bet bez vides atbalsta šī kreativitāte var arī neizpausties. Vide ir objektu un/vai indivīdu, kā arī to savstarpējo mijattiecību kopums. Ir īpaši jāizceļ izglītības, sociālās, mākslas, kultūras, bilingvālās, etnogrāfiskās u.c. vides ietekme. Turpmāk autors akcentē tieši izglītības lomu kreatīvas personības veidošanā (Kyk, 2008).

Latvijas pētniece Bebre ir pētījusi kreativitātes vides aspektu un apkopojusi vairākas faktoru grupas, kas ietver nosacījumus radošas personības attīstībai, kur kā svarīgākie kreativitāti noteicošie faktori ir pedagogu atbalsts (Bebre, 2012).

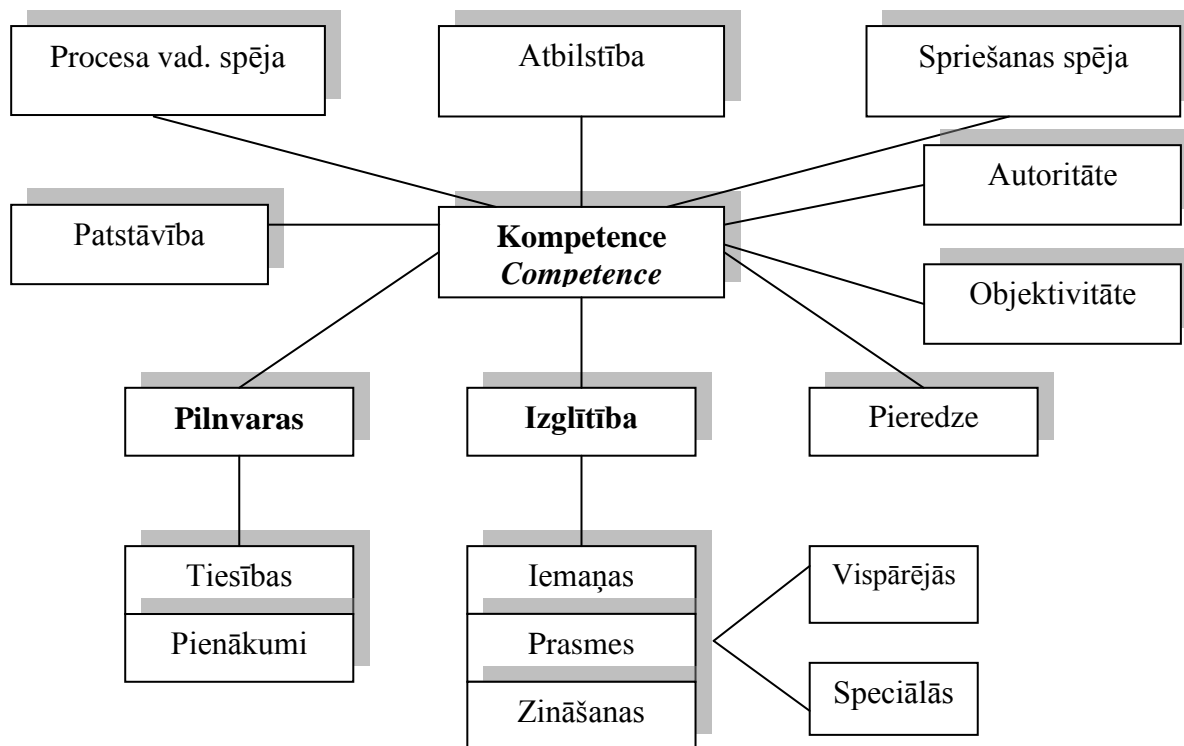
Izglītība un kompetence *Education and competence*

LR Satversmes 112. pants nosaka „Ikvienam ir tiesības uz izglītību” (Satversme, 1922). Izglītības iegūšana notiek saskaņā ar vispārējo Eiropas Savienības un Latvijas Republikas izglītības normatīvo regulējumu – LR Satversmi, Boloņas deklarāciju un Eiropas Savienības normatīvo regulējumu (Boloņas deklarācija, 1999) citiem LR izglītību reglamentējošajiem normatīvajiem aktiem (Izglītības likums, 1998; Izglītības attīstības pamatnostādnes 2007.–2013. gadam, 2006), tā arī ar speciālo normatīvo regulējumu, kas paredz noteiktu kompetenču iegūšanu konkrētās nozarēs.

Ņemot vērā to, ka kompetences jēdziens ir ietverts daudzos normatīvajos aktos, un tas ir tieši saistīts ar mūsdienu cilvēka profesionalitāti un atbilstību augstām prasībām ne tikai savas valsts, bet arī visas pasaules mērogā, nepieciešama šī jēdziena dziļāka izpratne.

Izpētot vairākus zinātniskās literatūras avotus, autors konstatēja, ka pastāv maldīgs uzskats par to, ka kompetence ir tikai ar normatīvajiem aktiem kādai personai noteikto pienākumu un tiesību kopums konkrētā darbības nozarē. Piemēram Latvijas Republikā robežsargiem tiesības un pienākumi ir noteikti kā nacionālajā normatīvajā regulējumā - Robežsardzes likumā, Imigrācijas likumā, daudzajos Ministru Kabineta noteikumos un amatu aprakstos, tā arī Eiropas Savienības normatīvajā regulējumā – Šengenas Konvencijā, Šengenas robežu kodeksā, attiecīgās regulās un citur. Nav šaubu, ka tāda persona nebūs spējīga pilnvērtīgi pildīt tai uzdotos uzdevumus, ja tai nebūs attiecīgas izglītības, pieredzes, autoritātes, uzticēšanās un pilnvarojuma no vadītāju puses, pietiekoša morāles un profesionālās ētikas līmeņa.

No teiktā jāsecina, ka kompetences galvenā un neatņemamā sastāvdaļa tomēr ir izglītība - sistematizētu zināšanu un prasmju apguves un attieksmju veidošanas process un tā rezultāts. Izglītības process ietver mācību un audzināšanas darbību. Izglītības rezultāts ir personas zināšanu, prasmju un attieksmju kopums (Izglītības likums, 1998), (sk. 1. attēls. Profesionālās kompetences struktūra).



1.att. Profesionālās kompetences struktūra
 Fig. 1 The Structure of professional competence

Boloņas deklarācija pamattēzēs noteica, ka Eiropas būvei nepieciešams piešķirt pilnīgāku un tālāksniedzošu saturu, it īpaši balstoties uz Eiropas intelektuālajām, kultūras, sociālajām un tehniskajām dimensijām un stiprinot tās. Zināšanu Eiropa tagad ir plaši atzīta par neaizstājamu augsmes faktoru un par nepieciešamu sastāvdaļu Eiropas pilsonības konsolidācijā un bagātināšanā, tā spēj, vienlaikus ar apziņu par kopīgajām vērtībām un piederību kopējai sabiedriskai un kultūras telpai, sniegt pilsoņiem tās zināšanas, kas nepieciešamas, stājoties pretī jaunā gadu tūkstoša pārbaudījumiem. Pašas izglītības nozīme un sadarbības izglītībā nozīme stabila, miermīlīgu un demokrātisku sabiedrību nostiprināšanā pēdējā laikā ir atzīta par Eiropas Savienības stūrakmeni (Boloņas deklarācija, 1999).

Latvijas Republikas „Izglītības attīstības pamatnostādnes 2007.–2013. gadam”, kas tapa drīzi pēc Latvijas pievienošanās Eiropas Savienībai, noteica – izglītība mūsdienu Eiropā tiek skatīta saistībā ar sabiedrības daudzveidību, cilvēku ekonomiskajām un sociālajām tiesībām, cilvēktiesībām, vienlīdzību un dzimumu līdztiesību.

Arī izglītības procesi vairs netiek uztverti viennozīmīgi. Izglītība mūsdienās nav tikai mācīšana un mācīšanās, bet ietver arī mūžizglītību, mobilitāti, integrāciju, tālākizglītību, jaunradi, pašvērtēšanu un citas jomas. Veidojot demokrātisku izglītības telpu mūsdienu Eiropā, ir nepieciešama sabiedrības atbildība, sociālā kohēzija, spēja mainīties un pilnveidoties. Pašreiz situācija Latvijas un kopējā Eiropas Savienības darba tirgū izvirza prasību pēc mācīšanās un profesionālās kvalifikācijas paaugstināšanas mūža garumā, ko arvien vairāk atbalsta gan valsts, gan darba devēji. Mūžizglītība tiek uzskatīta par Eiropas Savienības valstu politikas stūrakmeni cilvēkresursu attīstības jomā. Informācijas sabiedrībā cilvēku zināšanām un prasmēm ir izšķiroša nozīme augsta labklājības līmeņa sasniegšanai. Mūžizglītība ir izglītība cilvēka mūža garumā. Tā balstās uz iekšēju vajadzību vai ārēju faktoru izraisītu nepieciešamību iegūt un arvien papildināt savas zināšanas un prasmes un būt radošam.

Mūsdienu straujo zinātnes un tehnikas sasniegumu un augstas tehnoloģijas laikmetā formālajā izglītībā iegūtās zināšanas un prasmes noveco arvien ātrāk. Mūžizglītība ar īpaši organizētu gan formālo, gan neformālo tālākizglītības sistēmu sekmē pilnvērtīgu personas attīstību, ļauj cilvēkam veiksmīgāk pielāgoties jaunajām laikmeta un sociālajām pārmaiņām un, nemitīgi paaugstinot savu kvalifikāciju vai pat pārkvalificējoties, nezaudēt darbu (Никифоров, 2008, 104–105).

Arī Izglītības attīstības pamatnostādnes 2014.-2020. gadam paredz, ka globalizācijas, informācijas tehnoloģiju attīstības un vērtību plurālisma apstākļos nepieciešamas kompetences, lai orientētos mūsdienu pasaulē, ko raksturo nemitīgas pārmaiņas. Kompetences, kas ir zināšanu, prasmju un attieksmju

kopums, ir nepieciešamas, lai indivīds varētu pielāgoties mainīgajai pasaulei un izdarīt savas izvēles, vienlaikus ievērojot kopīgas sabiedrības vērtības. Lai veicinātu indivīda izpratības/pratības veidošanos, kas ietver spēju patstāvīgi rīkoties ārpus mācību priekšmeta robežām, risinot problēmas dažādās dzīves situācijās un kontekstos, ir nepieciešama kompetenču pieejā mācību satura, t.sk. mācību metodisko līdzekļu, izstrāde un ieviešana mācību procesā. Mācību satura un metožu pilnveide jo īpaši svarīga ir pamatizglītības beigu posmā un vidējās izglītības pakāpē, lai veicinātu prasmju lietojumu un darba tirgum nepieciešamo prasmju apguvi (Par Izglītības attīstības pamatnostādņu 2014.-2020. gadam apstiprināšanu, 2014).

Mūsdienās cilvēki izglītībai un sevis pilnveidei velta aizvien vairāk laika – teica bijusī izglītības un zinātnes ministre Tatjana Kože, 2009. gada 26. oktobrī, atklājot konferenci „Radoša domāšana un izglītība”, kuras ietvaros notika Eiropas radošuma vēstnieka dr. Edvarda de Bono meistarklase „Radošums kā risinājums mūsdienu izaicinājumiem”. Mēs dzīvojam ļoti dinamiskā laikmetā, un jo īpaši tādēļ mums jāvelta vairāk laika radošai domāšanai. Latvijai, kas gluži, kā lielākā daļa pasaules attīstās zināšanu sabiedrības virzienā, svarīgākais šādas sabiedrības un tās labklājības pamats ir cilvēks (Kože, 2009).

Šāda radoša cilvēka veidošanā kompetentam pedagogam ir izšķiroša loma. Pedagoga (skolotāja) kompetence izpaužas viņa spējās un zināšanās par to, kā veicināt jaunā cilvēka gatavību mūsdienu dinamiskajai dzīvei, un prasmes pakļaut šim mērķim atbilstošu mācību saturu, īpaši organizētu mācību vidi, iespējamo mācību metožu un paņēmienu dažādību, savas personības piemēru un autoritāti.

Pedagoga individuālās īpašības no kreativitātes viedokļa var sargrupēt sekojoši (Артюшкин, 2008, 564-566):

- 1) pedagogs – teorētiķis, kurš lekciju un semināru vadīšanai izmanto lielu mācību materiālu daudzumu attīstot apmācāmajos zinātkāri un profesionālo līmeni;
- 2) pedagogs – pētnieks, kurš praktiski iesaistīts pasniedzamajā sfērā un izmanto plašu praktisko piemēru un ilustrāciju bāzi;
- 3) pedagogs – radītājs, kuram piemīt plašs redzesloks ne tikai pasniedzamajā nozarē, bet arī spilgta individualitāte, harizmātiskums un savdabīga pasaules uztvere.

Prakse liecina, ka studenti gribētu mācīties pie trešās grupas pedagoģiem. Radoši pedagogi spēj stimulēt kreatīvu uzvedību studentos, nosakot inovatīvas mācību materiāla apguves metodes un formas. Augstskolu auditoriju rāmji ir par šauru mūsdienu studentam. Nodarbību vadīšana ārpus auditorijām (iepazīšanās un prakse iespējamajās darba vietās, specializēto objektu apmeklējums, piedalīšanās profesionāla rakstura un profesionālās orientācijas pasākumos) parādīja ne tikai paaugstinātu interesi par jaunām apmācību metodikām un

attīstīja viņos redzesloku, bet arī izmainīja izglītības iegūšanas un personības attīstības motivācijas akcentus. Nodarbību struktūras izmaiņas (studentu prezentāciju sagatavošana, dalība praktisku uzdevumu izpildē komandas sastāvā un tml.) stimulē studentus uz inovatīvu pieeju, pieradina un atraisa viņos kreativitāti jau izglītības iegūšanas stadijā.

Kā inovatīvu izglītošanas metodi studējošo kreativitātes attīstīšanai varētu minēt ikgadējo taktisko mācību organizēšanu Valsts robežsardzes koledžā, kas tiek organizētas ik gadu ciešā sadarbībā ar darba devējiem un ir attaisnojušas sevi ar īpašu efektivitāti un lietderību no vairākiem aspektiem vienlaicīgi:

- 1) studentu teorētisko zināšanu un praktisko iemaņu pārbaude praksē;
- 2) iespēja pārbaudīt un attīstīt savas radošās spējas plašā praktisko darbību un pasākumu lokā;
- 3) attīstīt spēju darboties komandā un aizstāvēt savu viedokli;
- 4) attīstīt spēju vadīt citus apliecinot savu profesionālo kompetenci;
- 5) nepieciešamība meklēt problēmrisinājumus realitātei tuvā situācijā;
- 6) iespēja iejusties izvēlētajā profesijas specifikā;
- 7) iepazīties ar darba devēja pieredzi un inovatīvajām idejām iestādes efektivitātes attīstīšanā;
- 8) attīstīt sevī profesionālo pašcieņu un pārliecību savos spēkos;
- 9) izgaismot profesionālās izglītības trūkumus konkrētos jautājumos un jomās;
- 10) motivēt pedagogus uz inovatīvu pieeju izglītības procesā;
- 11) attīstīt pedagogu profesionālo kompetenci uzturot nepārtrauktu teorijas un prakses saikni;
- 12) taktisko mācību pieredzes noderīgums darba devējam inovatīvu risinājumu meklējumam darbības efektivitātes paaugstināšanai (Gaveika, 2008, 2013).

Secinājumi *Conclusions*

1. Personības attīstība veido dzīves jēgu. Tas izpaužas darba, pašaktualizācijas un jaunrades vienotībā cilvēka darbībā. Personība ir sistēma ar vairākām apakšsistēmām, ko veido dažādas darbības sfēras – profesionālā, sociālā, garīgā un citas
2. Sabiedrība dzīvo ļoti dinamiskā laikmetā un jo īpaši tādēļ jāvelta vairāk laika domāšanai. Latvijai, kas gluži, kā lielākā daļa pasaules attīstās zināšanu sabiedrības virzienā, svarīgākais šādas sabiedrības un tās labklājības pamats ir kompetents cilvēks. Tādēļ, ikvienam izglītībā iesaistītajam svarīgi stiprināt ideju par kompetenci un mācēšanu mācīties. Savukārt, lai mācētu mācīties, nepieciešams attīstīt spējas radoši domāt.

3. Tikai kreatīva izglītība caur kreatīviem pedagogiem var attīstīt kreatīvas kompetences. Radoši pedagogi spēj stimulēt kreatīvu uzvedību studentos, nosakot inovatīvas mācību materiāla apguves metodes un formas;
4. Kreativitāte kļuvusi aktuāla ne tikai radošu profesiju pārstāvjiem. Tā ir neatņemama mūsdienu dinamiskajā dzīvē jebkurā pozitīvajā cilvēka darbības sfērā un tā rodas ilgstošas izglītības (mācīšanās), mūžizglītības, zinātniski metodoloģiskas domāšanas un praktiskās pieredzes uzkrāšanas rezultātā. Kreatīvai personībai ir jābūt zināšanām un kompetencei konkrētā jomā.
5. Ikvienam izglītībā iesaistītajam svarīgi stiprināt ideju par kreativitāti, mācēšanu radoši mācīties. Savukārt, lai mācētu mācīties, nepieciešams attīstīt spējas radoši domāt, spējas pilnveidot un bagātināt sevi, lai ar radošās domāšanas palīdzību padarītu pasauli labāku.

Summary

Creativity appears as the result of continuous learning and deep thinking. Individual competence, motivation, emotions and environment influence the development of creative ideas. Person may have all inner resources to think creatively, but without support of appropriate environment, the creativity may not become apparent. Special attention is paid to the influence of educational, social, arts, cultural, bilingual and other environments. Taking into account that the idea of competence is included in many regulatory enactments and is closely connected to professionalism of contemporary person as well as to correspondence to high requirements not only within home country, but also all over the world, it is important to focus more precisely on the above mentioned idea of creativity. The author of the work has analyzed scientific literature and has stated that exist an erroneous opinion that competence according to regulatory enactments are defined as set of duties and rights in a particular working field.

Without any doubts, the person without appropriate knowledge, experience, authority, confidence, sufficient level of professional ethics and moral is not able to accomplish the given task. From the above mentioned it is clear that the most important and integral part of competence is education – the process of acquiring systematic knowledge and skills; attitude formation process.

The educational process includes training and upbringing activities. The result of education is the set of person's knowledge, skills and attitudes (Education Law, 1998).

We are living in a dynamic century and therefore we have to pay more attention to creative thinking. Latvia as well as other countries is developing towards the knowledge of society, because the basis element of society and prosperity is human being. (Kože, 2009).

Competent teacher plays the determinant role in the formation of creative person. Teacher's competence is shown in skills and knowledge he applies for preparing and developing the contemporary and dynamic person. Pedagogue reveals own skills in the way he chooses the appropriate training contents, specially organized training environment, the variety of methods and techniques.

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ИНФОРМАЦИОННАЯ КУЛЬТУРА ОБРАЗОВАТЕЛЬНОГО МЕНЕДЖЕРА: УРОВНЕВЫЙ И ФАКТОРНЫЙ АНАЛИЗ¹

Information Culture of Education Manager: Level and Factor Analysis

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Abstract. *The article presents the results of a monographic research of information culture of educational manager. The article includes the author's definition of the concept of „information culture of education manager”, the functional model of information culture of educational manager consisting of following components: motivational, normative-valuable, cognitive-operational, communicative, informational, critical, educational and creative.*

The article includes information about level and factor analysis of information culture of educational manager, detection of the main components affecting the information culture of educational manager and their dependence.

Keywords: *information culture, educational manager, information culture of educational manager, components of information culture, levels of information culture.*

Введение

Introduction

В период кризисного развития экономики одним из важнейших ресурсов является «человеческий капитал». Образование является отраслью народного хозяйства, где происходит воспроизводство «человеческого капитала» и качество образования зависит от квалификации управленческих и педагогических кадров на всех ступенях образования.

Образовательный менеджер – это специалист, участвующий в разработке стратегии организации, занимающийся подбором и развитием персонала, построением индивидуальных образовательных траекторий и траекторий карьерного роста сотрудников, организацией их корпоративного обучения с целью развития самой организации. Он должен

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обладать знаниями в области инновационного менеджмента, способностями активировать интеллектуальный потенциал сотрудников, обладать педагогическим мастерством, лидерскими и коммуникативными способностями.

В образовательной организации, как правило, нет отдельной должности образовательного менеджера. Его функции выполняют в некоторой степени руководитель организации, заместители руководителя, работники отдела кадров, руководители структурных подразделений.

Переход к информационному обществу выдвигает новые требования к управленческим и педагогическим кадрам. Весомую значимость приобретает информационная культура образовательного менеджера как фактор, способствующий влиять на показатели эффективности его работы, а значит и всей организации, системы образования в целом.

Высокий уровень информационной культуры (сформированное информационное мировоззрение, критическое мышление, понимание ценности и важности информации, владение информационными технологиями и опыт профессиональной деятельности) способствует снижению рисков при принятии решений, позволяет осуществлять качественное информационно-педагогическое и методическое сопровождение педагогов, формировать эффективную команду единомышленников и осуществлять деловую коммуникацию на высоком профессиональном уровне.

В связи с вышеизложенным, определена цель нашего исследования – определение уровня сформированности информационной культуры у образовательных менеджеров школ: провести уровневый анализ информационной культуры; выделить компоненты информационной культуры, в большей степени влияющие на итоговый уровневый показатель; определить зависимость её компонентов друг от друга (на примере школ г. Смоленска).

Материалы и методы *Materials and Methods*

Методологическую базу исследования составляют работы ученых в области образовательного менеджмента (Бойдела Г., Бургойна Дж., Гютла Б., Иванова Е.В., Ортей Ф., Певзнера М.Н., Педлер М., Петрякова П.А., Третьякова П.И., Федотовой Г.А., Фоскета Н., Шамовой Т.И., Шерайзиной Р.М., Ширина А.Г. и др.) и информационной культуры образовательного менеджера (Гендиной Н.И., Колина К.К., Конюшенко С.М., Кошевенко С.В., Маловидченко С.В., Чекина И.А.).

Так ученые Новгородского государственного университета (Е.В. Иванов, 2010) считают, что образовательный менеджер, во-первых, это руководитель, заботящийся об эмоциональной атмосфере в коллективе, учитывающий интересы разных групп; во-вторых, это аналитик, выявляющий проблемы в развитии персонала организации и ищущий пути их решения; в-третьих, это предприниматель со способностью рисковать, находиться на пике инноваций. Наряду с этим, образовательный менеджер является членом организации, живущим по ее законам, объединяющим и координирующим работу других.

Под информационной культурой образовательного менеджера (С.В. Кошевенко, 2015) понимается совокупность информационных ценностей, знаний, умений, формируемого информационного мировоззрения, а также готовности и способности к творческой самореализации в профессиональной деятельности образовательного менеджера и удовлетворению профессиональных информационных потребностей, в том числе посредством информационных и коммуникационных технологий.

Информационная культура образовательного менеджера, по мнению авторов, должна включать восемь функциональных компонентов: мотивационный, нормативно-ценностный, познавательно-операционный, коммуникативный, информационный, критический, креативный и образовательный (С.В. Кошевенко, 2015; С.В. Сильченкова, 2015).

Для определения уровня информационной культуры образовательного менеджера авторами разработана анкета, в которой каждый компонент раскрывается у респондента через ответы на 5 вопросов. Вопросы позволяют оценить профессиональные качества личности, ее знания, умения, убеждения, ценности и навыки в области информационной культуры. Оценка производится по шестибальной шкале (от 0 до 5), которая имеет следующий вид: 0 – полное отсутствие качества; 1 – низкая степень проявления качества; 2 – степень проявления качества ниже среднего; 3 – средняя степень проявления качества; 4 – степень проявления качества выше среднего; 5 – высокая степень проявления качества.

В результате определяется средний балл по анкете, по которому и судят об уровне информационной культуры образовательного менеджера. Всего выделено три уровня информационной культуры: адаптивный (от 0 до 2 баллов), эвристический (от 2 баллов до 4 баллов) и креативный (от 4 баллов до 5 баллов).

С полной версией авторской методики можно ознакомиться в опубликованных работах (С.В. Сильченкова, 2015; С.В. Кошевенко, 2015; Н.Н. Сазонова, 2015).

Надежность теста составляет в среднем 0,93, что является высоким показателем и говорит о значительной сбалансированности вопросов и достаточной защите теста от случайных факторов.

Для достижения заявленной цели использовались следующие методы исследования: теоретические (изучение и анализ научно-педагогической литературы по проблеме исследования, системный анализ), эмпирические (изучение педагогического опыта, анкетный опрос), статистические (описательная статистика, табличный и графический методы, факторный анализ).

Опрос работников, выполняющих функциональные обязанности образовательного менеджера, проводился в 2015 году в школах города Смоленска. Случайным образом выбрано 26 школ города из 40. Всего опрошено 52 человека, из них директоров – 26 человек, заместителей директоров – 26 человек. Данный объем выборки является достаточным для монографического исследования.

Из всех опрошенных подавляющее большинство составляют женщины – 47 человек (90 %). Средний возраст респондентов составляет 47 лет, средний стаж работы в должности – 9 лет, педагогический стаж – 25 лет, 13 человек (25 %) находятся в пенсионном возрасте (55 лет и старше).

Результаты исследования *Results of research*

В результате обработки полученных данных имеем следующее распределение образовательных менеджеров школ г. Смоленска по уровням их информационной культуры (таблица 1).

Таблица 1. Уровни информационной культуры образовательных менеджеров школ г. Смоленска
Table 1 Levels of information culture of educational managers of Smolensk schools

Уровень информационной культуры	Все респонденты		Директора		Заместители директоров	
	человек	%	человек	%	человек	%
адаптивный	0	0	0	0	0	0
эвристический	14	26,9	8	30,8	6	23,1
креативный	38	73,1	18	69,2	20	76,9
Итого	52	100	26	100	26	100

Данные таблицы показывают, что никто из опрошенных не продемонстрировал адаптивный уровень информационной культуры. Действительно, было бы странно видеть руководителя школы –

образовательного менеджера, который не знает и практически не имеет навыков работы с информацией и современными информационными технологиями.

Большинство респондентов имеет креативный уровень информационной культуры. В целом по всем анкетам таких образовательных менеджеров 38 человек (73,1 %). Средний балл составляет 4,2. Рассчитано среднее квадратическое отклонение – 0,89, коэффициент вариации – 21 %. Поскольку значение коэффициента вариации составляет менее 33 %, это говорит о небольшой вариации исследуемого признака (информационной культуры) и типичности его среднего значения.

При сравнении сформированности компонентов информационной культуры у директоров и их заместителей можно сказать, что они практически идентичны, максимальное различие составляет 0,3 балла для креативного компонента. Причем, среди руководителей количество образовательных менеджеров с креативным уровнем ниже, чем среди их заместителей. Однако, креативный компонент информационной культуры у руководителей выше, чем у их заместителей на 0,3 балла. Это может быть связано с тем, что руководитель образовательного учреждения обычно решает множество вопросов, касающихся всех сфер деятельности организации и уделяет больше внимания решению стратегических проблем, а это требует проявления высокой творческой активности. Заместитель же директора имеет больше возможностей для развития познавательно-операционного, образовательного компонентов информационной культуры: он разрабатывает методические материалы, программы курсов повышения квалификации, планы внутриорганизационного обучения, сам выступает в качестве тренера.

Рассмотрим, на каком уровне сформированы у образовательных менеджеров компоненты информационной культуры (рисунок 1).

Большинство компонентов информационной культуры образовательных менеджеров сформированы на креативном уровне (средний балл 4 и выше). Респонденты показали, что лучше всего у них сформирован мотивационный компонент (4,7 балла), что свидетельствует об их интересе к своей профессиональной деятельности, к применению новых информационных технологий; о ярко выраженной мотивации к достижению результата; о стремлении к самосовершенствованию и самообразованию.

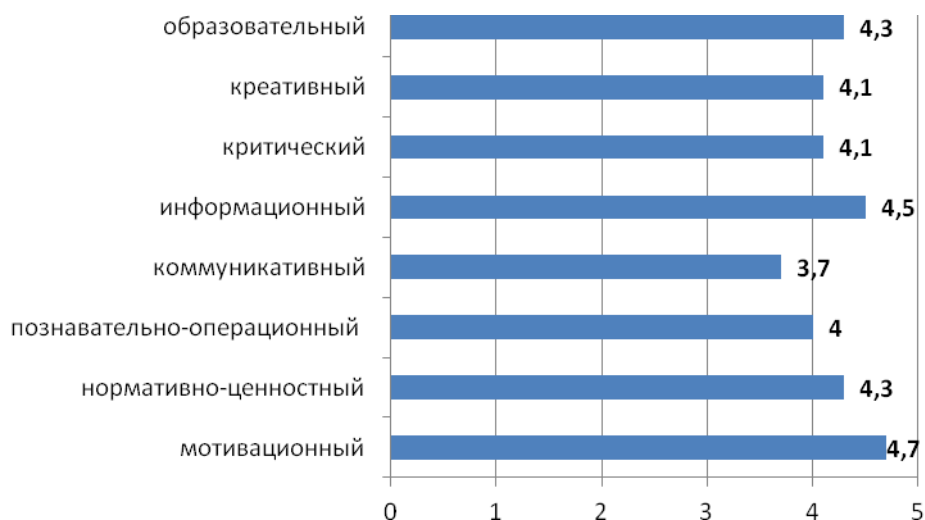


Рисунок 1. Сформированность компонентов информационной культуры образовательных менеджеров

Figure 1 Formation of components of information culture of educational managers

На эвристическом (среднем) уровне сформирован коммуникативный компонент информационной культуры (3,7 балла). Для этого компонента характерна высокая колеблемость ответов респондентов, вариация составляет 42 %, размах составляет от 0 до 5 баллов. Внутренний анализ данного компонента показал, что самый низкий балл (1,3 балла) имеет позиция «Владение навыками деловой коммуникации на иностранном языке». Это самая слабая позиция из всей анкеты.

Также выявлено, что у образовательных менеджеров г. Смоленска следующие позиции в целом имеют баллы ниже среднего уровня:

- 1) понятие об эргономических основах автоматизированного рабочего места и способность организовать его в соответствии с нормативными требованиями – 3,7 балла;
- 2) уровень профессиональных знаний в области образовательного менеджмента и управления человеческими ресурсами – 3,6 балла;
- 3) осознание себя как творческой личности, способной изменить профессиональную среду, окружающий мир – 3,8 балла;
- 4) способность легко ориентироваться в различных предметных областях, используя информационную деятельность (сбор, обработку, хранение, поиск и распространение информации) как интегративное основание любой науки – 3,8 балла;
- 5) готовность к организации научной исследовательской деятельности и оформлению её результатов – 3,9 балла.

При этом позиции 1–3 из этого списка являются значимыми для формирования информационной культуры образовательного менеджера (коэффициенты корреляции Спирмена составляют 0,6–0,7).

Отсюда следует вывод о необходимости повышения соответствующих знаний в области образовательного менеджмента, формирования готовности к исследовательской деятельности и информационно-педагогическому сопровождению педагогов.

Факторный анализ информационной культуры показал, что наиболее значимыми для её формирования являются познавательно-операционный, критический и креативный компоненты (рисунок 2).

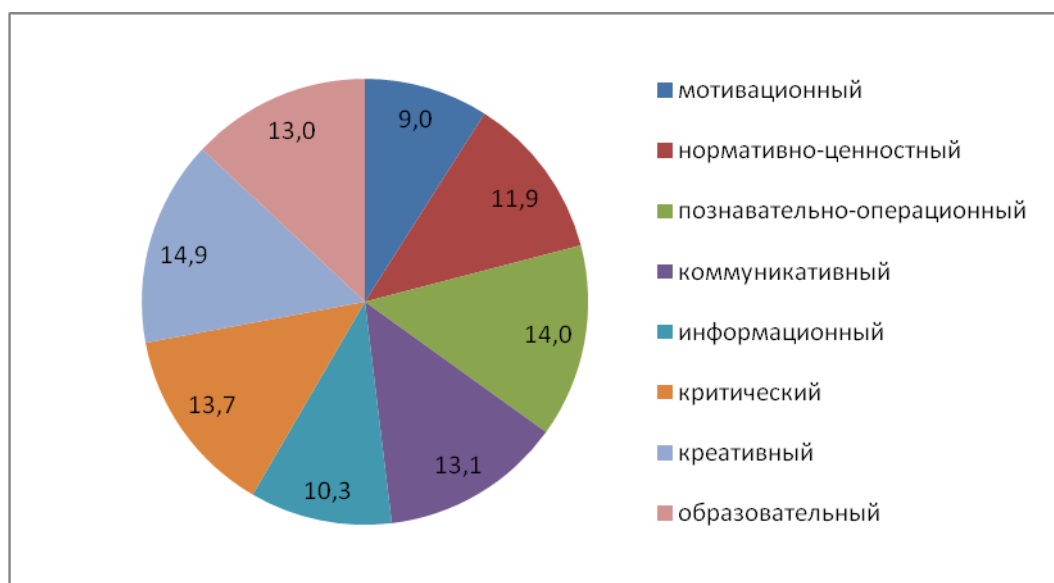


Рисунок 2. Факторный анализ компонентов информационной культуры
 Figure 2. Factorial analysis of components of information culture

На диаграмме видно, что степень влияния (в %) всех компонентов на информационную культуру в целом высока (вариация степени влияния составляет около 16 %), что подтверждает обоснованность выделенных нами функциональных компонентов информационной культуры.

Влияние компонентов информационной культуры друг на друга представлено в таблице 2.

В таблице 2 приводятся коэффициенты корреляции Спирмена, которые показывают, что практически все компоненты информационной культуры взаимосвязаны. Компоненты мотивационный и коммуникативный, мотивационный и креативный, коммуникативный и информационный, критический и информационный слабой тесноты связи. Наибольшей теснотой связи (высокой) обладают такие компоненты информационной культуры образовательного менеджера как креативный и познавательно-операционный, креативный и коммуникативный. Данная проблема заслуживает особого внимания и дополнительного исследования.

Таблица 2. Корреляция компонентов информационной культуры образовательных менеджеров

Table 2 Correlation of components of information culture of educational managers

Компоненты информационной культуры	ИК	мотивационный	нормативно-ценностный	познавательно-операционный	коммуникативный	информационный	критический	креативный	образовательный
ИК	1,00	0,52	0,69	0,81	0,76	0,60	0,79	0,87	0,76
мотивационный	0,52	1,00	0,40	0,38	0,07	0,68	0,50	0,26	0,49
нормативно-ценностный	0,69	0,40	1,00	0,60	0,42	0,50	0,56	0,58	0,40
познавательно-операционный	0,81	0,38	0,60	1,00	0,50	0,48	0,65	0,77	0,40
коммуникативный	0,76	0,07	0,42	0,50	1,00	0,18	0,59	0,76	0,64
информационный	0,60	0,68	0,50	0,48	0,18	1,00	0,28	0,38	0,52
критический	0,79	0,50	0,56	0,65	0,59	0,28	1,00	0,73	0,53
креативный	0,87	0,26	0,58	0,77	0,76	0,38	0,73	1,00	0,64
образовательный	0,76	0,49	0,40	0,40	0,64	0,52	0,53	0,64	1,00

Выводы Conclusions

Исходя из результатов исследования, можно сделать следующие выводы:

1. Большинство образовательных менеджеров школ г. Смоленска (73,1 %) имеют креативный уровень информационной культуры, у 26,9 % респондентов информационная культура сформирована на эвристическом уровне. Средний балл по выборке – 4,2 балла, что указывает на близость данного показателя к граничному значению с эвристическим уровнем и имеющийся потенциал к его повышению.
2. На креативном уровне сформированы следующие функциональные компоненты информационной культуры: мотивационный, нормативно-ценностный, информационный, критический, креативный и образовательный. На эвристическом уровне сформированы познавательно-операционный и коммуникативный компоненты информационной культуры.

Внутрикомпонентный анализ показал отсутствие готовности образовательных менеджеров к деловой коммуникации на иностранном языке. Данная позиция имеет самый низкий балл по анкете (1,3 балла).

Недостаточно сформированными являются и знания в области образовательного менеджмента, управления человеческими ресурсами, эргономических основ АРМ образовательного менеджера. Диагностирована низкая степень готовности к изменению образовательными менеджерами профессиональной среды.

3. В большей степени на уровень информационной культуры оказывают влияние компоненты: креативный, познавательно-операционный и критический.
4. Корреляционный анализ показал взаимозависимость компонентов информационной культуры друг от друга. Однако мотивационный и коммуникативный, мотивационный и креативный, коммуникативный и информационный, критический и информационный компоненты слабой тесноты связи; креативный и познавательно-операционный, креативный и коммуникативный компоненты высокой тесноты связи.

Summary

Information culture of educational manager is a factor of efficiency of activity of the educational manager, of efficiency of activity of the educational organization, an education system during the transition to an information society.

Informational culture of an educational manager (Koshevenko S.V., 2015) is a complex of informational values, knowledge, skills, formed information outlook, as well as readiness and ability to creative self-realization in professional activity of an educational manager and satisfaction of needs in professional information with the use of informational and communicative technologies.

According to the authors, Information Culture of Education Manager should include eight functional components: motivational, normative-valuable, cognitive-operational, communicative, informational, critical, educational and creative. S.V. Koshevenko & S.V. Silchenkova (2015) developed technique of determination of information culture of educational manager level. The survey was conducted in 26 Smolensk schools, 52 education managers were polled.

Most of the educational managers of schools of Smolensk (73,1 %) have a creative level of information culture, 26,9 % of respondents have a heuristic level. Average grade - 4,2 points.

The following functional components of informational culture are formed on a creative level: motivational, normative-valuable, informational, critical, creative and educational. Cognitive-operational and communicative components of the information culture are formed on a heuristic level.

Component analysis showed a lack of willingness of educational managers to business communication in a foreign language. This position has the lowest score on the questionnaire (1,3 points). The knowledge in the field of educational management, human resource management, ergonomic workstation foundations of educational manager are insufficient formed. The low readiness to change educational managers professional environment are diagnosed.

Mostly the level of information culture is influenced such components as cognitive-operational, critical and creative.

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KEY ISSUES IN ADULT NON FORMAL PARTICIPATORY E-LEARNING

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***Abstract.** This paper is concerned with participatory learning, and focuses on the issues that can arise in the application of participatory approaches in e-learning-based adult non-formal education programmes. It analyses the assumptions on which participatory learning theories lie, and discusses the current portability of participatory adult learning practices to an on-line environment. Some key issues in adult non-formal participatory e-learning will be presented, taking into account the available literature and the first results of EScAlADE, an EU funded project started at the end of 2015, which focuses on adult non-formal participatory learning.*

***Keywords:** adult education, e-learning, participatory adult e-learning, design of e-learning participatory programmes.*

Introduction

The World Health Organisation (WHO) estimates that the number of older adults (aged 65 years and over) will be approaching 1.5 billion by 2050 (2011 estimate). The demographics of the world are at a turning point: we are moving ever more into an era of ageing population, and this circumstance is already impacting the cost of social security systems. In many European countries, the increasing cost of retirement benefits is being dealt with by moving people's retirement age back in relation to their life expectancy. The most obvious consequence of this is that more people will have to work until later in life. At the same time, advances in technology are bringing continuous change to every aspect of society, including the professional sphere and, consequently, the world of work is in a permanent state of flux. Thus the necessity to both work later in life and learn new skills many times until retirement are becoming critical aspects of the workers' situation today.

Lifelong learning is generally seen as a means to address the issues of preserving employability, while flexible learning is invoked by insiders as a

solution to the profound transformations of contemporary society. Adult education, especially for the low-skilled, is deemed more and more strategic since it can help to meet the needs for new skills, and ensure that an ageing workforce remains productive. Moreover, lifelong learning can be important tools to provide for people's social inclusion and active citizenship: topical issues in view of the wave of refugees and immigrants currently arriving in European countries.

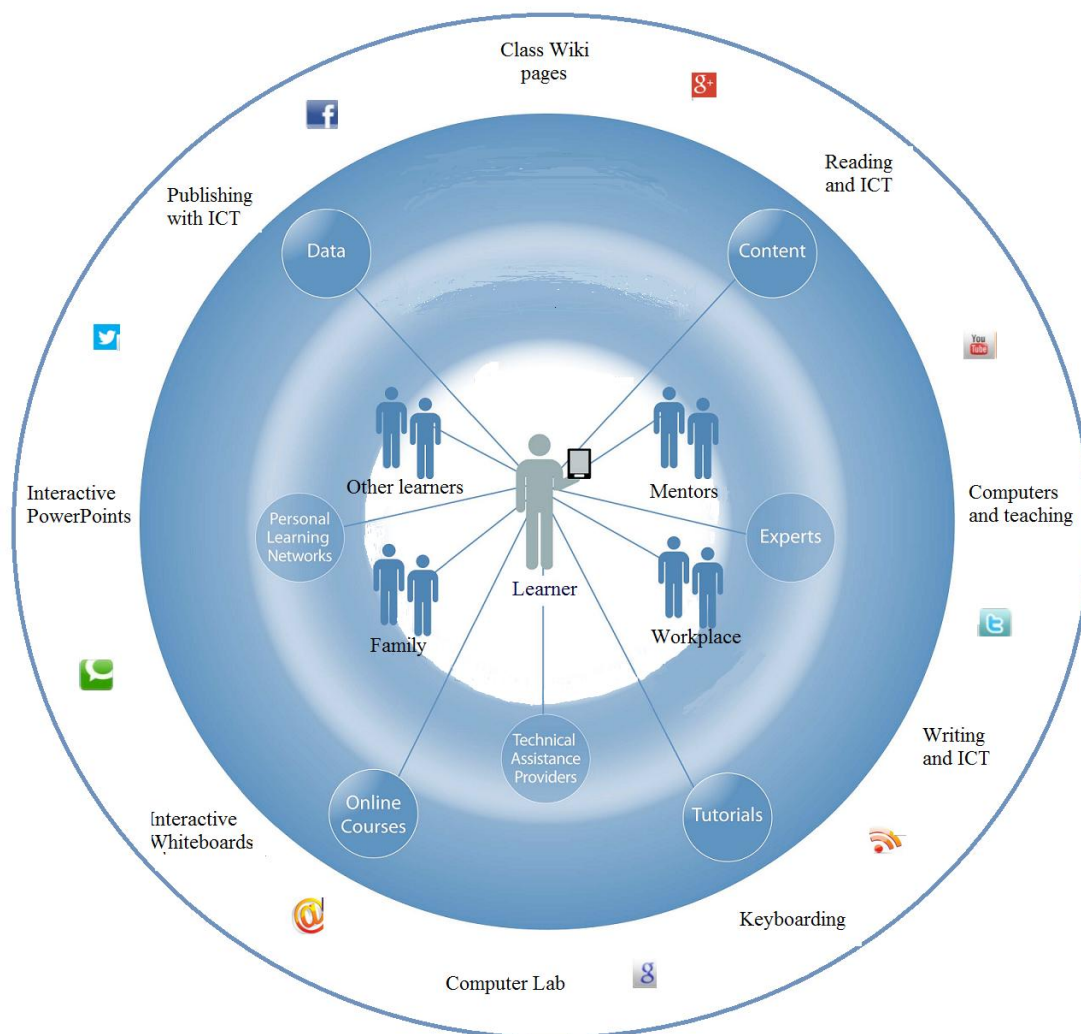


Figure 1 **Integration of participatory practices into an on-line learning environment**

The Education and Training 2020 (ET 2020) programme¹, the new strategic framework for European cooperation in education and training, underlines that these days people can no longer rely on the skills they acquired at school for their entire working lives. On the technology side, the literature emphasises the

¹ https://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/107622.pdf: last accessed 18.02.2016.

relevance of Web 2.0 applications, arguing that they have created a new participatory mindset in which users are not simple consumers of information, but have themselves become producers of web content. Over the last few years, many researchers have begun to investigate how the expanding new forms of Web interaction can be exploited in adult non-formal education, in order to facilitate and enhance learning capability.

This paper is concerned with the integration of participatory practices into an on-line learning environment (see figure 1). It focuses on the issues that may arise with the application of participatory approaches in adult on-line learning programmes. Various assumptions made by participatory learning theories have been analysed, and the current portability of participatory adult learning practices to an on-line environment is discussed.

Opportunities and barriers are illustrated, taking into account the available literature on participatory adult learning.

Participatory adult learning

Participatory learning is grounded in John Dewey's idea that students achieve better results if the learning process "reproduces, or runs parallel to, some form of work carried on in social life".² On a philosophical level, participatory learning can be seen as the natural consequence of two Deweyan concepts: that learning is a problem solving process, and that there isn't any dualism between the subject matter and the method (Dupuis & Gordon, 2010).

Participatory learning represents a family of approaches, methods, attitudes, behaviours, and relationships that have their theoretical basis in behaviourism as well as in constructivism (Rodrigues, 2014). Constructivist theories of learning argue that knowledge is constructed by learners who better learn by actively applying their know-how to meaningful problems (Brown & Palincsar, 1989).

Participatory learning methods comprise a wide range of activities, which share a student-centred view aimed at enabling learners to play an active and influential part in their learning process. This means that learners are not merely listened to, but also actively collaborate to acquire knowledge and skills: in other words, participatory learning focuses on student participation.

In the 1990s, *participation* was a popular buzzword, and the concept of participation was also extended into the field of education. Participatory learning was often experimented to support sustainable development, above all in regards to the agriculture of developing countries (Coldevin, 2002), as well as a means

² p. 92 in: Dewey, J. (auth.), & Boydston, J. A. (Ed.) (1983). *The middle works, 1899-1924* (Vol. 13). SIU Press.

to aid the democratic progress of emerging countries, since participatory learning is, by its very nature, collaborative and so directly fosters democracy. Certain adult participatory learning techniques are also very popular and widely used in management training (especially for project managers and supervisors), such as brainstorming, problem solving, project work, and critical incident response.

Participatory learning requires facilitators. These facilitators interact with learners, for example providing discussion subjects, presenting case studies, presenting tasks that call for participants to work together in small groups, and so on. These types of exercises are aimed at the active involvement of all learners in the learning process, stimulating them to think through their mindset and share with others their experience and knowledge, as well as their values and beliefs. Although facilitators and coaches have many overlapping skills and functions, their role is different: a coach provides individual attention and addresses personal development with an emphasis on a specific task, whereas a facilitator provides a group with meaningful dialogue and broadens personal perspectives, encouraging the entire group to participate collectively so as to increase their ability to operate effectively on their own.

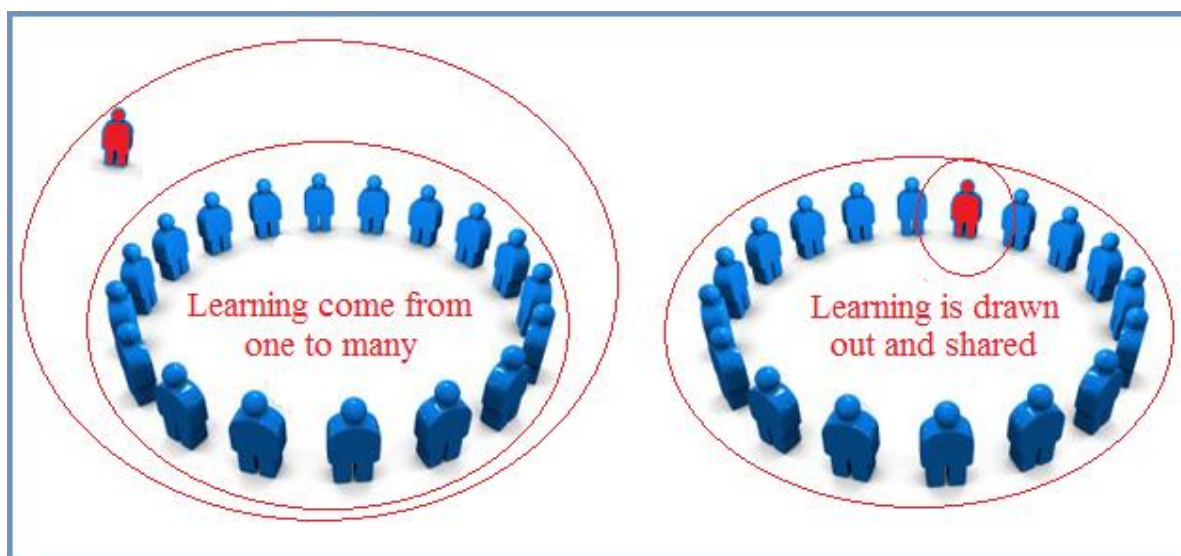


Figure 2 The main difference between learning and e-learning

Participatory Adult Learning Strategy (PALS)

The Participatory Adult Learning Strategy (PALS) is an evidence-based approach to adult participatory learning developed by Dust and Trivette, which results from over 20 years of research and practice and, more recently, from the findings of the meta-analyses of adult learning methods and the synthesis of

research studies into the most effective adult learning practices (Trivette Dunst, Hamby & O'herin, 2009; Dunst & Trivette, 2009; Dunst, Trivette & Hamby, 2010).

PALS authors analysed and measured the positive affect of four adult learning methods: *accelerated learning* (Meier, 2000), *coaching* (Hargreaves & Dawe, 1990), *guided design* (Hancock, Coscarelli & White, 1983), and *just-in-time training* (Beckett, 2000). From their research, the relative importance of active learner participation in learning new knowledge or practices emerged, and from this result a procedure was designed for using evidence-based practices in adult learning.

The PALS model encompasses a 4-phase process that includes:

1. Introduction – the learning topic and related information is preliminarily provided to learners, as well as in-class/workshop warm-up exercises and illustrations/demonstrations.
2. Application – trainees apply information learned; the instructor/facilitator observes their activity, giving feedback and evaluating their use of knowledge.
3. Informed Understanding – trainees are engaged in self-assessment, reflection, and group discussions.
4. Repeat Learning Process – the next steps in the learning process are planned in order to provide further learner understanding, knowledge use, and mastery.

The PALS model, as the result of an empirical analysis of best practice in adult education, is obviously consistent with the most effective adult learning approaches. However a question arises: how do participatory practices work in an on-line learning environment? This question is a part of a more general issue that concerns the portability of participatory approaches and techniques to on-line web-based learning contexts.

At present, rethinking and evolving the vast legacy of traditional training courses appears to be a crucial exercise since educators emphasise the advantages of training opportunities via distance education, arguing that modern digital technology and Web 2.0 tools can revitalise learning.

Synchronous distance learning sessions involving virtual classrooms equipped with e-whiteboards have passed the experimental phase, while asynchronous learning sessions and Web 2.0 tools (podcasts, wikis, chat, forum, blogs) and a virtual world environment (namely *OpenSim*) are widely used. Meanwhile new forms of informal learning at a lower cost, such as learning through blogs (Downes, 2004; Farmer & Bartlett-Bragg, 2005), and through podcasts and videocasts (Ractham & Zhang, 2006), have attracted the interest of researchers, and are now spreading.

To understand the current portability of participatory approaches to an on-line learning environment it would be useful to turn to the 4-phase PALS model, after noting some key factors that influence adult participatory e-learning.

Adult non-formal participatory e-learning

The literature on adult non-formal participatory e-learning shows that there is a broad consensus of opinion concerning the positive correlation between a learner's personal satisfaction and the achievement of their educational objectives (Kidd, 2009). Moreover, many researchers share the opinion that adult e-learning courses that are developed without a careful analysis of the needs of the students are doomed to failure. In fact, adult learners represent a multi-faceted category that is also sensitive to the socio-economic situation.

Regarding participatory e-learning, there are some assumptions that are generally agreed on. One of these is that the success of participatory e-learning depends on the interaction of learners, since they are bringers of knowledge and skills (Kok, 2015).

Another important aspect is that *active learning* is fundamental for participatory e-learning (see figure 3): learners are involved in practices that require actively constructing new knowledge and understanding.

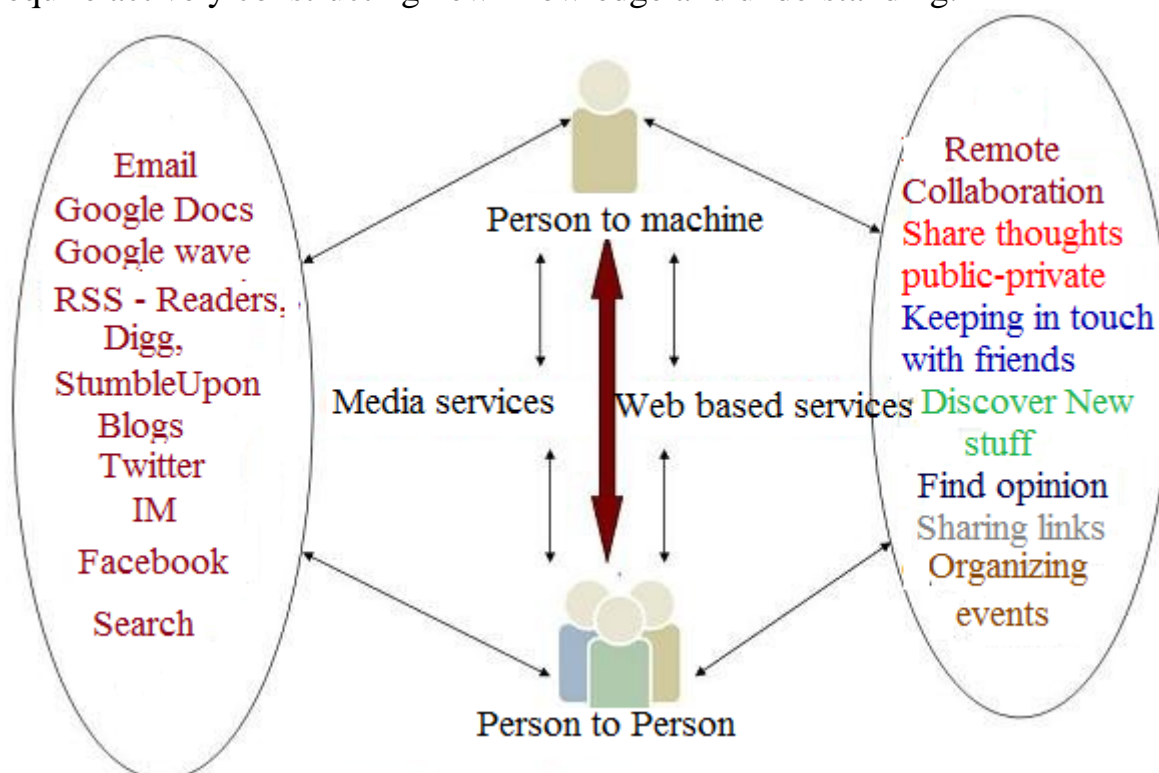


Figure 3 Active learning in the EScaIADE project

Many e-learning systems offer collaborative functions that allow cooperation and facilitate communication among learners, teachers, mentors, tutors, and administrators. These collaborative functions result from the Web 2.0 revolution that in the last few years has swept away the old paradigm of digital communication.³ Web 2.0 encompasses a variety of websites and applications that allow anyone to create and share online information and materials they have created. The key difference between Web 2.0 and the traditional types of websites is that it does not require any web design or publishing skills to create and publish materials on the Web.

There are a variety of Web 2.0 applications including wikis, blogs, social networking, folksonomies, podcasting, and so on. Many of the most popular websites are Web 2.0 sites, such as Wikipedia, YouTube, Facebook, MySpace, and Instagram.

The Web 2.0 revolution has also influenced the educational field with *e-learning 2.0* that has expanded the concept of the *learning community*, focusing on supporting the development and solving educational problems through online collaboration.⁴

The principal aims of e-learning Web 2.0 are:

- to make learning collaborative, easy, and simple;
- to allow learning materials to be used on a global level;
- to allow a real interactivity between teachers and learners, and among learners;
- to encourage developing practices, with the sharing of educational content and teaching methods.

At the moment, despite its topicality, the portability of adult learning participatory approaches to an on-line environment represents a challenging issue, as demonstrated by the scarce experimental data that is available on this subject. However, from the first outcomes of a research conducted within EScAlADE,⁵ it is quite evident that e-learning Web 2.0 applications do not necessarily cover all the 4-phases of the PALS model. Some reflections that have emerged from the EScAlADE ongoing research are reported below.

³ The term „Web 2.0” was first coined in January 1999 by Darcy Di Nucci, an expert in information architecture, but has been in popular use since 2004 when O'Reilly Media and MediaLive hosted the first Web 2.0 conference in San Francisco.

⁴ The debate over what is a learning community is still open since learning occurs in a variety of settings.

⁵ EScAlADE is an EU funded project, started at the end of 2015, that focuses on adult non-formal participatory learning, and involves partners from five European countries (Italy, Latvia, Poland, Greece, and Spain).

Some issues in adult non-formal participatory e-learning

It has been observed that e-learning 2.0 is based on synchronous and asynchronous Web 2.0 tools, mixing classical e-learning tools with the social services of Web 2.0 (Greenhow, Robelia & Hughes, 2009). For this reason, despite e-learning Web 2.0 applications offering a wide range of collaborative tools - many of them derived from groupware software - the implementation and delivery of effective participatory e-learning courses is not easy, especially for adults. Much of the effectiveness of participatory e-learning depends on the educational context (teachers, facilitators, learners, available resources) and on the level of integration of e-learning tools and social services.

From an analysis of the current literature, two main problems appear in relation to adult participatory e-learning. Firstly, there are different learning styles and characteristics in the field of adult learning (Caffarella & Barnett, 1994; Merriam, Caffarella & Baumgartner, 2012) and not all of these are portable to a participatory e-learning environment. Secondly, the digital divide, both cultural and physical, can represent a barrier and reduce the applicability of participatory approaches in the e-learning environment.

Table 1 shows the e-tools that are usable within the 4 phases of the PALS model; of course their effectiveness depends on the context.

Table 1 PALS model and electronic tools

Phase	Tool	Communication	Note
Introduction	Classical e-learning tools	Asynchronous	
Application	Classical e-learning tools, social Web 2.0 services (e.g. chat, on-line forum, Skype, video conference, etc.), work cooperative tools (word processor, spreadsheet, shared agenda, etc.)	Synchronous and asynchronous	Need to plan participatory activities between teachers and learners and among learners
Informed Understanding	Classical Web services and virtual forums	Asynchronous	Use of electronic form, self-evaluation tests
Repeat Learning Process (mastery)	Classical Web services (planner, word processor, shared agenda, etc.)	Asynchronous	

In adult participatory e-learning some variable aspects play an important role in addition to course climate, personal interest and motivation, career

aspiration, etc. Adult participatory e-learning is also affected by technological factors such as skill levels in new technologies, the availability of hardware and software, and the reliability of internet connection. Another important element is the different ways in which teachers and facilitators interact with learners. This entails the design of customisable applications. Finally, an important question concerns the cost. Participatory learning requires the presence of facilitators, and this increases the cost of courses designed with a participatory approach. The cost evaluation of participatory e-learning is not easy. Participatory learning in an on-line environment is still a novelty, and experimental analysis is required in order to identify effective elements that can be used for evaluating its costs.

Conclusion

Web 2.0 has introduced a new participatory mindset: users are not merely consumers of information, but have become producers of content.

At the same time, adult learners who are fully engaged in learning activities with their peers appear to be more likely to participate effectively in other educational practices, and are generally more positive about the educational process.

They will become knowledge creators, produce work for a wider audience, employ both non-formal and informal learning, see that what they learn will serve them elsewhere and is transferable to other contexts, and develop a sense of a learning community.

It is well known that people remember more if they are actively involved in their own learning process. For this reason, expanding new forms of Web interactions in adult non-formal education can facilitate and enhance learning capability. However, one cannot take for granted the full portability of face-to-face adult participatory learning approaches to an on-line environment.

Our opinion, which has developed from the ongoing research within the EScAlADE project, is that the participatory concept ought to be rethought in the light of the opportunities offered by the new technologies. This will lead to the design of new learning approaches that will most likely represent a hybrid combination of classical e-learning, Web 2.0 services, and face-to-face activities. We are persuaded that new technologies can enhance the mainstream learning in adult education, but to develop an effective learning model it is necessary to collect experiences and conduct experiments. This is what the EScAlADE project is intended to do. On the basis of the analysis of data obtained from a transnational survey, we will prepare a participatory experiment with a sample group of adult learners. The experiment will be designed taking the PALS model into account, and will be aimed at obtaining evidence of the portability of participatory approaches to an on-line learning environment.

Acknowledgments

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THE REFLECTION OF PEDAGOGUE'S IDENTITY IN THE LIFE ACTIVITIES: THEORETICAL RESEARCH MODEL

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Abstract. *The innovative research model presented in this article includes the micro, mezzo, and macro context of the identity by expressing its multiple dimensions of the pedagogue's personality in personal, cultural and historical and social aspect. The dispositional traits of personality i.e. emotions, talent, behaviour and opinion, along with the adaptation characteristics i.e. interests, motivation, values, attitudes and character are analysed in the micro context. The meaning of the respective social environment is drawn in the mezzo context where the pedagogue's, family, student's and religious identity develop. The further crystallisation of the identity happens in the macro context that influences the development of professional, national, local, political and cultural identity.*

Keywords: *biographical approach, personality, the structure of the personality, identity of the personality, identity research model.*

Introduction

The theoretical research model of pedagogue's identity is developed as a part of biographical research conducted by the author (Medveckis, 2004, 2006, 2007, 2009, 2012, 2013, 2013a, 2014). As a result the *Research Model of Pedagogues Personality* has been developed and presented on IJAS conference in Prague & Rome (2013), Freiburg (2014) and was first published in the *International Journal of Multidisciplinary Thought* (Medveckis, 2015). The concept of the research model of pedagogue's personality is based on the integrity of the personality i.e. holistic approach. On the ground of the traditions of the qualitative research analysis (Thompson, 2000; Abrams, 2010) the theoretical concept of the personality includes the understanding about dispositional traits of personality: behaviour, talent, the individual differences of thoughts and emotions, followed by the adaptation characteristics: motives, aims, interests, values, identity and the integrative life story (McAdams & Pals, 2007).

The holistic view of the personality and the analysis of its components according to Karpova (Karpova, 2005: 9) draws a conclusion that personality is a monumental creation and will be an issue for scientist for a long time because, firstly, it includes the most important aspects of an individual's being, activity and characteristics and, secondly, it takes decisions influenced by the heredity,

environment, situation and experience (special historical circumstances). Thus, the personality is not completely free but is capable of self-regulation and self-determination on the ground of self-perceived and self-tested universal values.

Liegeniece's researches (Liegeniece, 1992, 1996, 1999, 2002, 2013 etc.) on the holistic analysis of various personality aspects focus on the early stage of the development of the personality. As concluded by Samusevica (Samuseviča, 2013: 361), the development of the holistic approach has given Liegeniece the opportunity to look in particular into the issues of self-regulation and development conditions, problems and opportunities of the different individuals in context of social and cultural environment.

The understanding of life activity in this research is based on the conclusions of Ausma Špona (along with further studies by Elita Volane and Ainars Špons) that draw a system of manners and attitudes for individual's activity and satisfaction of needs developed within the cognitive process of oneself, society and nature (Špona, 2006, Volāne & Špons, 2010). A significant research is also conducted by Kruze resulted in the publications of Latvian pedagogical researchers in "Laikmets and personība" (Karpova, Kestere, Špona, Kaļķe, Vugule, Vedišceva, Oļehnoviča, Bernāts, Sīle, Samuseviča, Medveckis, Zigmunde, Meikšāne, etc.)

Thus the author of this research started a more in depths examination of pedagogue's identity that lead to the development of a new *research model of pedagogue's identity and its influential factors*.

The Components of the Holistic Structure of Pedagogue's Personality

The theoretical aspect of the research model of personality is based on the conclusions of the USA psychologist Salvatore Maddi about personality. He indicates the core and the periphery of the personality. According to Maddi, each personality has the core characteristics that do not change during the lifetime and significantly influence the behaviour, activity and its results (the inherited potential, abilities, aims, principles etc.). At the same time the periphery also has sustainable behavioural characteristics e.g. behavioural styles and models, motivation, features, schemes etc.) (Maddi, 1996).

Similar core and periphery concept is presented by Illeris in his work *Transformative Learning and Identity* (Illeris, 2014) and by Strika who according to different psychological theories (McAdams, & Pals, 2007; McCrae, & Costa, 1997) structures personality in three groups: *dispositional traits, characteristic adaptations and integrative life stories*. Dispositional traits of personality are defined as broad dimensions of psychological individuality that describe assumedly internal, stable, and global individual differences in behaviour, thought, and feeling. Traits account for consistency in individual

functioning across different situations and over time. In general dispositional traits are measured using the methods of personality self-evaluation. Second group involves wide range of such personality constructs as motives, goals, and projects, values and beliefs, cognitive schemas and styles, Ego and psychosocial stages, coping strategies, defence mechanisms. They all are called characteristic adaptations. These characterizers describe what a person wants from the life and what he does in order to achieve it and how the person avoids from what he doesn't want. Characteristic adaptations are usually contextualized in time, place, situation or social role. Third group comprises individual's integrative life story that is internalized and evolving narratives of the self that people construct to integrate the past, present, and future and provide life with some sense of unity, purpose, and meaning (Strika, 2009).

The socialisation processes influence personality development processes in early childhood and self-regulation as the recourse of inner evolution (Lieġeniece, 1999, 1997). The cognitive sphere, emotionality, willingness, necessity and interests are essential within the self-regulation process (Lieġeniece, 2013). The theoretical context of socialisation process is based on the theory of interactionism represented by Cooley, Mead (Balantine & Roberts 2009). According to them the socialisation process is the result of social interaction involving various agents i.e. family, school, public organisations etc. The transformation of the individual to a member of society is based on the subject-oriented perspective, intuition-oriented perspective and culture-oriented perspective (Gudjons, 1998). The pedagogue's role within the socialisation process is rooted in Parson's understanding of socialisation process and family values (Vikmane, 2009).

The author's conclusion meet the idea of other researchers that within the micro context of the personality essential are social factors, within the mezzo context – structural conditions and within the macro context – state politics (McKeracher 2004; Bruning, 2002; Cross 1981).

The Understanding of Identity: Social Aspect

Scientific literature deals with various perspectives and contexts of the identity. The identity refers to the idea of being and belonging and the ways individuals make sense of themselves (Bisley, 2007). According to Stepĉenko, the individual identity in context of collective, national and regional identity is selfness discovered in self-identification, which consists of interweaving and overlapping of various identities (Stepĉenko, 2014: 63). Zobena, Grīviņa and Nikišina draw conclusions that the concept of identity has cardinally changed also historically – from a philosophical concept about an individual's characteristic and personality traits to identity constructions, which can be

changed by the individual. Furthermore, the circle of agents referring to the concept has also widened. We can talk about the identity not only in the context of an individual, but also of a place, object and time (Zobena, Grīviņš & Ņikišina 2014: 7-8). Bela-Krūmina refers to the identity as a story created by people about their peers and living space. The regional identity defines the individuals relations with the respective region, social system and history i.e. landscape, inhabitants, culture, traditions etc. (Bela-Krūmiņa, 2005: 25). Berger and Luckmann have a similar interpretation of the identity outlining it as an element of subjective reality, which remains in dialectical interaction with society and is influenced by social processes. Once crystalized it is sustained and can change due to the social relationships. The social process related to the development and maintenance of identity is determined by the social structure and vice versa (Berger & Luckmann, 1966).

The representative of the symbolic interactionism Cooley in his “I” theory outlines that the self-awareness of an individual is formed by the individual’s perception of what others think of him/her, how others evaluate him/her and how this interaction results in self-evaluation (Ballantine, Roberts, 2009). Mead draws similar conclusions about the functioning of the individual and the social life, which can result in readjustment or conflict and crystalize the concept of selfness internally differentiated as “Me” and “I”. “Me” is formed by the opinion of others, which have become a part of personality with its social ground. The structure of “I” characterises that part of individuality elements, which are result of personality actions (Baldwin, 2009; Charon, 2004). According to Mead the social reality is created within individuals’ interaction by means of symbols and their manipulations with a special meaning of language and gesticulation. *Symbols not only transfer general information to various individuals but also they carry significant individual values, as they are the main functioning tool* (Volkovs, 2011). The symbolic meaning of language in connection to identity is mentioned also by Druviete who outlined that the base element of some ethnos can be different – *religion, culture, common geographical space, even national cuisine, however, in most cases the base of the identity is language* (Druviete, 2010).

Danish professor Knud Illeris conducts that “like other mental conditions the identity is created, developed and changed through learning – which all take place in interplay with innate dispositions that are integrated in the learning processes and thereby can influence the learning as well as the identity. So even though various kinds of characteristics of the identity can be said to be inherited, the transfer takes place as an integrated element of the learning process. Therefore the identity also includes the three dimensions — content, incentive and interaction (Illeris, 2014: 69). According to the Danish professor the identity in the learning process is connected to the individual and the surrounding and

“always involves the three same dimensions, i.e. the content or the cognitive, the incentive or the emotional and the interaction or the social (Illeris, 2014: 70) and outlines the *main identity*, which unites the identity elements, as the central part of his identity concept. Giddens has proposed it as self-image that reflects the individual life (Gidenss, 1999), Erkinen calls it biographical identity (Erkinen 2010), Erikson names it the ego-identity (Erikson, 1998). A specific issue is the biographic identity (Alheit, 1992, 1999) and Pierre Bourdieu’s *habitus* concept, which is understood as unconscious embedding in the individual, while the core identity is mainly conscious (Illeris, 2014: 72). Thus, *habitus* may be understood as a term for the unconscious elements of the individual mental core. However, *habitus* also includes elements belonging to the **personality layer**, which includes aspects of how the individual wants to be and appear to others the surrounding world (Illeris, 2014: 73). Thus the personality layer typically includes conditions like values, attitudes, convictions, meanings, understandings, forms of behaviours, habits of communication, patters of collaboration, empathy, social distance and caution (Illeris, 2014: 74). The personality layer has certain similarities with *dispositional traits of personality* outlined by Strika that unite emotions, character, talent, while the *characteristic adaptations* include values, attitudes, interests and motivation (Strika, 2009).

There are various interpretations of emotions both as physiological, neurological, behavioural and verbal reaction on inner or outer irritations important for a humans life (Fox, 2008), and from the antidote perspective as positive, negative (Plutchik, 2002). In addition, there are also base emotions whose amount can be various. The most common are Ekman’s classification of base emotions: anger, disgust, fear, joy, sadness and surprise (Ekman, 1992) and Izard’s inherited base emotions like interest, joy, surprise, suffer, disgust, anger, shame, fear and contempt (Izard, 2009). When the base emotions transform, the secondary emotions appear, which often are considered as feelings: love, devotion, reverence, disappointment, regression, aggression and optimism (Mihailova, 2015). Feelings are interpreted as human’s emotional process that shows relatively independent subjective attitude towards important real and abstract objects/ subjects for the individual. They develop due to socialisation and usually refer to significant values of the individual (Mihailova, 2015: 175).

The character is a unity of person’s individual characteristics and peculiarities, which accrue in actions, attitudes and behaviour. In Latvian scientific literature character refers to educational issues of personality that form the basis for Latvian pedagogical psychology (Dāle, 1962; Students, 1928, 1930, 1935; Celms, 1933) and continued within the holistic researches by D. Liegeniece, I. Salite and I. Mikelsonē.

Motivation consists of inner and outer motives that encourage definite individual’s behaviour and the behaviour is connected to a specific aim to meet

specific needs. The needs are biologically and socially defined and are researched by various theories of motivation. Firstly, there is the theory of needs visualised by the pyramid of needs by Maslow (Maslow, 1954) and his followers Alderfer who shortened Maslow's pyramid to the three components: existential needs, a need for relationships and a need for development, Herzberg who developed two factors theory about the satisfaction of need and the prevention of dissatisfaction. Another follower is McClelland and his achievement motivation theory. He bases his opinion on the assumption that human beings are motivated by the need of achievement, power and relationships. Vroom's theory of goal setting and task motivation considers the individual's subjective perception evaluation of the situation and the clearness of the aim.

The motivation of the pedagogue's self-realisation is defined by the deepness and wideness of the personality influenced by the interactive *person's character traits, skills and attitudes* (Parson, 2011). The values are interpreted in moral, aesthetic and universal dimensions, considering that the *values are fundamental believes that define and motivate attitudes and actions* (Definitions of Values. In *Ethics, Compliance, Initiative*).

The attitude can be defined as a long-term emotional expression of perception and cognitive processes, often reduced to "like – don't like" evaluation. The social pedagogical aspect of the definition has both widened and narrowed concluding that the attitude itself is difficult to evaluate but it can be deducted from person's self-evaluation and behaviour (Schwarz & Bohner, 2001).

The interests include emotional and cognitive components that connect the individual with a specific activity in a specific field (Schiefele, 1992, 1996). The emotional and cognitive expressions define the willingness to involve, which can be influenced by the emotional experience.

According to the core identity is developed and changed by learning during the life course. But at the same time it is also a task of the core identity to secure continuity and therefore changes usually only happen gradually and often almost imperceptibly if the individual is not exposed to sudden and profound changes of life conditions defined by Erikson as a transition from one age period to the next (Erikson, 1998) or by Gidenss as a different spacetime (Gidenss, 1998).

Illeris illustrates the identity as core that must include something more, something that lies outside and around the core and reaches out towards the various connections to the surrounding world. Thus, the core identity can be seen as innermost and most basic of the three concerning layers that is surrounded by the attached *personality layer*, which is related to Erikson's concept of ego-identity. The personality layer is more flexible and more susceptible to change when the individual receives important new impressions

or experiences new conditions (Illeris, 2014: 74). The *preference layer* includes all the many different conditions the individual meets in his/her daily life i.e. his/her **daily identity** and it is about what and how the individual more or less automatically prefers, how one thinks and acts in all of the many situations in which no special considerations or efforts are involved. However, *part-identities* are related to one or two of the main areas that can be broadly termed our attitudes and our practice, which at the same time indicates that these part-identities may be more or less different kind in different cultures with different traditions and norms and for different groups of people with different kinds of practice (Illeris, 2014: 74-75).

Part-identities in relation to practice can typically be grouped in three main areas that can be termed the *work identity*, *the family identity* and *everyday life or interest identity*. Regarding attitudes the part-identities can be grouped in three main categories that can be termed the national-cultural identity, the religious identity and the political identity (Illeris, 2014: 75). According to Illeris, each of these part-identities is closely connected to core identity and in the same time they have their own core. It is important that all these various part-identities are parts of an individual pattern and interaction in which some parts may be closely related, while others are far from each other and there may be elements that more or less in contrast (Illeris, 2014-75).

Hooks outlines two ways of forming definitions to explain culture. The first includes the emergence and the transfer of identities, meanings, knowledge, conviction, values, memories and attitudes of society. The second is more focused on a definite community's lifestyle, including traditions, customs, style, religion, behaviour and rituals (Hook, 2007).

The cultural environment is termed as the individual's activities in the cultural area where he/she exists as a social subject and interacts with subject influencing factors. The structure of the culture consists of material and non-material culture (Macionis & Plummer, 1998).

The social identity is the result of an agreement between the individual and the social group or society (Jenkins, 2008). Sociologist Volkov draws further conclusions on the ground of Jenkin's approach that the scientific interest about social identities is connected to the modern society's deep transformation due to postmodernism. HE defines social identity as the knowledge about the personality's individual belonging to a specific social group and at the same time emotional and evaluative attitude towards this belonging.

Volkovs also concludes that in the modern Latvian society there is a topical need for the belonging to a community and area and a desire to protect one's linguistic identity and the social identity providers are not only social groups but also definite personalities, and Latvian sociologists among all social identities, are mostly interested in national and ethical identity. Thus, Volkovs's

conclusions link to Iller's ideas about the transformation of identity and outlines that the social identity of the personality continuously evolves, as the socialisation process has to be considered as the attribute of human's life (Volkovs, 2015). According to Koroleva, Rungule, Snikere and Aleksandrovs, the formation of the identity is one of the most important tasks of juvenescence (Koroļeva, Rungule, Snikere & Aleksandrovs, 2009: 145).

Gudjons also emphasizes that, as well as the childhood has to be overlived, also the thinking about the future is essential (Gudjon, 1998: 152) and Lenzen outlines the role differences, individual ideals, values and norms and draws attention to biographical consciousness which in the context of historical and social situation colours the "I" identity.

Discourse of the Pedagogue's Professional Identity

The "I" identity is analysed in the Lāce's research about the influential factors of Latvian pedagogues' career. According to Lāce, career includes the professional individual evolvement during the whole lifetime. It is connected to the human's development in the main life activities (work, family, relaxation) and human's social activity. Furthermore, by developing the career the individual improves one's professional "I" concept and answers questions about personality skills, competences, main life motives, aims etc. (Lāce, 2011). The mentioned assumptions are linked to Callalan's idea that nowadays the key to a successful career is a clear development of identity, the definition of the career aims and finally the selection of career strategy (Callalan, 2003).

When characterizing pedagogue's identity Mikelsone, Odiņa and Grigule emphasize the importance of holistic research based on the interplay of economic, social and political problems. Thus, an interdisciplinary approach to teachers' education is required with a focus on teachers' professional identity and lifelong learning. The analysis of the professional identity is based on the individual's understanding of the professional and individual evolvement and a universal and dynamic development in the main life areas (work family, relaxation). Thus, *when analysing the concept of the professional identity it should be closely linked between concepts of "professional career" and "development of personality", along with "career" and "self-understanding"* (Miķelsone, Odiņa & Grigule, 2014).

The development of professional identity is a process that includes the knowledge about teaching, inspiring, about relationships and the teaching subject which according to Sugrue roots in the pedagogue's personality and is influenced by the closest family members, other relatives, experience, interesting teaching episodes, political context, teaching traditions and cultural archetypes (Sugrue, 1997).

Referring the pedagogue's identity there are several common features e.g. university pedagogues teach and values as a professional group with common professional perspectives about teaching learning (Nixon, 1996). According to Pechter and Head the common primary teachers' identity component is the desire to take care of the child. By teaching low status subjects the teacher tries to find the professional identity in the teaching process in general. Furthermore, for the experienced teachers significant is such aspects as the interaction with students, the commitment to serve the students which should be more important as personal dissatisfaction with working environment (Pechter & Head, 1996).



Figure 1 Research Model of Pedagogue's Identity and its Influential Factors

Moore and Hofman's research outline that the school's aspiration for quality refers to a highly developed professional identity (Moore & Hofman, 1988).

The process of becoming a professional is an interaction between the values others find significant in a pedagogue and the pedagogue's own values. It includes the process of growing defined by the learning from one's own experience and sharing this experience (Phelan, 2000).

The biographical research, the analysis of the pedagogue's life activities on the ground of the theories of personality's holistic aspect and identity's theoretical concepts with particular focus on the theoretical researches on pedagogue's professional identity can draw conclusions and offer a theoretical research model of pedagogue's identity and factors influencing development thereof (see Picture 1).

Factors Influencing Development of Pedagogue's Identity

The most significant factors influencing the development of the pedagogue's professional identity are the *acceptation of choice, participation and recognition* (Maslo & Fernández Gonzàles, 2015; Day, Stobart, Sammons, Kington & Gu, 2007; Riegel, 2004; Hasbrauer, 2001; Deming, 1951) along with *trust and safety* which is interpreted in context of life quality by Tisenhofs and Meņšikovs (Tisenkopfs, 2006; Meņšikovs, 2006) and *ought-being* which includes moral, aesthetic ideals, philosophy and religion (Lasmane, 2007, 2001a, 2011b; Rubenis, 1997; Milts, 2005).

The ideals of ought-being can be individual or social. *The aspect of values outlines the dimension of ought-being and indicates the divide between the achieved and the ideal state* (Tisenkopfs, 2006: 15). Approaching the ideal depends on *capacity i.e. the unity of characteristics, skills and activities that allows to develop an appropriateself-realisation model [...] The capacity integrates all available "inner" and "outer" resources of human – education, properties, finances, social connections etc. The capacity is an active life mechanism, which connects knowledge and practice, recourses and activities. The capacity is influenced by education, social background, upbringing; it changes during the lifetime and is affected by human's experience* (Tisenkopfs, 2006: 19).

The individual choice in pedagogue's life activities develops the feeling of self-regulation and capacity to reflect on one's work, which is the most effective way of gaining competences. However, social recognition (from the employer) and individual recognition (job satisfaction, feeling of doing the right thing etc.) encourage to start new initiatives and the individual desire to improve one's work and life quality by acting in different social areas, which Bourdieu defines

within the concept of *habitus*, and accrue economic, social, cultural, symbolic and political capital (Bourdieu, 2004: 151-164).

The participation is connected to trust which is an emotional attitude (Roukonen, 2013), a psychological state which is open to possible vulnerability (Vanneste, Puranam & Kretschmer, 2014; Coleman, 1990; Rousseau *et.al.*, 1998; Bhattachary *et.al.*, 1998; Mayer *et.al.*, 1995).

The main aspect of safety is human safety, which according to Thomas is an existential state when the basic needs are satisfied and the participation in community life can happen. Ozolina outlines the aspect of objective conditional and subjective feeling, interaction between outer factors and internal governmental structure (Ozoliņa, 2012). In addition, Ijabs connects the safety to risk awareness and outlines that the future awareness influences presence. Thus, the human's identity becomes reflexive and individuals have to agree on choices concerning one's lifestyle (Ijabs, 2012, 87).

Discussion

*Pedagogue's identity is connected to multi-dimension interpretation and holistic approach to pedagogue's personality considering the component of professional identity.

*Professional identity is a continuous interpretation and reinterpretation process of experience and it never stops which can be understood as lifelong learning. It is dynamic and in context of professional development searcher for answers *who am I at the moment?* and *what I want to be?*

*Professional identity includes both individual and contextual understanding and it is not single. It is expected from teachers that they behave and think professionally in addition to knowledge and attitudes. Teachers differ according to the way they realise the professional features; there is not a common teaching technique in school and each teacher can develop his/her own teaching culture.

*The professional identity is formed by part-identities (Illeris, 2014) or sub-identities, which are connected to different contexts and relationships. Some of these identities can be defined as the base of teacher's professional identity, while others are more peripheral. It is important for pedagogue that the sub-identities are not in contrast. Experienced teachers feel the contrast when there are changes in educational system or work environment. The more important is the sub-identity, the more difficult is the change.

*According to Coldron and Smith (Coldron & Smith, 1999) pedagogues should be active in their professional development. It includes individual learning from peers and cooperation. Professional identity is not something the

teachers have; it is something they use to make sense of themselves as teachers (Beijaard, Meijer & Verloop, 2004: 123).

Conclusions

1. The structure of pedagogue's personality consists of the dispositional traits of personality i.e. emotions, talent, behaviour and opinion, along with the adaptation characteristics i.e. interests, motivation, values, attitudes and character within micro (individual), mezzo (studying, working, family, daily, community) and macro (education, ethical, geographical, political, cultural environment).
2. The categories of the pedagogue's identity are emotions, behaviour, talent, character, interests, motivation, values and attitudes, which develop in the micro context, family, pedagogue's, daily, student's and religious identity in mezzo context and professional, national, local, political and cultural identity in macro context within the socialisation process influenced by the factors as choice, participation, recognition, trust, safety and ought-being.
3. The research model of pedagogue's identity is variable. It reflects the dynamic relationships among all the components of the model. The model is a tool to be used for pedagogues' identity researches in any definite cultural environment, considering that the timeframe is defined and the defined influential factors of personality development are taken into account.

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COMPETENCES OF SOCIAL WORKERS FOR WORK WITH YOUTH: CASE ANALYSIS

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Abstract. *The Article reveals competences of social workers for work with youth based on the case analysis of social workers dealing with youth problems. It provides the content of social workers' competences, peculiarities of social work with youth from the professional point of view. Practical experience of social workers working with youth is interpreted as a reflection of professional activity of social workers which highlights the competences of social workers solving youth problems. The aim of the article is to evaluate competences of social workers working with youth. The research strategy was based on the perspective of constructivism, research applied a targeted – partially structured interview data collection method. The research revealed strengths of social workers working with youth: development of trust-based professional relationship, ability to work with a group of young people, empathy, ability to take the initiative, and ability to flexibly and creatively respond to situations. Yet some weaknesses of social workers solving youth problems have been identified: understanding the role and professional restrictions of social worker and problem solution skills.*

Keywords: *competencies, youth, social work with youth, social worker.*

Introduction

Social work with youth is an area requiring high professional competences, because youth in the current society is one of the most vulnerable social groups in the context of social work. This is determined not only by the peculiarities of young age people but also by the reasons increasing social exclusion of youth. Currently problems related to the youth social group and characterized by differentiation have been widely analysed by the researchers: factors characterizing social exclusion of youth have been investigated by R. Brazienė, G. Merkys (2012), L. Okunevičiūtė-Neverauskienė, J. Moskvina (2008), R. Rudžinskienė (2013); aspects of social exclusion of youth (deviation, migration, education, health status and accessibility of social services) by D. Jurgaitienė, A. Stankuvienė (2007), I. Jonutytė, Š. Litvinas (2007), G. Petronytė et al., (2007), S. Vaitekūnas, A. Bukauskaitė (2008), A. Juozulynas et al., (2009), R. Pilkauskaitė-Valickienė etc. (2009), J. Žukauskaitė (2012), G. Žibėnienė, D. Brasienė (2013), R. Ilgūnienė (2014); political factors (civic

and political involvement) by R. Žiliukaitė (2008); I. Zaleskienė & V. Andriušaitytė (2015).

Although researchers accord great importance to specific problems of the youth target group and analyse basic professional competences of social workers not only at national (Kavaliauskienė, 2005, Leliūgienė, 2006, Indrašienė, Garjonienė, 2007, Ivanauskienė, Varžinskienė, 2007, Dirgėlienė, 2008, Gudžinskienė, Norvaišaitė, 2010, Makštutytė, Vaškevičiūtė, 2011, Verbylė, 2012 et al.), but also at international level (Valutis et al., 2012, Jedynek, 2014, 2014, Bartoş, 2015), there is still no extensive analysis specifying professional competences of social workers working with youth.

In Lithuania youth workers are the persons working in the sphere of youth activity (in the municipal education, culture, sports and social institutions) and are correspondingly called social workers, cultural workers and social workers having education of social sciences or having acquired relevant competences for social work with youth. At national level there is a uniform system for the evaluation of competences for work with youth and youth workers based on the “Methodology for Certification of Youth Workers (Sakalauskas et al., 2012) and “Mechanism for the Evaluation of Competences of Persons Working With Youth (2012). Yet, the aspects of social work with youth are still not regulated, i.e. the aspects highlighting the competences of social workers acquired for work with youth. This proves the relevance of this Article in order to analyse professional readiness of youth social workers via the competences for work with youth.

Object of the Research: competences of social workers working with youth.

Aim of the Article: to evaluate competences of social workers working with youth.

Research methods: Scientific literature and document analysis; partially structured interview.

The content of competence of social workers

The analysis of preparation of social workers is based on a reflective social work competence model complying with the contemporary labour market requirements, which highlights the importance of competences acquired during the learning process rather than learning outcomes. When analyzing the content of competences, it should be noted that the main three composite parts of professional competences have links with the holistic competence concept, i.e.: the knowledge and understanding of a certain subject (theoretical knowledge); the ability to apply the acquired knowledge in certain situations (practical application of knowledge); values and attitudes (Dirgėlienė, 2008; Pukelis,

2009; Teresevičienė 2011; Paurienė, 2012). It could be stated that usually the presented structure of social worker's *competence* is a three-polar concept consisting of knowledge, skills and attitudes which correspondingly form relevant values. This paradigm explaining the competence provides an explicit structure of competence and, consequently, reveals multipolarity of the content of competence.

It is important to note that theoretical sphere of social work which should be understood by a social worker is a system with various social work, social welfare and other social theories, principles of their application, analysis of social problems, individual problem cases, and empowerment strategies (TAR, 2015, No 11591; Official Gazette, 2006, No 43-1569). The skills could be specified as the ability to use theoretical knowledge, personal qualities and sources in practical social work activity. In other words, this is a component of practice connecting knowledge and values and transforming them into specific actions equalled to work "tools" which are used by professionals in their work in order to provide effective services to the client (Kavaliauskienė, 2005; Gudžinskienė, Norvaišaitė, 2010). There are five areas of activity of social workers. In order to realise them, the basic professional competences consist of social work skills since operational areas are exclusively directed toward practical activity: 1) identification of social assistance needs; 2) planning of social assistance; 3) organisation and provision of social services; 4) evaluation of effectiveness of social work; 5) improvement and development of social worker's professional activity (Standard for Preparation of Social Worker, (2008).

Values (ethics) are an inseparable part of social worker's competences. The expression of social work values is analysed as an aspect explicitly revealing the mission of profession (Kavaliauskienė, 2005; Ivanauskienė, Varžinskienė, 2007; Prakapas, 2007; Valutis, Deborah, Bell, 2012; Verbylė, 2012).

It could be stated that ability to apply the acquired theoretical knowledge, organize social work process via relevant skills and social work values, clearly defines the content of social worker's professional competence and is based on the professional social work practice.

Peculiarities of social work with youth from the point of view of professional activity

Youth in the works of researchers (Kutkienė, 2008; Gailius et al., 2013; Kriščiūnaitė, Kern, 2014; Pruskus, 2014; Vosylis, 2014) is described as one of the main vulnerable groups of the society and is identified in the professional field of a social worker as youth (from 14 to 29 years of age) with less

possibilities (The youthpolicy law, 2003). It would be appropriate to relate youth having less possibilities to a social exclusion phenomenon determined by social peculiarities of the youth target group, i.e. youth discrimination on the ground of nationality, race, belief, gender, sexual orientation, disability etc; limited social skills of young people; critical youth situations (death of a close relative, job loss, divorce etc.); young people having various dependencies; young and/or single parents; orphans, youth from social risk families; early drop-outs from school; youth dependent on social care system; long-term unemployed or young people living in poverty; young migrants or refugees or people from refugee or migrant families; disabled young people etc. (Youth in Action - Programme Guide, 2013). It is important to evaluate that the above reasons restrict possibilities of young people and prevent them from getting efficient access to formal and informal education, becoming internationally mobile, acquiring the right to participate in the public life and getting the status of active citizen. Therefore professional activity of social workers working with youth is directed toward the promotion of social inclusion and is based on the “Description of the Activity of Youth Workers (2013), which legally defines functions of youth workers: to provide individual assistance to young people in difficult life situations; to pursue initial prevention in order to early identify risky behaviour of youth and reduce the risk of negative consequences; to communicate and cooperate with the family/guardians of young people as well as with national and municipal institutions, non-governmental organizations, religious communities in solving youth policy issues; to develop personal and social competences of young people.

It should be highlighted that youth worker is a person working with a young person, a group or community of young people, seeking personal and social development of young people and their active engagement in public life, and having relevant competences for this work (Description of the Activity of Youth Workers, 2013). Pursuant to the “Mechanism for the Evaluation of Competences of Persons Working with Youth (2012), all youth workers belong at least to one of these typical classifications (persons can be assigned to several categories): 1) „coming from youth non-governmental organizations” – persons having experience for work with youth in pursuing the activity in youth organizations or organizations working with young people; 2) providers of social services – persons dealing with specific youth problems: social risk, prevention, psychological assistance; 3) specialists of public policy fields. In this case it is important to note that social workers represent the category of providers of social services.

Social work with youth includes not only solution of youth social problems; it is also social activity directed toward public and professional integration of young people in order to reduce marginalization of youth. There

fore professional readiness of a social worker is very important and it shall consist of professional competences relevant for work with youth. “Methodology for Certification of Youth Workers” (Sakalauskas et al., 2012) indicates five areas of competences to be acquired by social workers: *personal/individual competences* (reflexiveness; ability; organizational ability; creativeness; critical thinking etc.); *social competences* (communication, work in the group/team; empathy; conflict management etc.); *subject competences* (informal education, understanding adolescence and young person’s life; structural understanding of youth life context etc.); *methodological competences* (understanding the methods and their application; ability to actualize youth issues etc.); *special competences* (understanding specific youth topics; legal knowledge and information related to the work with youth etc.).

Social work with youth requires interdisciplinary understanding determined by multipolarity of the youth target group. Correspondingly professional activity of youth social workers is based on the above basic competences divided into separate five competence areas which in practical activity of social workers shall be interrelated in order to receive the expected high results in work with youth.

Research methodology

The research strategy was based on the perspective of constructivism and the approach that competences are not an automatic phenomenon, but a result of social worker’s activity, i.e. constructed on the basis of experience gained by social workers (Bitinas et al., 2008; Juodaitytė, Rūdytė, 2009; Lamanauskas, Augienė, 2010; Gudžinskienė, 2011; Doolittle, 2014; Galbin, 2014). The constructus of the cognition object applied in the research, i.e. on competences of social workers working with youth, was based on the “Mechanism for the Evaluation of Competences of Persons Working With Youth (2012). Therefore the research follows the policy that professional competence of a social worker working with youth consists of personal, social, subject, methodological and special competence areas for work with youth. The research applied a qualitative survey strategy which provides for an extensive identification of qualitative characteristics and approach to the problem under analysis via the experience of respondents which helped to specify competences for work with youth. Criteria sampling was chosen in pursuing the research. The respondents were selected on the basis of two criteria: higher social work education and social work experience with youth (from 14 to 29 years) of at least two years. The research sample consisted of 7 social workers working in different Vilnius district organisations: 3 social workers work in open youth centres, 2 social workers work with youth in the streets, the other 2 respondents work in the organisations having several separate units for different target groups, and one of them solves

problems of youth from 14 to 29 years of age. The research applied a targeted – partially structured interview data collection method which systemised the interview and made it more extensive. The research was carried out on 21 January – 16 November 2015. While analysing the interview data the method of qualitative content analysis was applied. It was chosen because in the qualitative content analysis research results expressed in key characteristics (categories/sub-categories) were specified from the answers to interpretations and evaluations provided by respondents.

Evaluation of competences of social workers working with youth

The research aimed to identify strengths and weaknesses of social workers working with youth from the point of view of competences. Following the analysis of interview data, the categories of strengths of informants' competences were obtained: *professional competences* and *personal competences*. It was defined that in the block of professional competences social workers give particular attention to the development of professional interrelation in the work with youth based on trust, which is their strength. This is proven by the recurrence of this category during the entire interview with informants in the answers to different questions: „*Relationship...Without any doubt when you work with young people, the most important thing is to develop relationship*” <...> [7]; „<...> *the main function of social worker is somehow to make contact with youth, to develop relationship and gradually increase mutual trust*” [6]; „*Development of relationship is most important <...> through communication, time spending together and organization of common experience*” [4]. The analysis of the informants' database showed that ability to work in the group is one of the most important aspects for social workers with respect to competences. Social workers highlight that while working with youth they focus on group processes which are related to the organization of informal education of youth. To this end social workers give main attention to understanding of their own role, i.e., the role of a group leader, as well as to understanding the principles of youth group interaction: „*Then you yourself <...> can see how groups are functioning, including the group dynamics and your role as a person working with a group <...>*“ [7]; *We use and base our activity on group dynamics <...>* [4] <...> *I learnt everything through leadership, through certain processes in the group <...>* [6]. The research revealed that empathy as a strength of social worker's professional competence is determined in the work with youth by the ability to understand young person, his/her behaviour and experiences based on youth-related personal experience. Ability to understand young person's situation is a strength of social workers when it is based on

actual experiences: „Because we are young <...> we are open to innovations, and we understand youth problems <...> Therefore there is no major difference between youth and workers <...>“ [2]; „When you simply want to know how this young person feels <...> you start speaking about your own life, for instance, that I did feel the same when I was your age; I was also an object of bullying, and people said bad words to me [1]. The research revealed that young age of social workers is a possible assumption to reveal empathy as a strength of social worker's professional competence. This is explained by the ability of social workers to get into a young person's situation by using actual experience, i.e. own experience and problems in young age. Personal competences as strengths of social workers working with youth are specified by the following sub-categories: *ability to take initiative* (<...> *I am active, young people like this, for I don't sit in one place but suggest trying something, I also initiate certain activities.* [3]; <...> *I am able to suggest something interesting so as to make them be active* <...> [6]) and *ability to flexibly and creatively respond to situations* (<...> *I always have plan B* <...> *I can change things immediately and improvise so as to motivate them* <...> *I have various ideas and I really comply with the young people's needs.* [5]; <...> *of course, creative, you should think of multiple methods.* [1].

According to social workers, young people are often passive and this makes social workers take the initiative and activate youth: „<...> they are not the young people/adolescents who want to do something and participate <...>“ [5]; „<...> the major problem is that young people are passive <...> *I am active and young people like this, I don't sit in one place but suggest various activities, urge youth do/try something*“ [3]; „<...> quite often I extend an interesting proposal, suggestion so as to make them move/do something; this is very important in our work with youth [6]. The analysis of social workers' experience in work with youth showed that ability to flexibly and creatively respond to situations at work with youth is an additional strength of informants in the block of personal competences: „<...> when I organise some activity to the group I always have plan B; it is always completely different and I can switch to it very quickly and improvise so as to make youth interested <...> Nearly one hundred eighty degrees upside down to make it happen and to make young people interested <...> when you prepare programmes and lessons, they are not eager to take part, usually this is problematic youth“ [5]; „Therefore you have to be <...> creative and think of various methods. We can suggest multiple activities to youth and all of them might not be interesting to young people <...>“ [1].

The research revealed that ability to understand the role of social worker and professional margins in work with youth is one of the informants' weaknesses with respect to competences. The category *understanding of social worker's role and professional margins* is specified by the conflict of the

defined subcategories – roles (*Here we face role conflict, as a specialist you want to say*

<...> but need to be a friend to a young person [1]; I often receive questions: where is specialist and where is friend – they are young people [3]), clearly specified personal and professional interests content (<...>) when I work with young persons in the street I know my personal limits, because I have many problems with this. [4]; <...> I respond to all situations sensitively; this prevents from effective work because in certain situations I feel pity for them <...> this prevents from making the right decision <...> [2]).

It was established that in the work with youth social workers can hardly separate (and coordinate) between the two main roles: the role of social worker as a specialist in work with youth and the role of social worker as a „friend“ on the basis of which professional relationship with youth is developed on the basis of trust: *„When I want to know feelings of a young person I act as a friend, tell more about my personal life, for instance that my feelings were the same when I was his/her age <...> In such a case you cannot ask formal questions because they are immediately distracted“ [1].* Therefore social workers start facing role conflict: *„They will share their problems only when you are their friend; if you are just a worker, they will not say anything <...> Here we encounter the role conflict; as a specialist you want to say what is appropriate and what is not, but in order not to lose contact, you have to be friend with young person“ [1]; „I am often asked: where is specialist and where is friend“ [3].* According to informants' answers, social workers' role as a friend in creating trust-based professional relationship with youth is their strength, but problem arises when social workers are not able to coordinate this with the professionally organised work: *„<...> how to break this relationship into assistance relationship? What should be done in order to achieve a breakthrough to make a young person treat you as one of the people who wants to help“ [7]; „<...> if you don't understand and cannot provide professional explanation why in a certain moment you behave like this, it looks like you don't move and nothing happens“ [4]; „There is no clear picture of a worker I should fit in, therefore I have to manipulate“ [1].* The analysis of interview data revealed that social workers face problems in managing their emotions in the work with youth and, consequently, are not able to distinguish between personal and professional interests: *„<...> I respond to all situations sensitively, this prevents from effective work, because in some situations I feel pity although this shouldn't be the case; this hinders my work and decision-making. If a young person is hungry or doesn't have clothes, I want to prepare a package of food and clothing... It would be better to direct him/her, say something and not simply give“ [2]; „<...> when I work in the street with youth, I know my personal restrictions, because I have many problems with this: I even invited these people to my home <...> I and my colleagues borrowed*

money“ [4]. It should be noted that ability to understand own and other people’s emotions and manage them adequately, is called management of emotional intellect (Kušlevič-Veršekienė, Pukinskaitė, 2009). According to answers of respondents, the knowledge and attitudes of social workers on how to work with youth do not comply with social workers’ emotions and this prevents from following social work principles. The weakness of social workers’ emotional competence is also actualized by the problem of “burnout syndrome”: “ <...> *I feel somehow that sometimes and especially now I am on the verge of burning out, that I overworked <...> And motivation starts shaking*“ [7]; „*I want to rest a little bit, and then I will again be able to set the goal*“ [4]. This means that insufficient abilities of social workers to manage negative emotions and stressful situations in work with youth prevent them from setting new goals related to professional activity.

Professionally organised work of social workers working with youth is based on problem-solving skills which serve as the basis of two sub-categories: *dilemma situations* and *distrust in the taken decision*, specifying the weakness of informants’ competences. The lack of informants’ problem solution management skills in the work with youth is reflected in the *dilemma situations*, where social workers do not know which problem solution alternative to chose in order to achieve the best change in the youth situation:

„*One day, I remember, I found gas pistol in a young person’s room. In such a case it is not clear how to behave in order not to take wrong actions*“ [6]; „*Sometimes I really don’t know how to behave in certain situations <...>*“ [3]. According to B. Švedaitė-Sakalauskė & V. Gevorgianienė (2011), in social work dilemmas are inevitable, they are determined by the specific nature of profession, but they have to be solved, and this depends on professional actions of social workers. Another sub-category – *distrust in the made decision* – is another fact demonstrating that social workers lack decision-making skills which was identified during an interview with one respondent: „*I would say that one of the weaknesses is trust in the decisions made, because adolescents, especially senior, feel this (between 17-19 years of age). They feel when I doubt before making decision <...> and then they simply don’t want to listen and hear me. I have to be strong, and in order to be strong, I have to know that I am right. And this is my weakness*“ [5].

Conclusions

Social work with youth is based on the integrated youth issues which determines vulnerability of youth as a social group. For this it is necessary to ensure targeted social worker’s activity based on the perspective of social inclusion of youth which determines not only solution of youth problems but

also enhancement of youth capacities to manage own situation. In view of this social worker follows informal education principles, i.e. executes activity together with young people and according to their needs, and this enables young person to independently solve problems and successfully integrate in the society.

The research revealed strengths of social workers working with youth: development of trust-based professional relationship, ability to work with a group of young people, empathy, ability to take the initiative, and ability to flexibly and creatively respond to situations. Yet some weaknesses of social workers solving youth problems have also been identified: understanding the role and professional restrictions of social worker and problem solution skills.

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BAK-SNEPPEN MODELS FOR THE EVOLUTION OF STRUCTURED KNOWLEDGE

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***Abstract.** Scientific knowledge is subject to a twin evolution, since its development towards novelty creates disconnections and inconsistencies, while the need of structure requires order and method so that transmission and comprehension can be ensured. Models of biological evolution can help to understand many social and economical phenomena where the search for optimality is hindered by voluntary or random competition. Bak-Sneppen is one of the most significant models because it balances at best explication power and simplicity. Unlike cellular automata models, Bak-Sneppen models join locality and globality. The authors try to re-read these models in the framework of mathematics, where, despite its high developed structure, knowledge waves can hinder comprehension both of pupils and of scholars. Some paradoxes are shown, where a greater knowledge diminishes efficiency and capability.*

***Keywords:** Structured knowledge, Ontogeny versus Phylogeny, Mathematical teaching, Bak-Sneppen Model, Partitioned Frames and Evolution.*

Introduction

Instruction and consequent acquisition of a structured knowledge always were torn between a frame of imitation of examples (more or less exhaustive) and a frame of theoretical knowledge, exposed more or less systematically. Better reactions are usually achieved by imitation, while a stronger structure is acquired when a solid systematic basis is available, so that examples and experiments can be inserted in a solid frame. Theoretic basis alone is not sufficient, since it is difficult to be memorized and transferred into practice, while every knowledge requires to be recalled and strengthened.

Since the most ancient times mathematics and linguistic (as rhetoric) were subjects of methodological reflection. Many teaching experiences were attempted and descriptions are available. Mathematics found a conceptual foundation, challenging but transmissible, starting from Euclides' Elements

(third century b.C.). They rapidly succeeded in acquiring a leading role as a fundamental reference and kept this role for over 1500 years. On the other side, linguistic found its basis in Panini's book (fourth century b.C) for Sanskrit, and in Cicero's and Quintilianus' works (first century b.C. and first century a.C.) for Latin, hence for a long teaching tradition in European cultural development. In this short note we refer to some moments of mathematics development.

We are dealing with the following problem: what happens when some part of didactics seems not to be "sufficient", and therefore must be modified? In the long period (a biologist should speak of Phylogeny) this happens when new knowledge arises, as it was with de l'Hopital's fundamental book of 1696, where for the first time some techniques of differential calculus were made explicit, so that Newton's and Leibniz's researches could become a general purpose tool. Another critical step for mathematical analysis was the long evolution of the concept of limit, what still allows different didactical choices: should the limit of sequences be introduced first, or should the limit of functions be given at once, and should Euclidean space be used or a general topological space? Another problem is given by the fact that the definition of limit does not give any hint to the way how that is to be found.

A long lasting problem was a correct general definition of integral and nowadays it is to find the best way of introducing the theory to the students of various specializations (including also pure mathematicians). On a more general level there is the secular difference between anglosaxon and continental approach: the first starts from the observation of physical phenomena, while the second starts from the concept of function and seems to lie inside mathematics, continuing the famous querelle between Newton and Leibniz. Incidentally we can recall that Italian students seem to be confused if they start from an anglosaxon text, because they have a good training in mathematics, but no particular training in physics.

In the short period of study of a young pupil (here we can speak of Ontogeny) on the contrary the continuous superimposition of new adjustments over previous knowledges (right or wrong does not matter) creates very often a conflict that confounds student's ideas.

The authors chose to insert this problems in a frame of interconnected selective evolution. A simple essential model seems to be Bak-Sneppen model, even if it is not suitable for quantitative statistical analysis, but only to express tendency trends.

The *first section* summarizes the model and some interesting cases studied by the authors, namely it is recalled how sectional evolution hinders the destruction of achieved objectives, but can also prevent further improvements (*turris eburnea*, ivory tower effect).

The *second section* discusses some general behaviors that often happen in social sciences, and also in economics. It can be remarked that the acritic acceptance of models elsewhere successful happens also in education, with results that can lead to opposite effects.

The *third section* describes a case of mathematical long period phylogeny, namely two completely different approaches to the computation of a root, and shows how the method used in computers rather follows the fashion than a true search of efficiency.

Finally the *fourth section* describes an experiment performed at the University of Udine, where different behaviors in mathematical phylogeny can be recognized. They seem to insert Kanisza's conceptual frame into Bak-Sneppen evolution model, allowing an interpretation connected with Freudenthal theory of sudden conceptual jumps.

Inside Bak-Sneppen models

The Bak-Sneppen model was originally introduced as an archetypical (or ideal) model of evolution by Per Bak and Kim Sneppen (Bak & Sneppen, 1993) (compare also (Bak, 1996), (Piccinini et al., 2013)). After a comparison of many existing models that could explain (well) only some particular features of the phenomena, ignoring many collateral aspects, they attained a synthetic model, that glues globality of information and locality of performance, but is not restricted to single cells. Their classical model, that has been developed in many more sophisticated forms, was defined as follows. There is a circle of N nodes and they are occupied by N different species, each of which has at present a random fitness. The fitness values are independent and uniformly distributed on $(0; 1)$. At each discrete time step the system is updated by locating the species with lowest fitness and replacing its fitness by a new random variable (between 0 and 1). This would in itself reach optimization of all the species. This is the utopian dream of instruction, social support, church and many other charitable institutions. The absence of result is usually justified by the lack of economical resources. But actually Bak-Sneppen model gives a more subtle explanation: when a species changes its fitness this action perturbs the two nearest species, that in turn change their own fitness at random, even if it were already good. Therefore while usually the worst species improves, the neighbors are turned at hazard. Bak-Sneppen models can be defined on a wide range of graphs using the same update rule as above. The model shows that this random processes can result in self-organization to a critical state. Threshold of fitness rises, rapidly at first, then exponentially slows until it reaches, around 0.66, the critical state from which level extinction sweep back and forth through

the ecosystem. Hence a general progress is anyhow achieved, since it becomes rare that a species falls under the critical level, while the distribution of values above is tendentially uniform.

Brunk in (Brunk, 2000) suggests that self-organized criticality is the sort of process that should have great intuitive appeal to social scientists. A large bibliography of applications of self organized criticality can be found in (Turcotte, 1999) (see also (Ausloos et al., 2004) for an economic application). The authors anyhow think that a sound basis for applying Bak-Sneppen model of contact with neighbors is given by Duesenberry's demonstration effect. Its first presentation can be found in (Duesenberry, 1949), while many application to social sciences can be found for example in (Cavalli, 1998).

Although the Bak-Sneppen model is extremely simple, it has not yet been completely solved in spite of numerous analytical and numerical investigations. A recent explicit solving formula for the case of 4 nodes (the smallest non obvious dimension) is to be found in (Schlemm, 2012). Motivated by the difficulty of analyzing rigorously even the one-dimensional version of the Bak-Sneppen model, (Barbay & Kenyon, 2001) proposed a simpler model with discrete fitness values. In their model each species has fitness 0 or 1, and each new fitness is drawn from the Bernoulli distribution with parameter p . Since there are typically several least fit species, the process then repeatedly chooses at random a species for mutation among the least fit species. In case of small number of nodes explicit solutions can be found using Markov chains, as it was done by the authors in (Piccinini et al., 2013). Parameter p can substitute up to a certain level a plurality of values, but it cannot explain the staircase phenomenon found by the authors in (Piccinini et al., 2013) and (Piccinini et al., 2014), and in particular the phenomenon of overtaking in partitioned frames. Hence binary structure, though simple and appealing is not sufficient for a thorough description of what may happen. Anyhow also this case is by no means trivial, as it was shown by (Meester & Znamenski, 2002).

Changes in the structure of the contacts have been studied (also in (Piccinini et al., 2013), table 5). In particular the classical Bak-Sneppen bilateral adjacent contact structure is somewhat more stable than other more erratic structures since random and scattered perturbations keep the average level of fitness at a lower level. This depends on the fact that in the classical model a long sequence of high values can be attacked only from its boundaries, so that it takes a long time before it undergoes a change (usually unfavourable). The natural step was to investigate systems where this structure becomes stable, what was performed in (Piccinini et al., 2014), section 3. There the global system is split in two or more subsystems that do not have contacts with each other so that only the subsystem where a minimum is found is subject to

evolution, while all the other subsystems are preserved from any change. This protection increases the average fitness of the global system, both during transitions and in the terminal states. Remark that the only stable terminal states are those in which the cells of all the subsystems but one have reached the top level of fitness. It may take a very long number of iterations (infinite if the fitness is continuous) to reach this terminal situations, and usually some form of staircase is experimentally found, so that the average fitness seems to stay for a long period and then suddenly jumps to a new higher level (Staircase behavior described in the conclusions of (Piccinini et al., 2014)). When the number of fitness levels is greater than 2 a very important phenomenon may arise, namely “overtaking”, as was explained in section 5, fig. 1, of (Piccinini et al., 2013): if the local minimum of a subsystem is higher than the global minimum, but some of its subjects have not reached the maximum, this system cannot change, so that it defends its good state, but it cannot improve. On the contrary for a subsystem where an absolute minimum exists there is the possibility not only of reaching but even of overtaking the “good” system, even if the probability is very low. This fact explains some sudden scientific, cultural, economic and political phenomena of overtaking: the principle “*quieta non movere*” (Let quiet things stay) may lead to standstill, in the models just like very often in real life.

Construction and deconstruction of structured knowledge

The basic Bak-Sneppen model asks a dramatic question: why those who are involved in the process of improving the weaker species may become worse? A first answer is obvious, because someone has to bear the costs, but the aforementioned Duesenberry model provides a further explanation. It is clarified by the brutal paradox of (Pfeffer & Sutton, 2006) which is reported here:

Suppose you went to a doctor who said “I am going to do an appendicectomy on you”- When you asked why, the doctor answered, “because I did one on my last patient and it made him better”. We suspect you would hightail it out of the office, because you know that the treatment ought to fit the disease, regardless of whether or not the treatment helped the previous patient. Strangely enough, that logical thought happens more than we might care to admit in most companies.

We took this paradox from the book of (Brischi & Marzano, 2015), where the uncritical imitation of a successful process is stigmatized. In economics the presentation of case studies leads *ipso facto* to consider them as best practices to follow. The spread of this theory is dominant, and, depending on the model of

Bak-Sneppen, should lead to an overall improvement of the general situation, but the price is to admit ups and downs around the average level, what can be disappointing.

The tendency towards the imitation of the neighbor (real or virtual) often acts in the social sciences and economics, leading to differentiation, which is often masked as innovation. Broadening main fields of action in economy can be studied in the context of INPUT-OUTPUT matrices, as was done by (Droli et al., 2014) and by (Chang et al., 2015). The trend towards multi-functionality can also be recognized in the coalescence of territorial structures, as was shown by (Taverna et al., 2013).

Multifunctionality has dispersive character and often ends up creating a short period of damage rather than of benefit, as Bak-Sneppen model foresees. This is in agreement with the classic vision already mentioned by Dante in his Comedy (Alighieri, 2001)

*“...Follow my steps, though all such wisper of you:
be as a tower of stone, its lofty crown
unswayed by anything the winds may do.*

*For when a man lets his attention range
toward every wisp, he loses true direction,
sapping his mind's force with continual change.” Purg. 5, 13-18*

*“...it is no learning
to understand what one does not retain....” Par. 5, 41-42*

In the last verses it is already covered the need to anchor the new acquisitions, without dispersion, as is well known by experts in advertising.

Two theoretical grounds ideal for a test are language teaching and especially teaching and research in mathematics, as it can be protected from external influences, although there are educational trends that seek to expand their scope of action. Here we meet the eternal competition between the core of a knowledge system and its additions, as described by the authors in (Piccinini et al., 2015) in the examples of the third section, in particular in formula (28).

The model of overtaking, mentioned in the previous section, seems to validate the traditional teaching techniques of separation between different areas, avoiding bundles of heterogeneous notions, the effectiveness of which may be of short duration.

The networks now allow to combine multi-functionality with specialization, though the cost is that of a virtual intermediation chain, composed either by human operators (typically poorly paid), or by automatic

operators consisting of expert systems suitable to filter the information through the maze of networks see (MacCormick, 2012). The danger is that expert systems that learn by studying the behavior of users end up with the polarization into information hubs ignoring developments useful but not fashionable.

Mathematical Phylogeny

Originally, there are natural numbers and the language that expresses them. An extensive analysis of the inconsistencies and linguistic connotations that are associated with numbers was made in (Piccinini et al., 2015), with reference to (Eco, 2003), chap. 5 where he studied the loss and compensation. Mathematical philology, like all artistic and constructive activities, enters in the conceptual scheme of (Kubler, 1972), especially in chap. 3 dedicated to disposal and retention. It is interesting the dual role of the mathematician. On the one hand he is a builder who discards what is no longer useful, and on the other is a philologist / archaeologist / artist, who digs up and ennobles the past. The historical co-existence of the two roles will be shown by the example of the algorithms for the calculation of the square root.

Note that even an algebraic number as „root of 2” from the operational point of view is known only as an approximation represented by the decimal sequence 1.41421... .

The fact that it represents the diagonal of the unit square convinces one of its life, overcoming the Pythagorean problem of its non-commensurability with the side of the square, but does not make it operationally correct, as there is no appropriate tool to measure fractions over the second or third digit. The algorithms in use are all of the iterative type. What was once taught in school, despite its complexity due to the need to avoid repetition of calculations, was based on the introduction at each new step of the highest decimal digit without exceeding the value of 2. On the other hand the computer uses a method that is inspired by the ancient approximation technique used by the Babylonians. The procedure is based on a geometric reasoning followed by a process of error compensation, both very natural. You are required to build a rectangle of fixed area A so that the base and height are equal. As an initial assumption suppose base is b_1 . In correspondence the height is $h_1 = A / b_1$. Excluding the fortunate case in which $b_1 = h_1$ you must improve the choice, taking the base to an intermediate value between the old base and the old height, such as the average of the two, and the process is repeated. The formula becomes

$$b_{n+1} = 1/2 (h_n + b_n) = 1/2 (A / b_n + b_n) \quad (1)$$

In the case of $A = 2$, starting from the initial value 1 the first terms are 1, 1.5, ... 1.1417, 1.41422 It is important to note that any initial positive value leads to a sequence that converges to the same limit $\sqrt{2}$, while starting from a negative value the sequence tends to $-\sqrt{2}$.

This raises several questions; why this method, old and quite intuitive, is not normally taught in primary schools? Nowadays every micro-computer calculates the square root so that manual calculation becomes unnecessary, but it was not taught even fifty years ago when an automatic instrument was not available. The reasons are at least three: it is necessary to have knowledge of the real numbers (not only as geometric intuition), the concept of limit of a sequence is required, some statistical idea is needed for stating that the average of two numbers gives an error minor of the difference between the two original numbers. Finally it should be proved that the sequence (1) defined by recurrence actually converges to a finite limit, and this limit is the very root of A . The continuity, even at the level of intuition, allows to understand that the limit is given by a rectangle in which the base and height are equal. The first course in mathematical analysis provides an initial response in the case of the equation (1) but a deepening and a generalization to a different choice of average (which is what is actually used in computers) requires the concept of contraction. Furthermore, since the process is stopped after a finite (and small) number of iterations, it is important to be able to estimate the residual error. From this point of view, the school system of computing one decimal digit after the other has the advantage of providing immediately a maximum for the error, and therefore it appears safer. In the case of equation (1), on the contrary, the estimation is not evident, as the sequence b_n is a monotone decreasing sequence (starting from the second term), that therefore converges, but does not supply an immediate estimate of the error. The sequences that provide an easy estimation of the error are those nested obtained starting from a positive sequence that decreases towards 0, in which then the terms are taken to alternating signs. Finally a constant, which will be the limit, is added.

$$x_{n+1} < x_n \quad a_n = (-1)^n x_n \quad b_n = L + a_n \quad (2)$$

In this case the error $|L - b_n|$ is estimated by the difference of the two consecutive terms $|b_{n-1} - b_n|$. In our case equation (1) is replaced by

$$b_{n+1} = kN / b_n + (1-k) b_n \quad (3)$$

If $\frac{1}{2} < k < 1$, then the sequence is nested, but the convergence to the limit becomes slower as k approaches 1. Therefore in the computer k is chosen as a

value simple to be represented in the binary system but not far from $\frac{1}{2}$. It was also noted that in binary system the school algorithm becomes extremely simple and the running time of the machine is less than that required by the elegant equation (3).

One explanation may be sought in the fact that in the initial years of computers the theory of contractions was very popular and was considered an advanced tool that scientifically characterized its users. It may also be noted that for the roots of higher order algorithms of type (1) are easy to use and to check. The basic algorithm for h-th root becomes

$$x_{n+1} = [(h-1) N / x_n^{h-1} + x_n] / h \quad (4)$$

However, in view of the low frequency of use, it is in general reduced to the indirect calculation of x^y with $y = 1/h$.

Mathematical Ontogeny

In mathematics the structured knowledge taught in the courses often destroys the ability to solve problems by intuition. Most general methods are learned theoretically and are not compared with the simpler, albeit less general, techniques. One obvious case is solving a quadratic equation in which, if there is suspicion that the solution is integer, it is easier to inspect directly the divisors of the known term, switching to formula only in case of failure. Experience shows that about half of the students of scientific courses ignore this shortcut, while conversely almost every person at the moment who has to solve the same problem as a game uses the simplified method, perhaps because the perception that the solution must really be integer is greater.

Vicario (Vicario, 1984) recalled an experiment of Kanisza showing that the increase in theoretical information reduced the ability to solve actual problems (for details see (Piccinini et al., 2015), note 12). Strictly related is the ontogeny of the interesting case of drawing a triangle knowing the three sides. The reader should try himself before reading what follows!

Use white paper (without lines and squares) and draw a triangle with three sides of length 4, 5 and 6. The only tool allowed is just a ruler, but neither compasses nor square.

It is possible that you decide to use analytic geometry (if you remember it) by solving an algebraic system like

$$x^2 + y^2 = 25 \qquad (x-6)^2 + y^2 = 16 \quad (5)$$

that is, $x = 15/4 = 3.75$, $y = 5\sqrt{7} / 4 \approx 3.307$, for which a choice of possible vertices becomes (in a suitable Cartesian coordinate system) the triad (0,0), (6,0) and (x, y). The available instrument is not ideal for working with the Cartesian coordinates, especially in the absence of an orthogonal network, however, a solution more or less approximate can be found. How can you verify and improve it? But it could be established that the tool is a piece of white paper where the three lengths (4, 5, 6) are marked on the margin and nothing else. The unavailability of a metric system prevents you from using the solution of the algebraic system (5). What to do?

We conducted the experiment with two different cohorts of students at the University of Udine. The cohort of engineering students (first year) knew in its totality (possibly through the suggestion of neighbors) the classical Euclidean construction, made with ruler and compass. Once fixed the first two points at a distance (e.g.) 6 the problem was thus to approximate the construction of an arc of a circle of radius 5 centered at the first point using the segment on the sheet of length 5 and rotating, thus obtaining a simulacrum of the circle. Similarly for the other circle. Here too, the question is the same: how to verify and improve the result? At this point the construction of Euclid, without compass, becomes an unnecessary complexity. The other cohort was formed by students (mostly girls) of Educational Science (first year). Almost all students presented a very efficient solution, suitable also to be taught in primary school. From the first point (A) draw a segment of length (e.g.) 5 with a random angle, obtaining a provisional point C1. From B trace the ray that passes through C1 and mark the point C2 at distance 4 from point B. In general C2 does not coincide with the point C1, otherwise the problem is solved. Draw now the half-line from A passing through the point C2 and draw the point at distance 5 from A, and so on, alternating the starting points A and B. After two or three iterations it happens that the points are stabilized, and this is a solution (approximate) of the problem. It is therefore clearly a convergent iterative method (though the students did not have the mathematical knowledge to know this fact).

The iterative formula, wanting to simulate the process on the computer is as follows. Denote by a the distance AB, b the distance AC, c the distance BC; ϑ be angle BAC, ϕ the angle ABC. Start from an arbitrary angle ϑ_1 . The recurrence is

$$\phi_k = \arctan [b \sin \vartheta_k / (-a + b \cos \vartheta_k)], \vartheta_{k+1} = \arctan [c \sin \phi_k / (a + c \cos \phi_k)].$$

The confrontation between students of the two cohorts lead engineers to understand that their trial and error process of drawing points of the circles becomes selected and streamlined through the process of students of education

sciences. Two facts can be appreciated: rigorous seclusion prevents improvements and allows overtaking; in the learning of mathematics progress is tied with sudden discontinuities as fully described by (Freudenthal, 1991) with some examples starting from (Freudenthal, 1975).

Conclusions

The structured knowledge acts both at the level of phylogeny, since it settles over time and builds a system of consistent relations, and in the ontogeny of the individual acquisition. The moments of confrontation between different structures or innovation sparks need time to affect the existing structures. The history of philosophy first and of science later are full of secular changes, and this happened in mathematics as well, even if it is less susceptible of perturbation. The Thucydidean κτήμα εσ αιει (purchase forever, I, 22) holds, but still there are secular variations, especially in individual ontogeny according to Freudenthal in (Freudenthal, 1983). Two sections of this paper are devoted to mathematics, with examples simple enough to be understood also by laics (the authors hope so). The Bak-Sneppen evolution model of species is a valuable starting point for the interpretation of these phenomena.

The linguistic area is another field where the model operates as phylogeny, (especially phenomena of contact). At the level of individual ontogeny, in glottodidactic, structured grammars and systematic thesaurus meet and sometimes clash with methods based on practice and assimilation of microsystems. The authors touched in (Piccinini et al., 2015) a small stretch of encounter between mathematics and linguistics, but the experiment of comparing the two subjects deserves to be resumed and expanded, keeping in mind the work of (Petit-Cocorda, 1985).

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EDUCATIONAL ACTIVITY OF OLDER PEOPLE IN POLAND – SELECTED ISSUES

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Abstract. *This article is devoted to the issues of educational activity of the elderly in Poland. Defining the term “old age” and drawing attention to the issue of human adaptation to old age were the starting points of the discussion. Next, the most important issues concerning the activity of seniors were raised. Further discussed were the conditions and objectives of the educational activity of older people. An attention was also drawn to the role of institutions, promoting education and culture, in supporting the development of seniors. Moreover, the article refers to the results of selected studies of the issues discussed.*

Keywords: *activity, educational activity, education, educational institutions, elderly person, old age.*

Introduction

The increase of the elderly population has contributed to the fact that the issues of aging and old age as a period of life came in the scope of research of many scientific disciplines (Chabior, 2011). The aging of population is, undoubtedly, one of the main social, political and economic challenges of many modern countries. The problem concerns, increasingly, also Poland. The aging of population is often treated as a disturbing phenomenon. Seniors are often accused of uselessness and ineffective use of time. Such approach is a serious threat to the elderly, it may lead to their marginalization. An attention is seldom paid to the possibility of using the potential of seniors. Therefore, there is a need to take any actions (at local, regional and national levels) aimed at prolonging professional activities of older people, involving them in social life and providing them with conditions for an independent and fulfilling life (Fabiś et al., 2015, Fabiś et al., 2014). A special role should be assigned here to the educational activity (Adamczyk, 2015, Pikuła, 2015, Halicki 2009).

Nowadays, the idea of lifelong learning is often put in practice in the late phase of adulthood (Fabiś et al., 2015). Adults may educate themselves in various ways, solely or in many types of institutions (Szatur-Jaworska et al., 2006). It should be noted that the old age learning prevents the weakening of human cognitive abilities and enables man's development in various fields. Therefore it becomes an important development tool, it helps improve the quality of life. From social development point of view, the old age learning

provides man with relevant powers to act at the social, political and media levels. It facilitates understanding of other people, getting to know them, communicating and cooperating with them. Education is necessary to maintain or re-determine old man's social identity (Fabiś et al., 2014). The purpose of this article is to review selected problems of the educational activity of the elderly in Poland.

The problem of adaptation to old age

Old age is a natural stage of life, which follows youth and maturity (Trafiałek, 2003). It is an inevitable result of aging process in which biological, psychological and social transformations take place. The beginning of old age is usually acknowledged as 60 or 65 years of age (Zych, 2010). Some researchers distinguish early (from 65 to 74 years) and late old age (over 75 years) (Birch, 2005). The main developmental tasks of old age period include: taking new roles and activities associated with retirement, inclusion into a group of people of the same age, maintaining interest in the world, adapting to progressing physical limitations, adapting to the loss of loved ones, developing a mature attitude towards death (Pietrasiniński, 1997). These tasks refer not only to social development but also to the attitudes towards life philosophy (Jankowski et al., 2003).

Old age should be examined in close relation to the aging process (Banach, 2013). The signs of aging can be determined by chronological, social, biological and psychological age. Chronological age is measured by the number of years of age of a person, it enables determination of age periods and corresponding development standards. Social age refers to social expectations such as behavior of man in old age, his ability of taking particular social roles or his activity level. Biological age is measured by physical fitness of body, as well as by the severity of changes in individual systems and organs. Psychological age is a degree of human mental efficiency and the quality of mental functioning (Steuden, 2011).

An old-aged person faces the necessity of becoming equal to numerous new tasks and problems (Steuden, 2011, Wnuk, 2006). An important challenge for the elderly is, undoubtedly, retirement (Krzyżowski et al., 2014, Pasik, 2006, Czerniawska, 1996). The end of professional activities means new tasks and functions aimed at replacing the job performed before. The gap, resulting from retirement, must be filled with another type of activity (Szczeszek, 2008). According to Wiktor J. Moś: “Preparing for old age should begin in earlier stages of human life. To be more satisfied with life, people of the third age should develop, already in their early age and in the beginning of the adulthood, the habits that – preserved in individual behavior – would be helpful and valuable in old age. These habits may include, among others – frequent contact

with nature, searching for new interests, activity in various spheres of social life. All that, after retiring, in the absence of professional activity, would provide a job” (Moś, 2007, p. 368).

As shown in numerous studies, man's attitude towards his own retirement depends primarily on gender and old age phase. Women are characterized by greater ability to adapt to old age than men, which is usually interpreted as a consequence of frequent experiencing different kinds of stressful situations. Great importance is attributed also to old age phase – with time passing man gains experience that changes his attitude towards life, other people, and himself (Mandrzejewska-Smól, 2012). The scientific literature points to various typologies of attitudes of seniors towards their own old age (Szatur-Jaworska et al., 2006, Muchnicka-Djakow, 1984).

Activity in late adulthood

Gerontologists point to the important role of activity in successful aging, in fact the activity of seniors determines the size and quality of their living space (Halicka & Kramkowska, 2011). The need for being active is one of the most important human needs. Activity is also a condition of fulfilling social roles, functioning in a group and society. The lack of activity may cause the loss of other people's appreciation and, consequently, lead to isolation (Szatur-Jaworska et al., 2006).

The activity of older people is strongly linked to the need of individual development, self-esteem, affiliation, realization of life plans, adapting to variable environment, social expectations, as well as one's own abilities. The type of activity depends not only on individual preferences, health, skills, it also reflects the social context, the expectations and abilities of the environment in which an individual exists (Steuden, 2011). The factors that may determine the activity of the elderly include gender, education level, the influence of family environment, health and physical condition, material living standard, place of residence, the influence of cultural institutions (Szatur-Jaworska et al., 2006). Among the factors that may inhibit the activity of man in old age are: mental and social isolation, low material living standards, transformation of environmental conditions, low health education level, lack of appropriate forms of recreation, insufficient preparation for old age, bad attitude to old age and the elderly (Orzechowska, 1999).

The activity of seniors can be generally divided as follows: formal activity (e.g. membership of a social association, interest in politics, working for local community, volunteering), informal activity (e.g. contacting with family, friends, colleagues, neighbors), and solitary activity (e.g. reading, watching TV, developing various interests) (Halicka & Kramkowska, 2011).

As for the fields of interest, the following types of activity of seniors are distinguished: home-family activity (performing various activities associated with household running and close family life), cultural activity (e.g. reading, listening to the radio, watching TV), professional activity (which satisfies the need of recognition, usability and usefulness, and protects from lowering social status), social activity (usually typical of the people socially active before, it is associated with acting in a specific environment), educational activity (it enables continuous self-improvement and learning, and promotes the exercises of mind), religious activity (with age, the importance of religion and participation in its rituals are increased), recreational activity (resting, physical activity, doing favorite things in free time) (Szatur-Jaworska et al., 2006, Orzechowska, 1999).

Many forms of activity of the elderly are reckoned among free time activities. As pointed out by Olga Czerniawska, the problem of proper use of leisure time is an important issue of educational gerontology (Czerniawska, 1996). Based on the results of their studies, Małgorzata Halicka and Jerzy Halicki identified the following types of free time activities of seniors: recreational and hobbyistic activity (e.g. sports, gardening, amateur activities, going to the cinema or the theater), receptive activity (e.g. watching television, listening to the radio, reading newspapers; usually this kind of activity is carried out at home), public-oriented activity (social and political activity, and also public activity in a parish), integrative activity (meetings and various forms of activity, especially of the scientific and the social kind, e.g. meetings at a senior club, housewives meetings, classes at the University of the Third Age, meeting friends), and other activities (Halicka & Halicki, 2002).

Releasing the activity of seniors is an important pedagogical problem. What matters is if and to what extent the activity of the elderly can be stimulated. According to the main principle of the theory of activity, active lifestyle helps improve mental and physical condition of man. For pedagogists, the theory of activity is a starting point of the search for the ways to activate the elderly (Mandrzejewska-Smól, 2012, Czerniawska, 1996). Activation is understood as a process aimed at achieving specific goals, as well as the result of the process, and the achievement of the objectives. General objectives of man activation include: maintaining physical fitness and health, empowerment, preparing for community life, keeping the faith in the meaning of life, developing various interests, development of personality. In the process of activation each person should be treated individually and subjectively (Mogielnicka, 2007).

Educational activity of seniors

The important roles in adaptation to old age are played by cultural and educational activities. Their key forms include: the realization of individual interests and cultural needs, the content of which is determined by previous lifestyles; amateur and hobbyistic activity (individual or in a group); reading and mass culture content reception (Szatur-Jaworska et al., 2006).

Based on the review of the researches and analyses (Mandrzejewska-Smól, 2012, Brzezińska, 2011, Szatur-Jaworska et al., 2006, Halicka & Halicki, 2002), it is clear that the most popular among Polish seniors are the receptive activity (watching TV, listening to the radio, reading newspapers – usually at home) and the integrative activity (especially meeting friends). The seniors are mainly active in the area of family life, and their participation in public and social life is small, also their interest in the educational activity is relatively low. They are dominated by passive attitude, apathy, exclusion from life.

The learning today means not only the participation in organized forms of education, but also the acquisition of knowledge in everyday life situations, deriving it from one's own and other people's experience, to get to know oneself and the world around. The involvement of seniors in educational activity is strongly connected to the problem of adaptation to old age. Education helps older people understand ongoing changes, it enables proper functioning in the contemporary reality (Mandrzejewska-Smól, 2012). It should be noted, however, that educational activities, directed at seniors, can be more efficient if an elderly person, in his entire educational biography, is adequately prepared for retirement. The attitude of openness towards educational activities is very significant in this regard, as well as the awareness of the role of lifelong learning and methodical preparation for self-studying (Fabiś, 2006).

Intellectual capabilities of seniors are much larger than it is stereotypically assumed. Older people, however, learn differently from young people. It results from their preparation, training, input abilities or motivation, rather than old age itself (Fabiś, 2006).

As held by Zofia Zaorska: “The specificity of older people's learning is, among other things, about the fact that the elderly, to a much greater extent than young people, compare their actual knowledge with what they learn from the lecturers. Also, they get more emotionally engaged, listening to a particular lecture. They like to admire, marvel, be moved, and also to think, ponder over their personal opinions on the topic” (Zaorska, 1997, p. 25).

The factors, which determine the educational activity of seniors to the greatest extent, include: preparing for the period of old age, health status, social and educational experience, mental abilities, personality traits, free time, self-esteem, a sense of meaning in life, motivation to learn, training improving

mental performance, economic situation, environmental stimulation, cultural and educational offer directed to the elderly (Fabiś, 2006). On the other hand, the important factors that may hinder older people's learning include, among others: reduced sight and hearing efficiency, or intellectual changes, e.g. creativity decline, word association difficulties, generalization and abstraction difficulties (Fabiś et al., 2015).

Due to mental fitness retainment till the late years of life, older people's learning is not just possible, but also necessary. Therefore, the issue of the education of seniors should be investigated in the perspective of change, rather than elimination or reduction of educational activities. It may be assumed, generally, that the purpose of education of older people is better coping with requirements of everyday life. By getting involved in educational activity, seniors have a possibility to increase their income and return to the labor market (e.g. by gaining currently desired skills), to cope better with requirements and problems of everyday life (e.g. by gaining knowledge stimulating initiative and self-reliance), to help other people (e.g. by sharing their experience and supporting other people), to free from the stereotype of the ability to act in late adulthood, they also have the possibility of further development and shaping their identities (Mandrzejewska-Smól, 2012).

According to Jerzy Halicki, the purposes of education of older people are as follows: geriatric prevention (learning should neutralize the aging process, distract man from everyday life and fill his free time), broadening and deepening of knowledge (in this case, updating the knowledge already acquired or completing the knowledge of a specific area), preparing for life in retirement (e.g. through participation in the activities offered by the University of the Third Age), preparing for social activity (e.g. through the activity in charitable organizations) (Halicki, 2000).

There are many educational and cultural institutions in Poland, where older people may satisfy their educational and cultural needs (Panek, 2007). According to Zofia Szarota, “the support to the elderly is provided by instructors of amateur artistic, cultural, and educational movements, as well as by social workers and volunteers often recruited from the pensioners” (Szarota, 2004, p. 74). In Polish educational institutions, mostly the younger seniors learn, especially those better educated. Mostly urban dwellers, and the majority of them are women (Fabiś et al., 2014).

Now, among educational institutions, the University of the Third Age dominates. The number of such schools is still increasing, currently there are about four hundred of them. They are formed primarily in urban areas, just every tenth school is located in the country. And every fifth acts under the auspices of a university, usually a non-publically financed one. The primary purpose of the University of the Third Age is to support the development of

older people through implementation of various educational and preventive activities (e.g. interests and skills developing classes, organization of cultural and recreational events, free time organization, healthy lifestyle promoting activities) (Fabiś et al., 2014). The training has two basic forms – on the one hand, it includes lectures (in thematic blocks), and on the other hand, individual classes (developing passions and interests of the listeners). Grażyna Orzechowska points to the role of the students of the University of the Third Age in shaping their own learning space. They create programs, plan lectures and individual classes, establish contacts with representatives of different circles, gain funds for keeping their activities (Orzechowska, 2013).

New information technologies and foreign languages (especially English) are the most frequently chosen courses by the elderly. Learning how to use new media not only improves the quality of seniors' life, but it is also a way of acquiring fresh knowledge, which facilitates the involvement in other forms of educational activity. Language learning is a useful form of mental efficiency training. Also, it facilitates the communication during foreign journeys and the understanding of words and simple phrases while working with a computer (Fabiś et al., 2015).

There are also other institutions (or initiatives) supporting the development of seniors, through educational, caring, animative or therapeutic activities, at the places of their residence – senior clubs, country housewives' circles, libraries, day care centres, clubs, community centres, parishioner groups, and others (Fabiś et al., 2014).

A special role should be assigned to senior clubs. They constitute the centers of cultural, educational, social and recreational life for the elderly. In some cases, they also perform the function of self-help groups. These centers are intended to establish and maintain social contacts, to form social bonds and, consequently, fight the feeling of boredom and loneliness. It is being achieved through organized occupations, diverse in terms of form, content, and meeting frequency. Also important is the cooperation of the clubs with other institutions and organizations (e.g. schools, hospitals), which facilitates the integration of seniors with the environment (Leszczyńska-Rejchert, 2010). The offer of senior clubs include, for example: circles of interest, educational courses, lectures, organized forms of recreation, exhibitions, participation in amateur artistic movements, competitions in various fields of knowledge, and others. The clubs also enable joint watching TV, reading newspapers, organizing social evenings. The members have the opportunity to decide direction of work (e.g. organization of events, scheduling, inviting guests). Some of the centres get involved in local and regional activities (Szarota, 2004).

Another institution that plays an important role in creating and satisfying the interests of the elderly is community centre. Community centre, among other

things, organizes social gatherings for seniors, excursions, gymnastic exercises. Its work also includes various circles of interest, cabarets, dance groups, bands, choirs (Szarota, 2004).

Seniors' learning takes place not only in educational institutions. An important role should be assigned also to informal education. It is a lifelong process of acquiring knowledge, skills, improving competence, forming attitudes, through personal experience gained in various environments in which an individual exists (e.g. family, local community, work environment) (Fabiś et al., 2015). According to Artur Fabiś, “it is a natural process, which takes place unconsciously, in the activities of everyday life, through experience and as an occasional activity” (Fabiś et al., 2015, p. 196).

Therefore it is worth making efforts to encourage seniors, as many of them as possible, to take up educational activity. An important role in this area should be played primarily by the actions aimed at education animating, promoting it among older people, and specialized preparation of the creators of this education and the people nursing seniors (Mandrzejewska-Smól, 2012). The educational policy towards older people should be dynamic and varied, it should take into account the specificity and the individuality in the process of aging (Fabiś, 2006). Creating conditions for seniors' informal learning and promotion of cultural and recreational activities, which allow learning through action, are particularly important (Fabiś et al., 2014).

It is worth noting, in conclusion, that the education of seniors “should be understood widely, as the science of all forms of knowledge, skills and attitudes contributing to prosperity, quality of life, and life satisfaction achieving” (Szatur-Jaworska et al., 2006, p. 169).

Conclusions

It may be concluded from the foregoing that the educational activity plays very important role in the lives of contemporary seniors. It serves older people in achieving independence, it helps them improve life quality. It is also, for many of them, an important way of self-realization.

In summary, it can be seen that various forms of educational activity enable today's seniors, or at least make easier, to develop individual interests, to satisfy cultural and educational needs, to increase their chances of returning to the labor market, to cope with requirements (problems) of everyday life, to provide assistance to others (including the elderly), to establish and maintain social contacts, to be rid of old age stereotypes, to achieve life satisfaction. It is vital, however, that actions are taken to promote education among seniors, to create appropriate conditions for educational activity, to point various opportunities in

this respect, and to stimulate them with expertise. This should be provided by, among other things, dynamic educational policy for the elderly.

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LEARNING AS PRECONDITION TO STAY ACTIVE IN LABOUR MARKET FOR ELDER PEOPLE

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Abstract. Nowadays society is getting older in European countries. Technologies, speed of life requires higher level of abilities and competencies. People who are 55 and older are very experienced in their workplace but some of them cannot catch changes in their professional area. Quantitative research results demonstrate that learning is one of important factors which helps to stay active in labor market for longer time. People participate in different learning activities to get more professional competencies or to change qualification, to get higher salary or learning was required from employer. The main barriers for learning were mentioned: lack of time, no needed learning at all and lack of information. People who have longer tradition and personal motivation use different learning ways more often, and they say that learning as precondition to stay active in labor market for elder people.

Keywords: adult learning, elder people, labour market, motivation.

Introduction

Different authors and specialists differently define a limit, where the advanced age starts. The age, may be defined according to social roles in society, physical abilities and appearance (Brazienė et al., 2014, Cantwell, 2007), as well as senior citizen's health depending on his/her biologic age. However, the perception of the said age is based on an individual's subjective feeling, i.e. what age an individual feels he/she is irrespective of his/her actual years. However, based on a psychosocial human evolution theory by psychologist Erikson (1963) refers to the period of 40-65 years of age as middle adulthood, which is related to work, parenthood, whereas the period from 65 years of age is referred to as late / older adulthood (Brazienė et al., 2014).

In 1983 the World Assembly on Ageing suggested a demographic criterion of ageing – 60 years – as a boundary line between the middle and older age people (Koncėvičienė et al., 2013). An older age criterion approved by the UN is the age of 60, whereas according to the World Health Organization's standard – the age of 65 (Guidelines of the National Demographic (Population) Policy Strategy). According to Bražiūnienė, where analyzing the occupation, people from 55 years of age could be regarded as persons of older age. The unemployed precisely of this age are attributed to a group of additionally supported persons.

This age limit is also distinguished by the European Commission, which see a 55 year old or older person as an older employee (Brazienė et al., 2014). “55 year old and older residents of Lithuania are regarded as persons of older age, except persons specified in the Descriptor of the Field of Mental Health Improvement, who are regarded as older being 45 years and older due to mental health specifics and changes [...]” (“The Action Plan for Healthy Ageing Protection in Lithuania 2014–2023”, 2014).

According Ilmarinen (2012), though, as people get older, their health usually worsens and physical capacity decreases, short-term and long-term memory important for the acquisition of new knowledge as well as ability to focus deteriorates (Charness & Czaja, 2006), a few other functions of human body strengthen with age. Increasing intellectual competence is the advantage of an ageing person. Moreover, older employees are more devoted to their work and better in grasping the essence of work. Thus, despite various physical changes and diseases, with age older employees become better and stronger in many aspects. All of the aforementioned characteristics make older persons not only the best employees, but also enable efficiently acquiring new knowledge, improving competencies, i.e. can be very useful in the educational process.

And though, as revealed by research of Charness & Czaja (2006), contemporary older people are active and want to be a part of social and economic life and working life has a strong influence on physical and psychological health of older people, also social and personal life of such people as well as its quality, however, based on surveys carried out in Lithuania it is often stated that older age becomes a problem in the context of social inclusion (involvement) in the labour market due to the age discrimination, health problems, as well as the lack of modern abilities of older people. The age discrimination acquires various forms in the labour market, i.e. discriminatory job ads, absence of retraining opportunities for older people, redundancy before the retirement pension. Survey carried out by Eurobarometer reveals that 50-55 year old and older persons on the labour market are forced to fight with negative stereotypes, when older persons are referred to as inefficient, inflexible, unable to adapt to innovations, and lagging behind technological progress (Eurobarometer, 2012).

The aim of this article is to discuss the motivation for older (55 years and older) persons to study in order to remain active on the labour market. Research methods – the analysis of scientific literature and questionnaire survey.

Motivation for older persons to study

Survey carried out by Statistics Lithuania in 2006 demonstrated quite high motivation of older people for work, which could be strengthened by greater

vocational training opportunities (conditions for improving qualification), wider selection of atypical occupation forms, and adaptation of workplaces to the changed physical abilities of older people (Okunevičiūtė-Neveauskienė & Moskvina, 2007). Older persons registered with the employment exchange is a different story. As demonstrated by the survey “Analysis of the situation of hard to integrate persons on the labour market and means for increasing their occupation”, present-day’s older unemployed people registered with the employment exchange are not regarded as a very big reserve, which could replenish the labour market later, in the retirement age. Trying to plan what is the chance that present-day’s older unemployed people will be willing to participate on the labour market, when they have reached retirement age, almost 70 % are not willing to work, when they get the retirement pension. Meanwhile one third (30 %) of older persons would be ready to continue to work even getting pension. A conclusion could be drawn that the motivation for older clients of the employment exchange to work is weak – a significant percentage wishes to end their working career as soon as possible and does not plan to be a part of the labour market in the retirement age (Okunevičiūtė-Neveauskienė & Moskvina, 2007, p. 238-239).

Adult education volumes in the country and learning efficiency first of all depend on motivation to study, therefore, it is important to assess the factors of external and internal motivation for older people to study. Motivation is characterized by two things: need (as an internal aspect of motivation) and goal (as an external aspect of motivation). Need – the main source of activity of an individual – encourages an individual’s activity and search for the objects, which could satisfy him/her (Descriptor of Competencies of Expert Assessors, 2007). According to Beresnevičienė (1996), the existential and safety needs are the ones to encourage an individual to adapt in the ever-changing society and to adjust to the market requirements. Unemployment and changing requirements for a specialist force an adult to change his/her profession, to retrain, to learn or improve as a specialist at colleges or higher education institutions. On the other hand, according to the aforementioned author, as a personality develops and continually learns from own life and the life of others, such higher needs of striving for self-actualization and developing intellectual as well as creative powers form as well. This causes a need for self-expression (self-actualization). This need is recognized as a universal need of Homo sapiens, moreover, it is also a prerequisite for mental health (if not self-actualization it self, then at least a feeling of moving in this direction) (Descriptor of Competencies of Expert Assessors, 2007). Learning needs can often be subconscious, unperceived. Often a symptom of such condition is dissatisfaction with the current situation, lack of self-trust, lack of trust in own expertise, failure to see the perspective, in the worst-case scenario – a feeling of frustration (complete helplessness), also

aggression, search for the guilty (e.g., inappropriate system, etc.). Without denying the fact that in most cases the established cultural norms (e.g., what is surmountable or not surmountable by a disabled person) or financial circumstances (e.g., in general in the state, provided or non-provided financing of professional competence improvement activities) are the essential conditions of his/her situation, which do not change an individual's will, we should not leave out the fact that sometimes an individual simply cannot envisage possibilities of changing the situation on his/her own initiative. Therefore, the dimensions brought and the intersection of dimensions of the requirements of surrounding environment are particularly important, since an individual can take a decision that nothing can be changed, that the circumstances are invincible, and choose:

- denial and related psychological, socioeconomic, and such other consequences (e.g., health deterioration) or
- exploration of his/her potential and possibilities to increase it through, for example, learning (Descriptor of Competencies of Expert Assessors, 2007).

It could be stated that the motivation for adults to study is influenced by different needs: changes in the labour market needs, internal self-realization needs of an individual, i.e. both external and internal factors. Motivating *internal factors*, based on the Adult Education Development Scenario (2011), are the importance of need, profundity of interests, attitude towards the object of learning and its place among the values of life, individual traits of a person. Internal motivation of an individual was emphasized by the representatives of humanistic psychology Maslow and Rogers. According to them, every single person has his/her internal “principle of growth”, which navigates the behavior. According to Maslow, education has to be person-oriented, help him/her to express himself/herself and become a better person. Education also has to help him/her to identify himself/herself, to discover his/her vocation, to learn to feel the value of life, to get the feeling of success, to learn to make a right choice. Such internal, continuously increasing motivation, which encourages independence, proactiveness, and responsibility, according to Maslow, only emerges at the highest stage of the hierarchy of needs – at self-actualization level. Motivation for learning creates a general mood for learning, whereas specific learning steps will depend on the chosen goals (Descriptor of Competencies of Expert Assessors, 2007, Butkienė & Kepalaitė, 1996). *External factors* are the influence of other persons, appeal and significance of the object in an individual's personal life, surrounding geographic and social environment, as well as learning opportunities. According to the data of survey carried out by the Lithuanian Association of Adult Education, adults in Lithuania react to certain external factors of motivation (better job, promotion, higher salary, etc.),

however, the most powerful factors are internal factors (a wish to get greater satisfaction from work, self-esteem, quality of life, etc.) (Adult Education Development Scenario, 2011). Where distinguishing and generalizing the aspects of motivation for older persons to study, it could be stated that external factors of motivation serve as significant incentive for older persons to study and improve professional and other competencies and knowledge (especially a clear understanding of the ever-changing and increasing requirements of the labour market), however, with reference to the surveys, internal factors often prevail as well: striving for improvement, broadening horizons, self-realization, communication with other persons of similar age, as well as networking. Older persons, who are already employed, earn higher income, and have higher education, are the ones to study and improve their qualification in Lithuania more often, meanwhile persons, who are unemployed and earn lower income, as well as older persons, who live in rural localities, have relatively low motivation to study. Thus, here it could be assumed that motivation can be related to not only internal and external motivating factors, but also to the availability of learning opportunities, i.e. older people, who live in rural and more secluded localities, may have a view that the education is inaccessible or hardly accessible to them, therefore, they are not motivated to even consider the opportunities for training.

Empirical research methods

Research was carried out in February of 2015. A research instrument – questionnaire – was prepared on the basis of theoretical analysis and contained parts aimed at the identification of: reasons for learning (failure to study), motivation for learning, learning methods, and activity on the labour market, with reference to the instruments used by Mockus, Žukaitė (2012), Tamutienė (2009), Juozulynas and others (2010), Dollisso, Martin (1999), Brazienė and others (2014). Cronbach's alpha of individual parts varies from 0.784 to 0.904.

Since it was a pilot research, it was aimed at purifying the instrument and identifying general tendencies.

Data was collected by direct survey, by explaining the purpose of research to each respondent individually and presenting the questionnaire in accordance with the principles of voluntary participation. Descriptive statistics and nonparametric criteria (chi-square criterion, Spearman's rank correlation coefficient) were applied to the analysis of research data.

Quantitative research results

Research covered 102 respondents from Kaunas, Vilnius, and Telšiai counties, where of women – 91.2 percent, men – 8.8 percent.

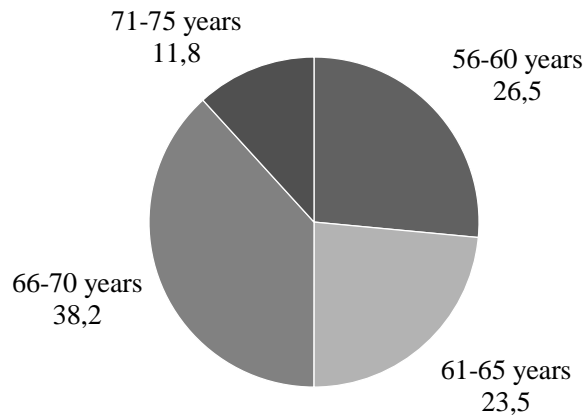


Figure 1 **Distribution by age (%)**

The respondents were persons over 55 years of age, therefore, it is interesting to take note that most of respondents, who completed the questionnaire, were 66-70 year old persons (the oldest were 75 years of age, fig. 1). 70.6 percent were pensioners, 29.4 percent – not pensioners.

Duration of employment of most of respondents is over 30 years (38.2 percent), a significant percentage have been employed for over 20 years (26.5 percent, Fig. 2).

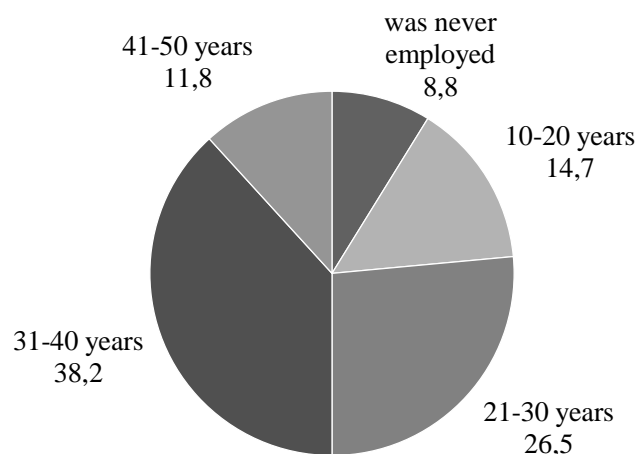


Figure 2 **Distribution by duration of employment (%)**

Currently employed constitute 44.1 percent, unemployed – 50 percent, 5.9 percent did not answer. Two thirds have the university education, 2.9 percent of respondents have not acquired any profession.

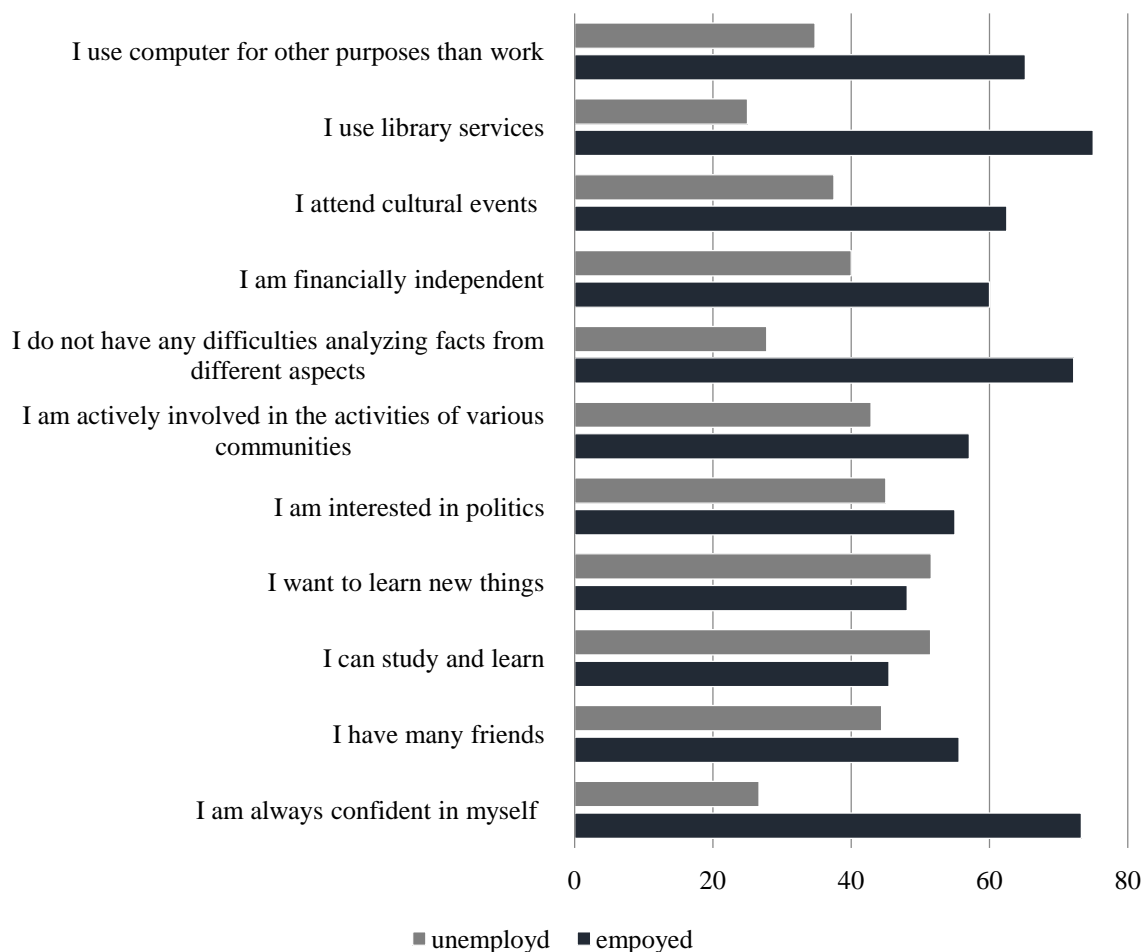


Figure 3 Assessment of emotional and social environment (%)

Since the respondents are older persons, it is important to assess their emotional environment, social activity, and ability to adapt to the ever-changing environment. It is evident that in most cases currently employed persons are more adapted to changes (most of them have computer skills, are able to analyze facts, are more actively involved in the community activities, are more interested in politics), which gives them more self-confidence and guarantees a bigger circle of friends. However, the unemployed have not lost their wish and more often indicated that they would like to and could study new things. In all cases a statistically significant difference between the employed and the unemployed persons was identified (chi-square test $p < 0,05$, Fig. 3).

Most of the unemployed are already of the retirement age and, therefore, are no longer employed. However, approximately fifty percent of respondents indicated that they were dismissed because of their age, for some of them their health is an obstacle. It is interesting to note that over 20 percent indicated that they do not care about work (Fig. 4).

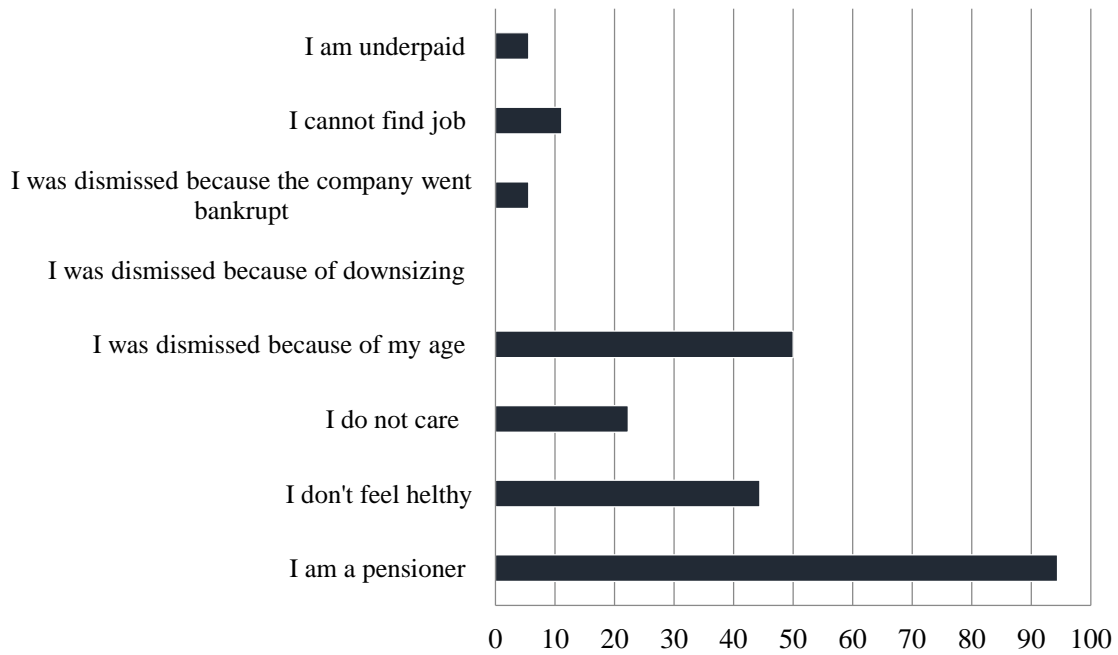


Figure 4 **Reasons for not working (%)**

All persons in work indicated that they work because they like their professional activities and also for better financial opportunities. A significant percentage indicated going to work as a formed long-term habit. Approximately fifty percent of respondents indicated that going to work is a way for them to spend their free time or to “escape” from home environment (Fig. 5).

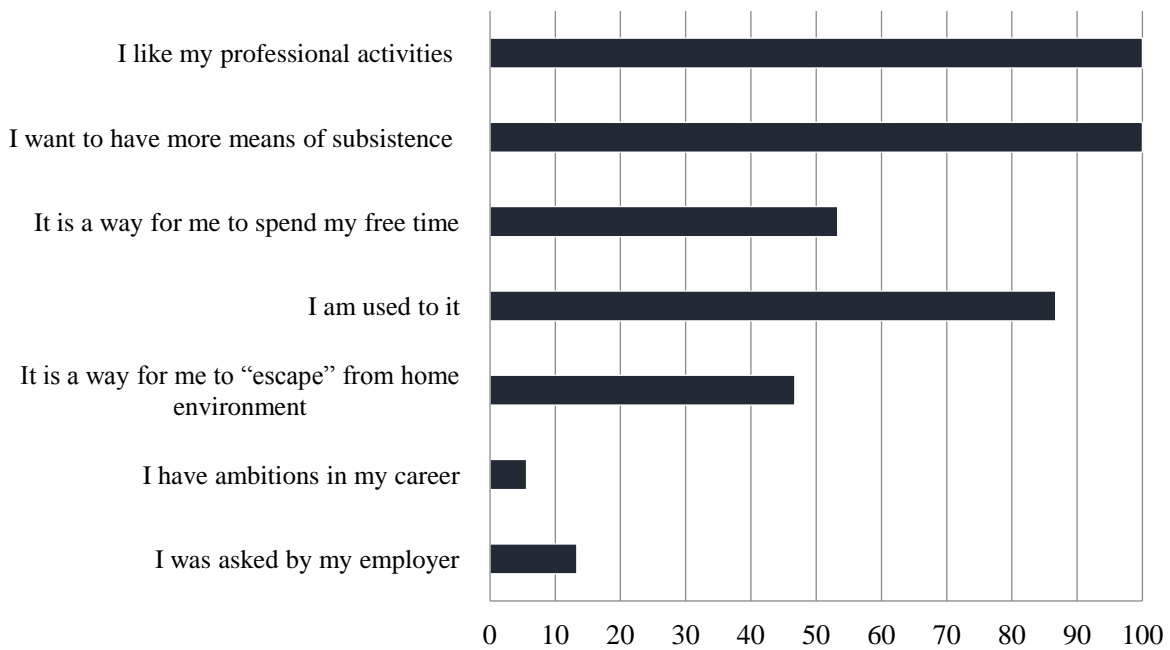


Figure 5 **Reasons for working (%)**

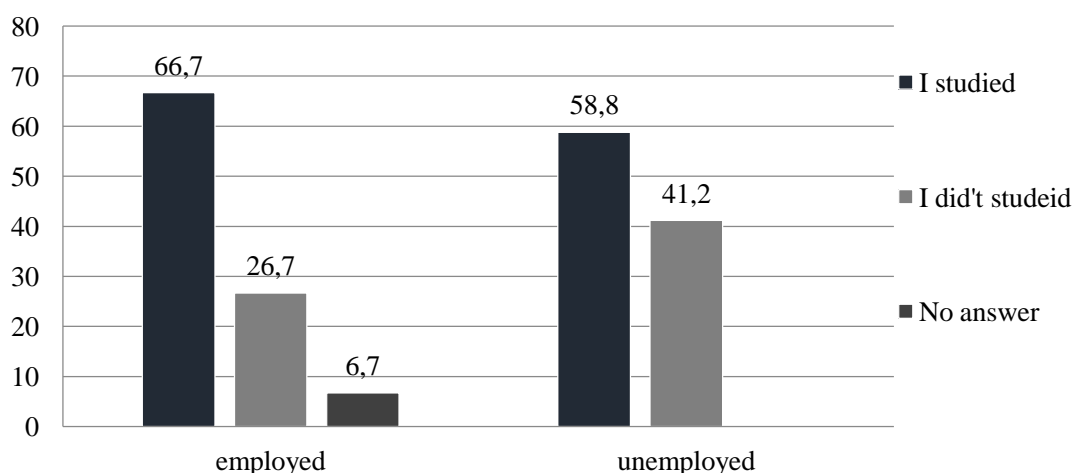


Figure 6 Studying over the last year (%)

The majority of both employed and unemployed older people indicated that they have undergone studies, however, this percentage is slightly bigger among the persons in work (statistically no significant difference was identified, Fig. 6).

The reasons expressed by the employed and the unemployed why they study varied in most cases (Fig. 7). Persons in work often indicated that they were sent from the employment exchange, they need to acquire qualification and want to earn more. A significant percentage of the persons in work say they have discovered their vocation and, therefore, wanted to study some. Non-working population also indicated that they studied (during their employment), because they were sent from the employment exchange, by the employer's instruction, or they needed it for the additional job. They wanted to study, because they used to like studying earlier; a favorable price was an important factor as well. However, the motivation for the persons in work to study is higher in most cases, though it is often related to their professional activities.

All persons in work, who currently do not study, state that now they do not have any need and do not see any sense of studying. However, over 90 percent (Fig. 8) stated that they lack information on training and confidence (more than non-working population) and it is hard for them to combine with their family. For non-working population it is the main reason for not studying. Also, one of the obstacles is high prices of training.

Following the completion of dependency analysis it was identified that persons with the university education are more willing to study (chi-square test $p=0,044 > 0,05$).

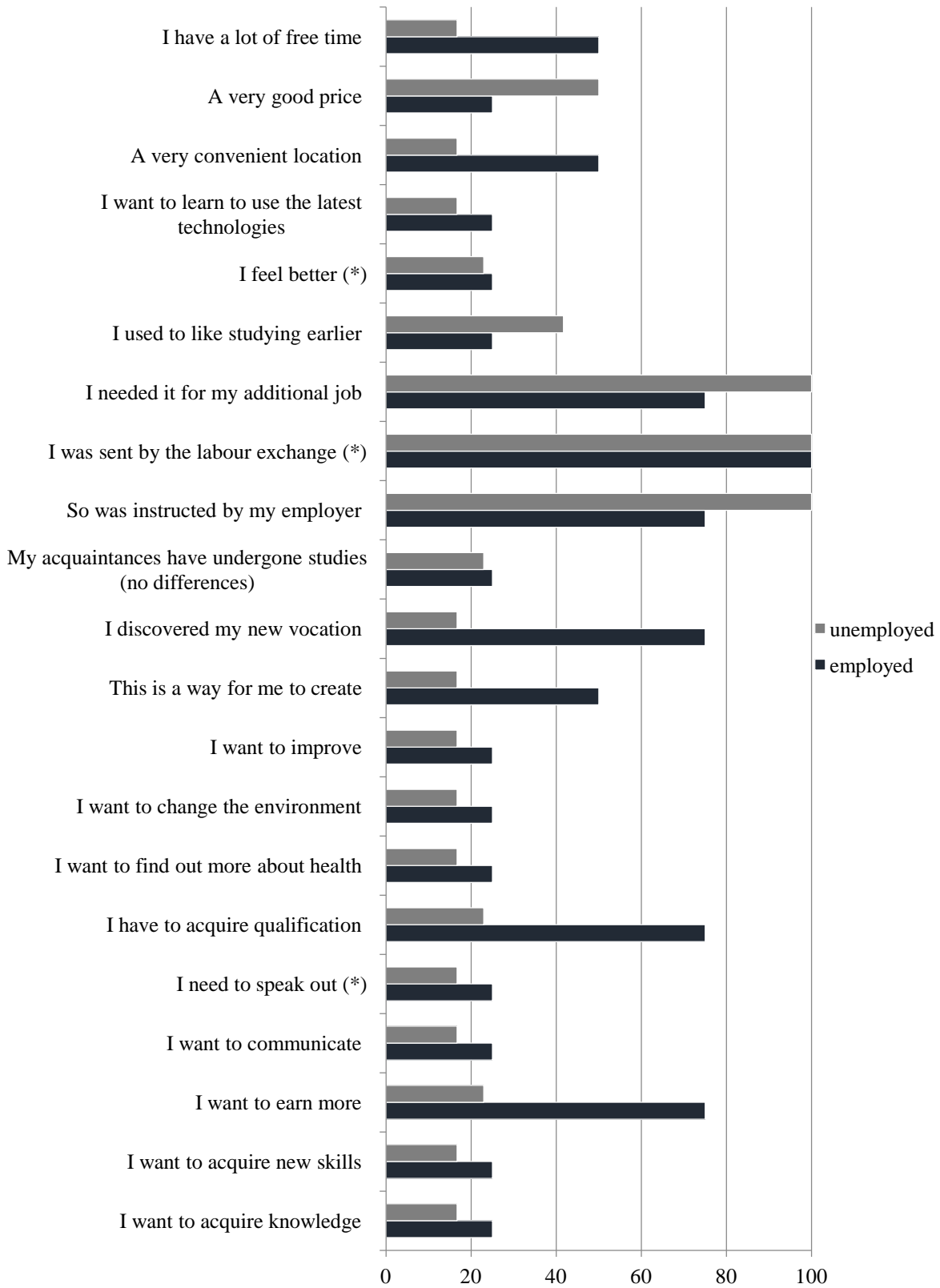


Figure 7 **Reasons for studying** (% , * means “no significant differences”)

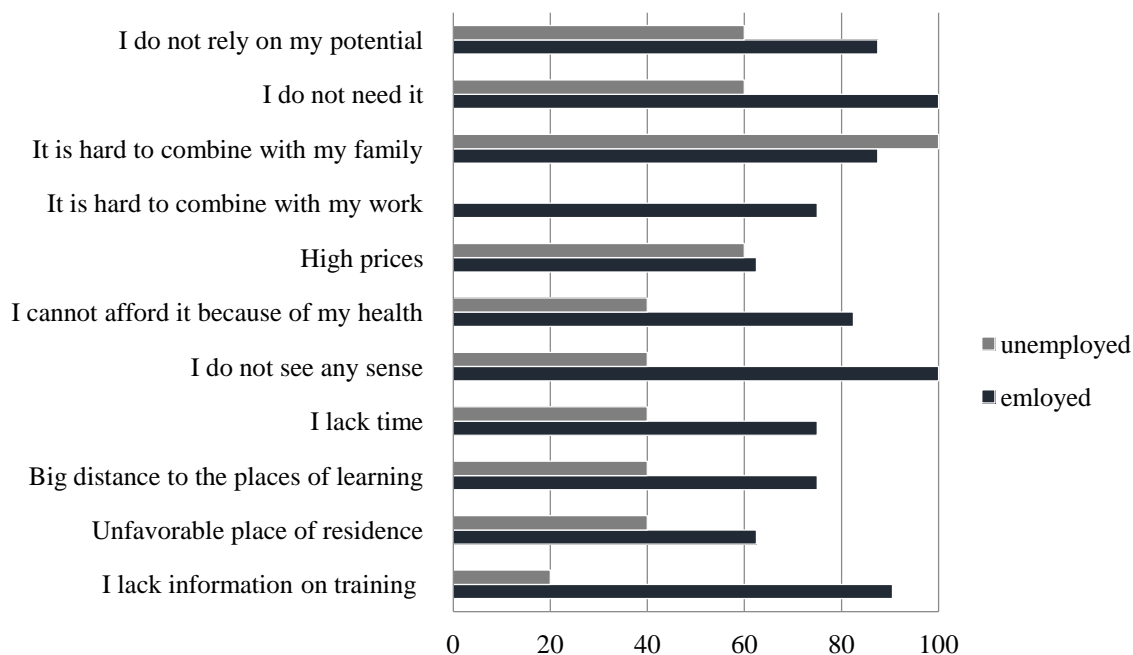


Figure 8 Reasons for not studying

Conclusions

External motivation factors are the ones to significantly encourage older persons to study and improve their professional as well as such other abilities and knowledge (especially clear understanding of the ever-changing and increasing requirements of the labour market), however, based on the analysis of scientific literature and surveys, we often see the internal factors prevailing as well: striving for improvement, broadening of horizons, self-realization, communication with other persons of similar age, and networking. Research results demonstrate that older persons, who are already employed, earn higher income, and have higher education, are the ones to study and improve their qualification in Lithuania more often, meanwhile persons, who are unemployed and earn lower income, as well as older persons, who live in rural localities, have relatively low motivation to study.

Quantitative research revealed that older persons in work are more adapted to the environment and technological changes, they are also more self-confident. Most of respondents are pensioners, who cannot successfully work because of their health problems or the fact that they were dismissed because of their age. Most of persons in work like their professional activities, which give them more financial resources. Both employed and unemployed persons are similarly willing to study. For the employed it is mostly related to their professional activities, whereas the unemployed are mostly sent from the employment

exchange or need it for their additional work. The persons in work indicated both external and internal reasons as the obstacles. External reasons were more indicated among non-working population.

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EXPERIMENTING PARTICIPATIVE E-LEARNING IN NON-FORMAL ADULT EDUCATION: THE ESCALADE PROJECT

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***Abstract.** This paper presents the research approach designed for EScAlADE, an EU funded project that sees the participation of five European countries and focuses on adult participative e-learning. EScAlADE aims at investigating about the educational needs of adults (range: 50-65 years) involved in e-learning programs. This paper reports on the projects methodology and on the necessity of educational strategies able to provide adult trainees with the skills required by the labor market.*

***Keywords:** Participative e-learning, non-formal education, Long-life learning, research project management.*

Introduction

In 2012, the unemployment rate for low-qualified adults was 16.8 %, compared to 8.6 % for the medium-skilled and 5.6 % for the high-skilled group (Eurostat, 2013). Lifelong learning is still considered one of the main ways to stay in the labor market or to find a new job but many adults - especially workers in the range-of 50-65 years, who lost or are about to lose their work are low skilled; they come from a low profile job and they are unused to attend training courses (McKenzie & Wurzburg, 1997; European Commission, 2009; Stephenson & Yorke, 2013; Fejes, 2014).

Generally, people are not attracted to formal or non-formal educational programs, although in some cases they are „forced” by national policies to attend professional refresher courses, workshops and short study periods. Often participants attending forced trainings leave them before completion, since they get bored and deem them of any usefulness.

Accordingly, the re-employability of these people appears difficult, particularly in a quickly changing society. In this perspective, the definition of new learning approaches which are able to not discourage learners and take into account the possibility offered by the new technology becomes strategic.

There exists a wide literature on participative learning, but it tackles issues tied to the mainstream face-to-face approaches (Gorodetsky & Barak, 2008; Connolly, 2008; Percy, 2015; Sharp, 2015).

What about the possibility of transferring a participatory approach in an eLearning environment? May this approach provide the means to limit the courses' dropout by adult learners?

The EScAlADE project

EScAlADE is an Erasmus + Strategic Partnerships KA2 project funded by European Union which involves five partner from five European countries (Italy, Latvia, Poland, Greece and Spain). It started at the end of 2015 and aims at investigating about the benefits of a participative learning approach in non-formal adult e-learning programs.

The Consortium is formed by 1 University, responsible for methodology and research, and 4 NGOs expert in non-formal educational which will experiment a participative e-learning training course. According to the declared, each partner will contribute to implement the EScALADE project with different/complementary skills and expertise.

Objectives which have been identified in the project proposal are:

- to find the most appropriate and efficient methodology for the target people of the project;
- the improvement of adult education methods, overcoming the digital divide occurring in an IT-based participatory approach;
- the enhancement of adult learning effectiveness by removing the impact of negative factors into adult learning groups;
- to attract adult people to training systems in order to reduce the level of low qualification;
- to improve a type of training more appropriate to respond to the current labour market challenges (expulsion from the labour market, new jobs, new skills to be re- employed);
- to experiment tools for supporting and facilitating adult learning when an active/ participatory strategy is adopted.

The main activities that will be undertaken are:

- Research about the most effective training methodology for low qualified adult/elderly people expelled from the labour market or people who are about to lose their jobs.
- Special focus on participatory learning and Web learning communities.

- A participative e-learning experiment in order to test the theoretical foundations of participative learning in an ICT-based environment.
- Definition of a multimedia guide and course contents:
- Proposals, recommendations, educational tools to carry out efficient courses directed to the target group of the project; contents should be organized by means of an interactive software programme.
- Trainers' training session, designed to evaluate the effectiveness of the active/participatory learning methodologies.
- Delivery of the experimental course.
- Refinement of the multimedia guide and training program according the project results

From EScAlADE project, it is expected that:

- institutions involved in adult education will benefit of the research and experiment outcomes and will exploit them in their current educational activity.
- tools will be identified aimed to help both trainers in performing their job and adult/elderly in attending courses.
- a significant impact will that place at a wide range stakeholders (temporary agencies, adult education institutions, national and international institutes for professional training, employment services).
- methodologies used can stimulate the re-employment policies, e.g. facilitating the involvement the adult/elderly people in the process of re-thinking themselves in a new labor market contest.

The methodology

The research design is vital in an experimental project while the methodology is essential for performing a research. Our approach grounds on a desk research and a survey based on a questionnaire and semi-structured interviews to a small sample of key subjects.

The output of our research will be the identification of the most efficient learning methodology for low qualified adult/elderly people expelled from the labour market or people about to lose their work focusing, especially, on the efficiency of participatory/active learning methodologies (see figure 1).

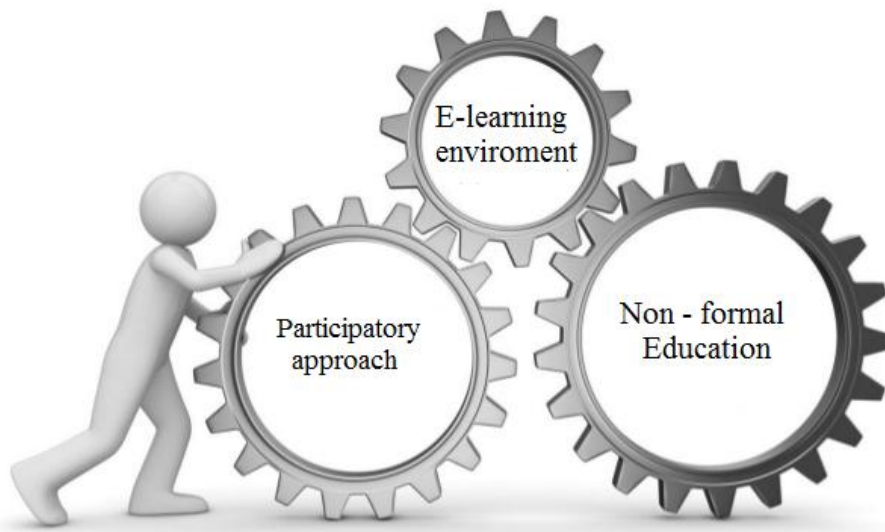


Figure 1 Project methodology

The analysis of adult-elderly learning methodologies will be organized in a public document. It will include basic literature, examples and initiatives of the training centres related to the project issues. It will also gather information, programmes and initiatives related to the project scope, taking into account that one of the objective is the development of a multimedia guide, a sort of a framework containing reference to contents about adult-elderly education as well as best practices and recommendations. Namely:

- The context of participatory/active learning in adult learning environment;
- Methodologies, techniques, etc. that can be applied in adult participatory/active learning; analysis of the claimed benefits; identification of main costs in participatory/active learning;
- Concepts that should be known by institutions, educators, trainers, teachers etc. about adult participatory/active learning - it will be considered the outcomes contained in EU documents, guides, etc., (DGEC, 2012).
- The role of Information and Communication Technology (ICT) in participatory/active learning and their contribution as a tool to facilitate learning;
- Best procedures to measure the benefits and costs in the actual application of participatory education approaches;
- Problems, barriers, etc. in adult participatory/active learning;
- New skills for courses preparation by using a web participatory approach.

It will be adopted a research methodology which provides the execution of the following preliminary tasks:

- Collecting, data, evidences and information about adult-elderly European projects envisaged to learning methodologies;
- Online survey in the field of adult web participatory learning;
- Gathering of best practice examples in participatory learning.

Since all partners have a wide background in adult education, they will contribute to the creation of the basic data source.

The research will continue with the analysis of collected materials and their classification, e.g. on the basis of different educational and learning actors, learning topics, reference to methodologies or approaches, use or not of new technologies, geographic area, learners age and social status, etc.

Particular attention will be paid to Peer-Assisted Learning Strategies (PALS) which is deemed to be a simple way to engage students in paired reading and discussion of any text. The PALS method will be applied in our training course in order to test how it can be useful in an ICT-based educational program. On this purposes, a chat room will be implemented for emulating the participatory approach. A teacher will assist learners.

The research will provide:

- Comparing data with the literature findings and the survey results;
- Structuring data and data dictionary;
- Pilot experiment detailing;
- Organizing outcomes; conceptual maps, links, cross references, etc.;
- Recommendations list;
- Multimedia guide functional design;
- Usability requirements;
- Mapping the target group interests into the multimedia guide contents.

The research will present the differences encountered in adult-elderly learning methodologies, especially participatory/active learning.

A questionnaire will be prepared and submitted to our target group and semi-structured interviews will be conducted on a selected sample of educational key institutions. The same questionnaire will be used to collect information about the diffusion of web learning technologies. A public document will be produced containing a structured description of best practices in adult-elderly scope.

All the experiences collected will be analyzed and will be chosen the most appropriate and succesful. Will be analyzed the behavior of web learning communities, the digital barriers and the way used in a participatory context to overcome the problems that can affect a participatory learning approach in an

ICT context. There are considered also the group dynamics that can affect learning groups.

EScAIADE research framework:

The process adopted to collect information foresees different steps and follows that of the applied research. The differences between basic and applied research have been summarized by Rajasekar, Philominathan and Chinnathambi (Table 1).

Table 1 **Differences between basic and applied researches** (Rajasekar et al., 2013)

Basic research	Applied research
Seeks generalization	Studies individual or specific cases without the objective to generalize
Aims at basic processes	Aims at any variable which makes the desired difference
Attempts to explain why things happen	Tries to say how things can be changed
Tries to get all the facts	Tries to correct the facts which are problematic
Reports in technical language of the topic	Reports in common language

The central aim of our research is to find solutions for the practical problems that arise if you try to apply a participative approach in an e-learning training. This not prevent the attention to theoretical issues. We are persuaded that practical solutions should be grounded on theories and scientific knowledge. Nevertheless, scientific knowledge need observation and data.

Our applied research was also necessary to evaluate the implementation of a participative approach in an ICT-based learning environment. Among issues we also include the cost of the on-line support of trainers and tutors and the difficulties of conciliating the peculiarity of the e-learning approach and the exigency of synchronizing the learning activity between trainees and trainer.

The research has been divided in two sections:

a. Desk research: Adult non-formal learning

The aim of the desk research is to create the knowledge base necessary to support the project development. In particular, the transformation of traditional training courses in ICT-based participating learning courses.

All partners ought to collect data in order to produce a structured picture of the adult education in their own country, focusing on non-formal learning and

ICT- based learning. In fact, in the labor world, one assists to the growth of knowledge needed to support the workers' competence. We are persuaded that in the next future non-classroom and non-instructional type of learning will represent a crucial aspect of workers' professionalization. In this perspective, digital applications will contribute to spread the process of knowledge creation, will foster adult learners' collaboration, and will contribute for retaining and improving the productivity of older workers (Gibb & Fenwick, 2008; Kok, 2015).

Data will be organized in a common structure for an easier comparison:

1. Country legislation [Laws / Regulations]
2. Statistics [Number of adult learners involved, gender and age / Learners' preferences / Costs]
3. Education programs [Sectors / Methodologies / Adult educators recruitment / Learning assessment and recognition]
4. ICT [e-learning, distance learning, and hybrid solutions / barriers towards ICT-based adult learning programs]
5. Notes based on the partner's experience [Best practices / Suggestions / Opinions, etc.]

b. Field research:

The project foresees that all partners submit a questionnaire and conduct semi-structured interviews in order to better understand the context where the learning experiment will be realized.

The questionnaire has been defined and the following dimensions will be explored:

1. General information [Age / Gender / Marital status / Place of living / Educational degree]
2. Work situation [Occupational status / Employment sector / Employment duration / Task difficulty]
3. ICT skills [Computer usage skills / Computer ownership / Computer use / Social media / Mobile phone usage]
4. Adult education [Education / Training courses participation / Institutions that organized them / Cost of participation / Satisfaction]
5. Need and expectation [Objective of learning / Subject of learning / Methodology / Informal – non-formal education]
6. Barriers [Learning activities barriers / Type of barriers]

Conclusion

We described the initial phase of EScAlADE, a transnational project which aims at experimenting the participatory approach in an adult non-formal e-learning environment. Although many researchers argued about the importance of both Web 2.0 learning and participating education, at the moment, there are few evidences about how to apply participative models in an ICT environment (Bakia et al., 2012; Mavroudi & Hadzilacos, 2013).

Our experiment has been defined to be used as a starting point by those who are involved in adult-elderly education.

For this purpose, one of the deliverables of EScAlADE is a multimedia guide: it has been designed as a tool for receiving new materials and new data. It will contain the necessary specification to perform active / participatory courses and will describe how these courses should be organized, how teachers should be trained, how learners should be supported and evaluated. The multimedia guide is conceived as a practical guide which assist staff involved in adult education. At this research stage, its main functional features have been defined, as well as its capabilities, appearance, and interactions with users. It will present an interactive user interface built on the modern usability criteria.

Finally, EScAlADE project rests on the persuasion, agreed by other researchers, that technologies provide many possibilities, but they don't "fix" meanings necessarily (Suthers, 2005). Based on this idea, our research investigates on the practical benefits of a participatory learning approach in an online environment, also tackling the issue of cost tied to the involvement of adults in non-formal learning practices by having digital interactions with others. A cost-benefit tool will be realized for calculating the cost/benefit of a participatory learning approach. It is intended to offer a simple method for evaluating possible improvement options in the design of training courses based on an active / participatory approach.

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THE ROLE OF THE TEACHER AND EIGHT KEY COMPETENCE FOR LIFELONG LEARNING. CASE STUDY POLISH SCHOOL IN REZEKNE

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Abstract. *In this article author present the impact of teacher competences on the role played in school. The object of the research is the role played by the teacher in the State Polish Grammar School in Rezekne. In order to compare theory with practice, empirical studies have been conducted in the two - month practice in State Polish Grammar School in Rezekne, which were completed within the practice of Erasmus+.*

Keywords: *school, teacher, teacher's role, competence, lifelong learning, cultural borderland.*

Introduction

The aim of this paper is to show what kind of role teachers have at school at the example of a Polish school in Latvia, which is influenced by key competences acquired continuously in the process of learning throughout one's life. In order to confront theory with practice, empirical studies conducted in State Polish Grammar School in Rezekne which was part of the Erasmus+ program. The collected research data was based mostly on interviews. This article contains three research objectives, that is:

- **Exploration** (cognitive): determining whether and to what extent the competences of a teacher influence their role.
- **Description** (theory): Forming assumptions regarding roles that a teacher has.
- **Explanation** (practice): Emphasizing the multidimensionality of a teacher's roles in a peculiar environment where cultures overlap.

The aforementioned goals allow for establishing a broader perspective the role of a teacher, as well as the competences of teaching throughout their whole lives.

The theoretical issues of the topic are presented in the first part of the article. The following part contains the analysis of personal research.

The social and professional role of a teacher and their tasks and functions performed at school

The social and professional role of a teacher

The concept of a social role is connected with the position of an individual in a given society. The post indicates a person's position within the social, organisational or institutional sphere. D.J. Levinson notices that "*a role is an aspect of physiological organization because it entails function, adaptation and process*" (Szmatka, 1979: 31). Working in a specific organisation, e.g. a school, the role one plays in it is directly intertwined with the basics of its functionality. When we speak of a role, we really mean the function of an individual that they serve within an institution. It is also a process of adapting in a working position.

Social roles are the result of norms and directives that function within a society or a social group. Therefore, we can interpret them in different ways. First of all, as assigned warrants, that is to be able to adjust to a certain set of rules and general norms associated with a particular role. Second of all, as fulfilling the expectations of one's superiors, directors, but also society itself. A role fulfilled by a particular individual within an institution is a way of adjusting to an accepted norm. Certain pressures and rules are inhibitory or supportive to an individual.

According to R.Linton, a role "*entails attitudes, values and behaviours assigned to individuals and groups of specific social status by the society*" (Linton, 2000: 98). Each role performed by an individual is assigned to a particular template or scheme that the society is guided by when creating images, views or actions attributed to all members with social roles (Szmatka, 1979: 32).

Analysing different dimensions of fulfilling a role, it is imperative not to exclude the concept of a **role dilemma**, which assumes that each situation in a person's life can be linked to making decisions. Every decision is connected to suffering losses but also to personal gains. The source of a role dilemma may be the personality of an individual, which influences the forms of adaptation, but also the structure of the whole institution. Role dilemmas can thus be considered as all things unclear and ambiguous that stem from a certain role. As J. Szmatka says „each role entails norms, values, directives, etc. which are vaguely formulated, ambiguous, allow for different interpretations or even contradict other directives of a role” (Szmatka, 1979: 32).

Upon further analysis of the structure of fulfilling a role by an individual, it is important to notice the amenities of a role. **Role amenities** are "*identified technical, ecological and cultural factors which influence certain norms that are part of orders and requirements so that they are exceptionally noticeable*" (Szmatka 2007: 142).

An individual's ability to adapt to doing a certain job and fulfilling a certain role depends on their personality and it is the sign of satisfying one's needs.

The professional role of a teacher is then understood as one of the social roles. K. Konarzewski indicates that social roles cover groups of expectations according to which an individual should behave and think. A person fulfilling a certain social role also has specific demands or requirements in accordance to other people from their environment (Konarzewski, 2002: 151). Students, headmasters, parents and the rest of the staff will be **role partners** for teachers. Doing a teacher's job is mostly depending on the society's views or the social context. These indicators create norms and standards which direct a teacher's way.

Teachers are responsible for both the upbringing and education of their pupils. They are people with thorough knowledge not only regarding a particular subject, but anything that goes beyond that, that is originality, creativity and composition. It is a teacher's job to provide professional help and solve problems and difficulties they may encounter on their career path. While fulfilling different kinds of roles, teachers have to become guardians who through communication are capable of approaching their pupil, parent or other guardian on a very individual level. It is an important task to motivate and cultivate moral values that can tremendously influence personalities of pupils (Bloch-Nabiałek, 2005: 76).

We can distinguish three functions that a teacher should perform. The **didactic** role, which is strictly connected with teaching the canon of knowledge, as well as harnessing all sorts of skills. The educational role, whose purpose is to shape moral attitudes, indicate general norms and rules that govern a particular society, as well as to develop pro-social skills. The role of a **protector**, that is to satisfy the basic needs of a pupil, both biologically and psychologically. It is also to care about their sense of security and respect (Bloch-Nabiałek, 2005: 76).

For the purpose of the following article, we distinguish five roles related to the professional work of a teacher.

As a **guide and interpreter**, a teacher has to pave the way to understanding reality for their pupils. It is a person who help comprehend students environment, and through knowing what a society is aiming for and what it wants to maintain, they introduce generational transmission. It is important to notice that teachers introduce their disciples to the world of social culture. They reveal its past and future aims, as well as changes that transpire. They should explain the world to their pupils and show both the educational and everyday routes (Ferenz, 2009: 17).

As a **reflective practitioner**, it is a teacher's aim to reach deep thoughts that concern the objective (future), current action (present) and accomplished

tasks (evaluation of past results). When speaking of a reflective teacher, we mean their conscious practical action during which a critical analysis is applied, instead of spontaneous reactions described in behavioural psychology. As M.Czerepaniak puts it – *“it is a person’s attribute that allows them to understand a situation in which they act and depending on which they correct their own professional behaviour. It is a dynamic property which can be shaped and developed in the process of preparing for the job, reflected in deep reflection, as well as rational, critical judgement of individual elements and events that create an educational situation and their consequences regarding the development of people and social changes”* (Ferenz, 2009: 19).

As a **guardian-educator**, a teacher takes direct care of students in a particular grade (Kupisiewicz, 2009: 195). They transfer messages and knowledge, shape the basics, competence, but also skills that students will use for the rest of their lives. It is important to emphasize that teachers in an education system not only provide theoretical knowledge but also values that accompany us on every step (Olczyk, 2003: 119).

As a **transmitter and promoter** of values, a teacher focuses on being a link between feelings and culture, which provides a clear message through cooperation. It is not simple transmission of knowledge regarding cultural heritage, but also a process of preparation to achieve innovation which is increasingly common in our world. It is about teach about creativeness and about a new outlook on the world which helps pupils to better understand both the present and the upcoming changes in the social world.

As a **cultural animator of school life**, a teacher helps individuals or groups to work on self-improvement. Animating may also transpire along with specific tasks or during problem solving. A teacher animator works primarily using integration and social participation (Matyjewicz, 2010: 46). They introduce their pupils to social life through integration with the educational environment, that is the family, school and peers. M. Kopczyńska mentions that animation actively supports the youth in problem solving and the difficulties which they face. It also teaches to reflect upon decisions regarding one’s personal life through cooperation and self-control (Kopczyńska, 1996: 92).

Teacher competences and set of competences vital in the process of lifelong learning

Speaking of teachers, it is important not to omit the topic of competencies suitable for tasks they have to face. According to *Słownik Języka Polskiego PWN*, competencies can be defined in three ways. First, as a set of rights and capabilities thanks to which all individuals can deal with specific situations and make decisions. Second, this is knowledge, skills and experiences that an

individual acquires. Third, this is the ability to react to stimuli (Doroszewski, <http://sjp.pwn.pl/szukaj/kompetencje.html>).

However, if we view competencies as a disposition, it is useful to quote Z. Ratajk who considers them to be indicators of being able to fulfil a role properly (Ratajek, 2001: 25). In this context, competencies favour problem solving and support an individual when analysing new situations. Another noteworthy definition belongs to R. White, according to whom “*competencies are not only personal, motivational and consequently behavioural, but also social, because they give a certain character to our social surroundings*” (White 1995:18).

M.Czerepaniak-Walczak indicates, that competencies “*are special properties which are expressed while demonstrating on socially indicated standards the level of difficulty regarding adequate behaviour, the awareness of needs and consequences of that particular course of action as well as taking responsibility for it. It is a disposition achieved through constant studying, conscious to a person and capable of being observed and repeated by others. The structure of competence consists of two components: the ability to act accordingly and being aware of one’s needs and repercussions of one’s actions, as well as taking responsibility for the consequences*” (Czerepaniak-Walczak, 1995: 135-137).

To summarize, competencies can be called an interdisciplinary term. We can find them meaning either in economic sciences, management or administration as an element of the human capital, a collection of its resources, which is particularly important in the labour market. Pedagogically speaking, we distinguish them as a set of attributes which are the effect of studying, the basis for upbringing and help for adequate behaviour. Competencies are then a collection of acquired knowledge, skills, attitudes and properties of one’s personality (Whiddett & Hollyforde, 2003: 15).

T. Lewowicki points to a pattern of competencies which are common for every teacher. We can distinguish **personal competencies**, which indicate a teachers sensitivity, their openness, their desire to talk, how much self-criticism they apply, self-realization, taking another person’s right into consideration and being respectful and understanding. **Psychological** competencies, that is establishing a link between developmental psychology, diagnostics, negotiation, mediation, and also resistance to stressful situations. **Pedagogical and methodological** competencies, that is pedagogical knowledge and working methods, but also the correct way of reading the student’s behaviour, understanding, looking for the causes of specific actions, as well as evaluating performed tasks, the content of the curriculum and work methodology (Sikorski, 2003: 55-56).

A number of definitions describing competencies inclines to consider their multidimensionality. While performing an analysis, it is imperative to take into consideration the reality of each and every teacher.

Key competencies in the process of lifelong learning

Both the European Parliament and the Council of Europe have expressed the necessity for lifelong learning. According to the recommendation of 18th of December 2006 regarding competencies which are key in the process of lifelong learning, developing the offer of developing competencies is an extremely important strategy.

The following document determines up to **eight key competencies** and describes the most important knowledge, skills and attitudes associated with each of them. These key competencies **include being able to communicate in one's native language**, that is the ability to use one's native language in everyday communication, be it in speech or writing. It is the necessary vocabulary knowledge and a certain attitude towards one's nation. **The ability to speak foreign languages**, that is the ability to speak a different language than one's native one, as well as respect shown to different nationalities and knowledge that can be used in conversations. Both **mathematical and basic scientific expertise**, that is the ability to develop and use mathematical thinking in order to solve problems arising in everyday situations. This particular competence uses and goes back to knowledge and the basics which are incredibly helpful during tough situations. **Competencies regarding information technology**, that is skilled and critical usage of technologies of the information society. The ability to study, which is connected to the ability to learn things consequently and organise one's time in an efficient manner. **Social and civil** competencies, which includes all of the personal, interpersonal and intercultural. **Initiative and entrepreneurship**, that is the ability to implement one's ideas. That includes creativity, innovation, but also the ability to take risks. The last of the competencies is cultural awareness and expression, which entails appreciation towards creative expression of ideas (Sikorski, 2003: 55-56).

Analysis of the research data

The area of empirical research, performed in a practical way in the following article, includes the role of a teacher and all the competencies necessary during the process of lifelong learning. The aforementioned issues were used during analysis of the collected research material. This analysis is to determine how effectively the key competencies acquired during the process of

lifelong learning affect the way of performing the role of a teacher. The research is based on materials gathered during a two-month university internship in State Polish Grammar School in Rezekne in Latvia, as part of Erasmus+.

The following paper applies the model of **qualitative research**. Choice in this article is connected with the fact that *“in qualitative research (...) it is possible to tackle subjects that go beyond that which is objective and measurable, which allows to research issues associated with judgement, values and experiences, that is all that is standalone”* (Sikorski, 2003: 276). In order to answer the question what sort of role a teacher has in a Polish school in Latvia and what sort of influence it has on competence, it is essential to study the teacher, their working conditions, experience and reasons for pursuing that particular career. Qualitative research allowed me to look at certain cases of teachers working in a State Polish Grammar School in Rezekne. To analyse the gathered materials, used seven teachers narratives.

The conducted analysis of the study showed that competencies of each teacher influence the role they perform at school. You can distinguish a few roles: guardian, interpreter, reflective practitioner, educator, transmitter and promoter of values and cultural animator of school life. The assigned role depends on competencies that each teacher possesses, that allow them to perform a certain role according to social expectations. Through development of competencies, learning and gaining experiences, a teacher is increasingly better at their job, but also begins to perform other roles more efficiently, which stems from new circumstances.

The most important competences that can be detected from the collected research data is the ability to speak a foreign language. It is imperative for allows efficient functionality within every role in a multicultural environment.

The ability to learn allows a teacher extend their knowledge, acquire new skills, have them reflect upon certain things which may remain a long-lasting tendency. Studying helps in the process of self-evaluation, which favours the role of a reflective practitioner.

A guardian and interpreter depends on knowledge and experience. The teachers are open and friendly. The teachers are a companion, they show the way but do not impose it. They are a person who explains the world around them, for which they use competencies associated with knowledge, social and personal competencies, but also the ability to intrigue others.

The aforementioned research material does not only indicate the diversity of competencies that belong to the teachers of the State Polish Grammar School in Rezekne, but more importantly, it indicates the variety of roles performed by the teachers. A lot of them emphasize how important it is to explain reality, show the tendencies of social ways through transmission, aim to describe the world around us, which is especially emphasized by teachers consign from

Poland to work in Latvia. The analysis indicates that teachers perform a very important role of a guide and interpreter. They become a companion on the way to gain knowledge and they participate in the process themselves.

Teachers also communicate certain values, extend the students' knowledge by speaking about Polish and Latvian culture, care for their pupils every day, for that is what is expected of them by parents. They care about safety which eventually turns them into guardian-educators.

The role of a cultural animator of school life is not to be omitted as well. A teacher, thanks to their entrepreneurship, initiative and ideas, becomes an animator. Teacher animate and encourages students to work, activates and cooperates with the rest of the staff which favours the creation of partnership between teachers, administration, management, but also parents.

It can be observed that competencies influence all the performed roles. While interpreting the aforementioned issues, it is essential to remember to take the social context into account, as well as the specifics of the environment.

Conclusion

This paper showed the influence of competencies of a teacher on the role performed in the State Polish Grammar School in Rezekne. The subject of this study was the social role assigned to teachers in the aforementioned school.

The paper had three aims. **Exploration**, which was to determine if and how strongly the competencies of each teacher influence their roles. This aim was achieved due to the gathered material, which, upon further analysis, proved that having adequate competencies in a specific role is of utmost importance. In a situation where a teacher does not possess the appropriate competencies, they still fulfil the assigned role because it is associated with the expectations imposed on them. Therefore, one can theorize that a certain range of competencies in a specific role allows for adequate performance, while the lack of those competencies results in being unable to meet the expectations associated with that role.

Description, that is formulating assumptions regarding a teacher's performance, was reflected in the analysis of the conducted research, which is based on the basic theoretical claims regarding a teacher's role. Those claims are linked to the fact that each educator present in the school represents the role of a guardian, interpreter, reflective practitioner, educator, transmitter and promoter of values and cultural animator of school life. To be able to fulfil them properly is however connected with the competencies of a teacher.

Explanation, that is drawing attention the multidimensionality of performed roles in a peculiar environment where culture overlap. It is especially

connected with working experience, social pressure regarding certain teachers and their competencies. Research data proves that the same roles performed by different teachers, differ from one another.

Analysing the research data proves how important it is for performing a social function to develop one's competencies, which influence a certain role in a direct way. Teachers numerously show that thanks to teaching using practical work, using experience and even through a conversation with another educator, the pupils' future behaviour is formed.

Competencies of each teacher are not creators of social roles performed by educators. The more they are developed, the greater influence they have over feeling comfortable in a role, which can be particularly noticed in people with greater working experience.

On a number of occasions, teacher look back to their own experiences, thanks to which they changed their behaviour using reflective thinking. This kind of behaviour also proves that competencies are developed through practice and reflection.

The paper is going to prove an inspiration and help to those interested in the topic of roles and competencies of a teacher in an environment where cultures overlap. This study of the subject presents the issue in the most understandable, factual and objective way, but also shows conclusions which may inspire further pedagogical actions.

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Sylwia Szulc. *The Role of the Teacher and Eight Key Competence for Lifelong Learning. Case Study Polish School in Rezekne*

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LIFELONG EDUCATION AS A KEY FACTOR OF THE TRANSFORMATION AND DEVELOPMENT OF THE HUMAN CAPITAL'S POTENTIAL

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Abstract. *The Actuality of the proposed research is caused by the facts that the rapid development of market relations in the Latvian economy and a high level of life in the “old countries” of the European Union affect the outlook of the majority of young people in Latvia. There is a tendency to reduce the motivation for obtaining fundamental education by giving preference to acquisition of certain professional skills allowed to get ‘quick money’’. The Object of the research is the transformation process of students’ beliefs, values, competences, experience during their lifelong learning. The Aim of the research is to analyze the influence of lifelong education on the transformation of students’ beliefs, values, competences and experience. The Methods of the research are the following: 1. theoretical methods: the theoretical analysis of the scientific literature on the given problem; 2. quantitative methods: questionnaires; 3. The empirical analysis of the survey’s answers given by students of Latvian higher and vocational schools about the transformation of their beliefs, values, competences, experience during the process of lifelong learning. The Baltic International Academy (Riga, Latvia), The Latvian Agricultural University and the Jelgava College (Jelgava, Latvia) were used as the experimental Base of the research.*

Keywords: *adult, beliefs, capital, competence, development, experience, lifelong education meaning, purposes, perspectives, potential, schemes, student, transformation, values.*

Introduction

*“Humans should understand the meaning of their experience,
learn to make their own interpretations rather than act on purposes,
beliefs, judgements and feelings of others.
Facilitating such understanding is the cardinal goal of adult education”
Jack Mezirow (1997)*

It is extremely important to understand the indivisible unity of a physical, spiritual and intellectual components of the notion “human potential” which is the base of the economic growth, prosperity and health of any nation nowadays. The significance of intellectual, spiritual and cultural constituents of individual’s potential contribution is increased and changed as it forms and develops social

capital of any state dependent directly on individual's abilities to perceive, process and implement obtained new knowledge, skills and competences in order to adapt to changes and develop her/his own potential more. Human resources are the most important components of any state's potential. Considerable attention in contemporary scientific literature is paid to the analysis of the concept "human capital" in opposition to and sometimes identification with the notion "human potential". Human potential represents the developed innate abilities of human beings influenced the results of activities in which they are involved (Adler & Kwon, 2012). The essence of the notion "human capital" is determined as a set of human professional knowledge, skills and competences that can generate revenue. Education, vocational training and health care are considered to be the main types of investment in human beings (Bourdieu, 2006; Coleman, 2010).

The Indian scientist Sen (1999) in his famous "capability approach" believes that the process of human potential development is not only the process of physical and economic well-being but mainly it implies greater freedom of choice, each individual could choose the certain purpose and way of life which he/she considers preferable from a large number of options. Income is only one choice desirable for a man but it does not determine all the opportunities and diversity of human life. The economic growth, according to Sen (1999), can contribute to human development when it provides an adequate level of public expenditure which are invested in the social environment in the equitable distribution of economic resources, and the government provides equal opportunities in spheres of education, health care, security, political and civil rights.

The population of the Latvian state is decreased because of the population growth's negative indices (they were equal to - 425 in the 2014) and migration (more than 250000 people left Latvia during last years) (Melihovs, 2015). The Latvian population is aging. The proportion of seniors increases; it was equal to 18 % in 1990, 28 % in the 2013 and, according to forecasts, it is going to be equal to 36 % in the 2030 (Melihovs, 2015).

But it is possible to increase human potential as a factor of the economic growth by raising the level of education and vocational training of population. The government should increase financial flows directed to lifelong education. Expenditures on education are considered as the investment in human capital, modern educational technologies. This investment should be paid off no later than obsolescence of knowledge (Болтнева & Филаткин, 2014). The rapid development of market relations in Latvian economy and a higher level of life in the "old countries" of the European Union influence the outlook of the majority of young people. There is a tendency of a decline in motivation for obtaining fundamental education, that is why the problem of searching for additional

internal sources of economic growth exists. One of such sources is the system of lifelong education. Lifelong learning, Mezirow (1978) calls it transformative learning, involves changes of learners' behaviour, understanding their own experience and the surrounding world, perceptions, and values. Mezirow (1997) in his Theory of Transformative Learning claims that the most significant adult learning makes an individual to be aware of the ways in which unquestioned assumptions acted as taken-for-granted beliefs. This type of learning constrains and sometimes distorts the ways by which people make their sense of the world. These assumptions have two dimensions:

1. habits of expectations (so called 'meaning perspectives'), which could be considered as "filters" for shaping people's meaning making; and
2. individual's beliefs, values, judgements, attitudes, points of view (so called 'meaning schemes') Mezirow (1997).

The survey's results of higher and professional schools' students of Latvia about the transformation of their beliefs, values, potential, understanding and implementing their learning experience are analyzed in the proposed research.

Latvia should increase human potential as the essential factor of the economic growth. The level of knowledge and professional training of each individual forms the quality and the level of human potential. In accordance with statistics, human potential development index in Latvia is included in the group determined as "very high", and takes the 46th place in the ranking of countries (Melihovs, 2015). Nevertheless Latvia lags behind other Baltic states, for example, Estonia takes the 30th place, Lithuania takes the 36th place. Investments in education have an impact on the individual's social status and his/her Self-esteem increase, as well as the reproduction of spiritual and intellectual potential of society, which demands new approaches to learning and teaching. Lecturers and students meet problems, challenges and uncertainties in the domestic and external environment. Let's analyze the concept of Transformative Learning by Jack Mezirow (1978, 1991) where he defines the essence of learning as the process of not only assimilation of knowledge and skills but also as the process transformed the word view, values, beliefs, competences of learners.

The Essence of Transformative Learning Theory (Mezirow, 1978)

The Theory of Transformative Learning by Jack Mezirow (1978) deepens our understanding what it means to learn. It is a complicated description how learners interpret, justify, and restart the value of their experience. The transformation of meaningful schemes occur through their learning. Scientists Taylor (1998), Scott (1997) and Cranton (2004) support the opinion of Mezirow (1991) that such a transformation occurs through several stages started with the

reorientation of dilemma. These stages include: 1.the Self-analysis; 2. the critical evaluation of an assumption; 3. the recognition that a similar transformation occurs with other people; 4. the investigation of new actions or roles; 5. the action plan elaboration; 6. the knowledge and skills assimilation for this plan implementation; 7. The verification of the plan; 8. the development of competence; 9. faith in Self in new roles; 10. new integration into life on the base of a new perspective.

Mezirow (1978) in his Theory of Transformative Learning considers that the process of perspective transformation has three dimensions: 1.psychological (changes in understanding of Self); 2. Convictional (the revision of the belief system); 3. Behavioural (changes in lifestyles). The authors of the proposed research share the opinion of Mezirow (1991) who believes that Transformative Learning is the expansion of consciousness through the transformation of basic world view and specific capacities of Self. Learners engaged in critical reflection on their own experiences, change their meaning schemes - specific beliefs, attitudes and emotional reactions, thus, changing their perspectives.

Roberts & Burge (2008) define 5 characteristics of learners existed in any learning environment: 1. a motivational call to action; 2. developmental stages (thinking and group processes); 3. gender differences; 4. differences in culture; 5. learning styles. Motivation influences the amount of time which students are ready to devote to their learning, develop their competences and solve problems. Students' persistence in overcoming difficulties depends greatly on how much time students focus on learning. Students who focus on learning, are opened to new challenges (Dweck, 2012). Social possibilities also influence on motivation. Learners of all ages are motivated more when they see the usefulness of what they learn and they know how to use obtained knowledge, skills, competences in order to do something which can influence other people (Pintrich & Schunk, 1996; McCombs, 1996). The important condition of human existence is the necessity to learn how to make their interpretations of own experience. The authors support the point of view of Mezirow (1997) that facilitating such understandings is the cardinal goal of adult education.

The key idea of Mezirow (1978, 1991, 1997) is that learning occurs as soon as there is a paradigm shift, some changes of prospects or when an adult rebuilds own values, beliefs and the world views. The main focus should be on the learner's experience and ways by which he/she analyzes it. Mezirow (1978) determines several ways to promote individuals' critical thinking and awareness. It is very important how a person interprets his/her experience, what meaning is attached to it, how it could be changed in order to get new understanding of what happened and what could be learnt from that for future activities. People should learn to change their schemes – values, specific beliefs, attitudes, and emotional reactions - that in turn leads to the transformation of perspectives. The

authors support the point of view of Mezirow (1991) that the transformation of perspectives is the process of understanding how and why people's assumptions limit the way of their perception, understanding and feeling of the world, the process of changing structures of habitual expectations. People should comprehend that in order to create a possible perspective more perfect, and finally make a choice based on new understanding. The transformation of perspectives explain how meaningful structures which have been mastered over a lifetime become transformed. This type of learning has its roots in the process of creating a sense which is a base of constructivism, where the environment should provide support, promote a dialogue, critical understanding of the studied material and Self (Piaget, 1967).

The problem of Transformative Learning is urgent in Latvia nowadays because the analysis of the current situation of our state shows that each individual should be aware of the need to obtain new knowledge and skills, to be in the centre of contemporary lifelong educational process in order to survive and achieve a higher level of life and its quality. Thus, lifelong learning, knowledge and skills' transfer are very important because "transformative learning promotes autonomous thinking" (Mezirow, 1997). Thus, he supports the idea of Carl Jung (1921) who is the first scientist discovered that transformative learning allows a learner to form his/her personality, differ from others, develop own personality, to be an individuality.

Conditions for Successful Transformative Learning

Learners should share the responsibility with their lecturers for creating conditions for successful Transformative Learning. The main result of Transformative Learning is the further development of students' competences, abilities to focus on a new idea, position, or achieve a shift in a new paradigm, thus taking a new view on the same idea. Singley & Anderson (1989) consider that specific facts and skills should coincide in the initial and subsequent learning, and the degree of knowledge transfer successfulness depends on the level of initial learning, it should be adequate. Students should control continuously his/her progress in own learning and implement an effective feedback with their lecturers that is one of the most important preconditions for successful learning (Torndike, 1932).

The Empirical Analysis of the Survey's Results Conducted at Vocational and Higher Schools of Latvia

The authors of the proposed research conducted a survey of students of The Jelgava College, The Latvian Agricultural University and The Baltic

International Academy who were given questionnaires during September-December 2015.

Students were asked to answer such a question, if learning transforms their beliefs, values, attitudes, understanding their experience and perspectives as the American scientist Jack Mezirow (1978, 1991, 1997) believes in his Theory of Transformative Learning. Respondents had to circle the most appropriate answer among “No” / ”It is difficult to answer” / “Yes”, and give a short example confirmed their opinion.

210 respondents took part in this survey, they were 111 female students and 99 male students aged between 17-33 years.

The results of this survey were the following:

177 students – (it is equal to 84 % of all respondents) - gave the positive answer “Yes”; “22” respondents (it is equal to 11 % of all respondents) gave the negative answer “No”; and 11 respondents (it is equal to 5 % of all respondents) circled the answer “It is difficult to answer”.

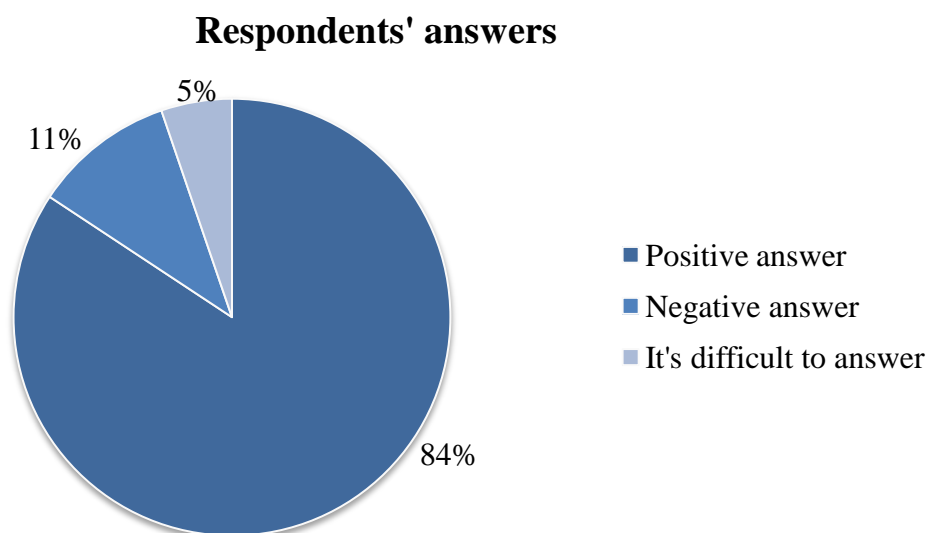


Figure 1 The results of the survey

Students who answered “Yes” wrote: ” ... learning makes a person wiser, it broadens the mind, expands an outlook, he/she looks at many things and problems differently than before...”, “... I wanted to buy a car, but after watching a film about the Greenhouse effect and the depletion of the ozone layer at the lecture, I thought if I really needed a car with a powerful engine”, “ ... the more you know, for example, about how your parents raised and brought you up, the more you start to think about many things differently, your beliefs are changed...”, “ ... new information obtained during learning changes our beliefs and values significantly...”, “ ... learning broadens our horizon, allows critically reflect on experience, it changes many beliefs and values...”, “ ... learning is the

greatest value of an individual which allows him/her to change him/herself, own values and beliefs...”, “ ... a person can assess his/her values, ways of thinking and beliefs only by studying, comparing and being aware of different processes...”, “ ... when we collide with other values in the process of education, understand what happens around us, our understanding about our values and actions changes...”, “ ... people become cleverer and their values, beliefs are changed”, “ ... I learn at the veterinary faculty, I started to look at my values, beliefs and animals quite differently than before by studying the anatomy of animals. It changed my way of thinking and perception of life...”, “ ... when a person learns he/she discovers a lot of new and that may change his/her values to 180 degrees...”, “ ... my values changed very much after studying at school and university...”, “ ... all your values are changed greatly after studying because your experience, susceptibility, the level of development and understanding are also changed, the causal relationships and analytical abilities are formed...”, “ ... learning gives us wider possibilities to implement new knowledge and it changes our personality, beliefs and values...”, “ ... you are clever and you want to be cleverer, that gives you the opportunity to find a well-paid and interesting job and implement a higher level of life...”, “ ... values are changed with the development of personality, the study of logic, knowledge of the world and with age, because a person becomes wiser and his/her perception of life is also changed...”, “ ... while learning you become able to make more reasonable decisions and change own values...”, “ ... learning and reading change values and horizon of a person greatly, help to achieve a lot in life...”, “ ... a person changes his/her world view and values by learning very much. For example, 50 years ago our history text-books gave people completely different information than now...”, “ ... education determines higher standards in life, confidence in Self and future...”, “ ... I conducted the research about a scientist Stephen Hawking, read some his books about the universe, that influenced on my values and outlook on life greatly...”, “ ... new knowledge change our outlook on many things, our values change also with age. For example, when I was 20, I liked to go to the disco but I enjoy visiting the opera”.

Respondents answered “No” motivated their choice by the following phrases:” values and beliefs are laid by parents, family, friends in childhood and it is difficult to change them”. Respondents who circled “It is difficult to answer” wrote that the change of values and beliefs depended on many reasons - experience, a future profession, a family, a person, a lifestyle...

Conclusion

The development of market relations in the post-Soviet space leaves its mark on the formation of world outlook, reassess spiritual and social values. It

seems that on one hand young people lost interest in fundamental education by giving preference to acquisition of certain professional skills allowed to get “quick money”. On the other hand there is dissatisfaction with the learning and teaching processes based on the combination of accessibility to many information sources with simply cumulative methods of obtaining knowledge and skills which rapidly become obsolete under modern conditions of the development of science and industry. Latvia faces a complicated demographic situation and way out of that is the development of human capital potential improvement as the key factor of the economic growth. The Indicator of the Human Development Index in Latvia is the lowest in the Baltic States that could be explained by inadequate funding of education and science.

It is necessary to increase the interest of students to lifelong learning as it is the constant process of knowledge, skills, competences updating throughout life, to create new educational technologies, combine theoretical knowledge obtained at professional and higher schools with practice. The Latvian Ministry of Education and Science should plan the enrollment of students for certain specialties more adequately in line with demand of the Labour Market. The government of Latvia should invest much more money for the establishment and development of industrial and scientific enterprises, working places where our young people could implement their obtained knowledge, skills, competences, get interesting and well-paid job and achieve a high level of life.

“Obtaining qualitative education is the key condition for success in future life, it is the main value of personality, learning really transforms values and beliefs of individuals in the positive direction, promote the development of critical and analytical thinking, personal enrichment and the achievement of higher standards and quality of life”-such approvals express the main ideas of the majority of respondents’ answers received in our survey.

The authors of the research conclude that contrary to the claims that the prestige of professional and higher education falls the majority of students associate obtaining good education with the essential development of personality and the improvement of life quality.

The results of the conducted survey confirm that lifelong education is a key factor of the transformation and development of human capital’s potential.

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ВЗАИМОСВЯЗЬ МАТЕМАТИЧЕСКИХ СПОСОБНОСТЕЙ И ВЫБОРА ТРУДОВОЙ КАРЬЕРЫ

Interaction of Mathematical Abilities and the Choice of a Vocational Career

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Abstract. *The article analyzes vocational education teachers' approach to the interaction between mathematical competence and working-class career choice in the educational process of the students with mathematics learning difficulties. There are distinguished basic mathematical subjects and mathematical skills, which, according to the teachers, are important and necessary for successful vocational training (learning).*

Keywords: *mathematical skills, working-class career, difficulties in learning mathematics, vocational training, literacy, interaction, education system, educational content.*

Введение

Introduction

Важное место в профессиональной подготовке молодых людей занимают общие способности, и при обучении выбранной специальности умение знания по математике и другим предметам применить на практике. Все это требует изменений в содержании и процессе обучения математической грамоте в школе таким образом, чтобы это стало ценным и важным в дальнейшем образовании, профессиональной деятельности и самовыражении молодого человека (особенно учащихся со специальными образовательными потребностями). Таким образом, при выявлении взаимосвязи математических навыков и выбора трудовой карьеры становится актуальным сотрудничество между педагогами общеобразовательных школ и профессиональных учебных заведений, так как именно педагоги профессиональных учебных заведений могут оценить умение на практике применить математические знания молодых людей со слабо развитыми в общеобразовательных школах навыками и предоставить возвратную информацию о развитых навыках математической грамотности, рациональные предложения учителям

математики, работающим в общеобразовательных школах, по совершенствованию процесса обучения математике.

С этой целью был проведен опрос педагогов профессионально-технических училищ и профессиональных учебных заведений Литвы, в котором приняли участие 124 педагога–предметника и педагоги, готовящие к профессии, которые обучают молодых людей со специальными образовательными потребностями или имеющих затруднения в изучении математики (**выборка исследования**).

Цель исследования – выявить отношение педагогов профессиональных учебных заведений Литвы к взаимосвязи математических навыков и выбора трудовой карьеры учащихся со специальными образовательными потребностями или имеющих затруднения в изучении математики.

Объект исследования – взаимосвязь математических навыков и выбора трудовой карьеры учащихся со специальными образовательными потребностями или имеющих затруднения в изучении математики.

Методы исследования – анкетный опрос, качественный анализ данных. Обработка данных проводилась с помощью программного оборудования обработки статистических данных „SPSS (Statistical Package for Social Sciences) for Windows 19.0“. Для анализа количественного исследования применялась описательная статистика, многомерные статистические методы: факторный анализ (метод главных компонент, проведен расчет коэффициента Cronbach α , ротация VARIMAX с нормированием Kaiser, применяя факторный вес L), непараметрический критерий Фридмана для определения среднего рейтинга математических навыков.

Основным методом исследования был выбран анонимный письменный анкетный опрос. Вопросник состоит из демографического блока (данные об исследуемых); 2 блоков вопросов для оценки уровня математической грамотности и преобладающих математических навыков молодых людей, обучающихся в профессиональных учебных заведениях. Положения в анкетных блоках представлены в формате ответа номинальных шкал и шкалы Лайкерта, а также шкалы семантического дифференциала, когда достаточно выбрать один из предлагаемых ответов или несколько ответов, чтобы выяснить личное мнение педагогов. В исследовании придерживались принципов конфиденциальности и анонимности данных, гарантируя, что данные исследования будут использованы только для исследовательских целей.

Теоретические аспекты исследования *Theoretical aspects of the research*

В научной литературе (Aspelund, 2012; Baranauskienė, Juodraitis, 2008; Baranauskienė, Tomėnienė, 2010, 2012; Grazioli, Baranauskienė, Radzevičienė, 2012; Pukelis, Garnienė, 2003; Spichtinger, 2012 и др.) подчеркивается, что данные общие способности у человека необходимо формировать наряду с обучением карьерному росту, профессиональным информированием, консультированием и ориентированием уже в допрофессиональный период, обучаясь в общеобразовательной школе, поскольку обучение и профессиональная подготовка высокого качества, начиная с дошкольного периода и заканчивая подготовкой к профессии, является лучшим способом достигнуть, чтобы человек (особенно тот, который с трудом усваивает содержание образования или является лицом со специальными потребностями) эффективно интегрировался в рынок экономики и занятости и стал бы активным членом общества (Baranauskienė, Geležinienė, Tomėnienė, Vasiliauskienė, Valaikienė, 2010). Необходимой становится проекция на будущее учащихся, испытывающих трудности в обучении, – что будет, когда ученик закончит школу? Обеспечивает ли существующее содержание образования дальнейшее активное участие личности в профессиональной деятельности, в общественной жизни? В этом случае учебные заведения играют важную роль – в помощи учащимся, испытывающим трудности в обучении; в согласовании своих целей с возможностями при выборе соответствующей рабочей профессии; в развитии общих способностей, чтобы приспособить их к постоянно меняющимся потребностям общества (Baranauskienė, Valaikienė, 2010, Luneckienė, Jurkuvienė, Stankuvienė, Palačionienė, 2011; Mažylienė, 2011).

Результаты исследования *Results of the research*

Анализ ответов на вопросы демографического блока показал, что были опрошены 75,8 % женщин и 24,2 % мужчин. Возраст учителей разнообразен: большинство принявших участие в опросе респондентов были педагоги профессиональных учебных заведений – учителя по профессии от 41 до 60 лет. Они составили 68,5 % всех респондентов. Большая часть опрошенных (N=110; 90 %) с высшим образованием, 6 % - с базовым высшим образованием, 4 % не ответили на данный вопрос. У более двух третей респондентов (N=114) – педагогическое образование, у 10 исследуемых – техническое образование. Среди 114 респондентов с педагогическим образованием у 27,4 % квалификационная категория

учителя, у 49,2 % - старшего учителя, у 18,5 % - учителя–методиста и 1,6 % – эксперта. Более половины опрошенных (56,2 %) учителей в профессиональных учебных заведениях преподают теорию специальности и ведут практическое обучение по специальности; 29,8 % учителей – теорию специальности или практическое обучение по специальности; 13,7 % – преподают общекультурные предметы. Средний стаж педагогической работы учителей, принявших участие в опросе, – 18 лет, общий рабочий стаж – 22 года. Это позволяет сделать предпосылку, что большинство участников исследования имеют большой опыт работы с учащимися, следовательно, их ответы важны и ценны.

Ответы на вопросы второго блока предназначены для оценки выражения навыков математической грамотности учащихся профессиональных учебных заведений и с затруднениями в изучении математики, в применении математических знаний в практической и профессиональной деятельности. Анализ результатов исследования показал, что уровень математической грамотности учащихся, приходящих учиться в профессиональные учебные заведения, не является достаточным ($M=2,00$). Они редко способны применять знания по математике при изучении профессии ($M=2,26$) и в жизненных ситуациях ($M=2,43$). По мнению респондентов, учащимся с трудом удается применять математические знания, приобретенные в школе, в профессиональной деятельности. Результаты стандартных отклонений (SD) показывают, что респонденты достаточно одинаково оценили данный вопрос. Исследуемые считают, что изучение математики неотъемлемо от способности учащегося связать новую информацию с уже имеющимся опытом обучения. Педагоги единодушно согласились с мнением, что осмысленные, связанные с реальной жизнью знания позволяют учащемуся воспользоваться ими в новых ситуациях, в профессиональной деятельности. По их мнению, среди основных математических навыков и развитием трудовой карьеры существует значимое взаимодействие.

Ответы на вопросы третьего блока предназначены для оценки преобладающих математических навыков молодых людей, обучающихся в профессиональных учебных заведениях. Установлено, что у учащихся со специальными образовательными потребностями или имеющих затруднения в изучении математики недостаточно развиты общие математические навыки, т.е. математические знания и понимание, способность к изучению математики и интерес к ней, решение проблем, математическое общение, математическое мышление. В общих учебных программах начального и базового образования (2008) утверждается, что одним из наиболее важных навыков, которые должен приобрести каждый учащийся, является математическое мышление и способность учиться,

однако на практике оказалось, что эти навыки менее всего развиты. Результаты стандартного отклонения (SD) показывают, что мнение по этому вопросу принявших участие в исследовании респондентов аналогично.

У учителей попросили выделенные методом теоретического анализа основные навыки поделить на признаки соответствующей когнитивной группы, на характерные процедуры и оценить преобладающие среди данных учащихся области когнитивных математических навыков. На основании полученных результатов с целью выявления выражения (структуры) навыков математической грамотности прежде всего необходимо проверять пригодность существенных положений навыков для факторного анализа, взаимосвязь между переменными. Установлено, что данные пригодны для факторного анализа (теста Bartlett' $p=0,000$; КМО=0,887, Cronbach $\alpha - 0,91$). После факторного анализа достоверности положений опросника выделены статистически пригодные и надежные факторы, а также составляющие их характеристики – эмпирические индикаторы, которые исследователи назвали как области «математических знаний и понимания» когнитивных навыков, «математическое общение», «применение математики», которые можно поделить на процедуры и основные навыки (таблица 1).

Таблица 1. Структура основных математических навыков
 Table 1 The structure of the main mathematical abilities

Области когнитивных навыков	Процедуры и основные навыки	Факторная нагрузка: факторный вес L	Предел колебания значений коэффициента корреляции, r/itt	Коэффициент альфа Кронбаха	Описательный разброс фактора, %
Математические знания и понимание КМО (0,887)	Навыки по измерению	0,802	0,788	0,922	18,28
	Умение изобразить, начертить	0,793	0,784		
	Умение воспроизвести, вспомнить	0,761	0,792		
	Нахождение, решение	0,684	0,783		
	Умение выбрать	0,663	0,758		
	Умение присвоить	0,650	0,742		
	Умение группировать	0,545	0,556		
	Вычисления	0,539	0,676		
	Навыки установить связи, соотношения	0,494	0,609		

Математическое общение КМО (0,887)	Процедура воспоминания	0,751	0,800	0,919	18,13
	Процедура воспроизведения	0,676	0,676		
	Процедура понимания	0,668	0,784		
	Процедура ответа	0,650	0,661		
	Процедура объяснения	0,642	0,650		
	Процедура использования математического языка	0,621	0,735		
Применение математики (решение рутинных задач) КМО (0,887)	Навык воспользоваться календарями	0,833	0,871	0,926	13,44
	Навык воспользоваться калькулятором	0,828	0,847		
	Навык воспользоваться информационными таблицами, графиками	0,768	0,824		
	Способности использовать простейшие экономические знания	0,704	0,803		
	Навык воспользоваться формулами	0,587	0,701		
Применение математики (решение проблем) КМО (0,887)	Изображение, представление	0,757	0,813	0,843	10,17
	Выбор	0,749	0,765		
	Моделирование, применение модели	0,671	0,691		
	Выполнение	0,602	0,556		
	Реализация, воплощение	0,575	0,488		

Факторным анализом были выделены следующие компоненты группы математических навыков: математические знания и понимание (Cronbach α – 0,922, описательный разброс фактора – 18,28 %), математическое общение (Cronbach α – 0,919, описательный разброс фактора – 18,13 %), а также применение математики (Cronbach α – 0,926, описательный разброс фактора – 13,44 %), где математическое применение разделяется на две группы: на решение проблем (Cronbach α – 0,843, описательный разброс фактора – 10,17 %) и решение рутинных задач (Cronbach α – 0,926, описательный разброс фактора – 13,44 %).

Коэффициент альфа Кронбаха (Cronbach alpha) оценивает внутреннюю согласованность шкалы опросника ($0,843 < \text{Cronbach's Alpha} < 0,926$ – достоверность хорошая). Таким образом оказалось, что все

факторы являются достаточно однородными. Описательный разброс фактора указывает, какую процентную часть целого объясняет исследуемый объект. Описательный разброс факторов колеблется от 18,28 % до 10,17 %, поскольку для определения выражения навыков математической грамотности использовались 48 положений (основные математические навыки). Следует отметить, что получены хорошие и умеренные корреляции эмпирических оценок индикаторов с извлеченными факторами. Об этом свидетельствует предел колебания значений коэффициента корреляции ($0,488 < r < 0,871$). Коэффициент Кайзер–Мейер–Олкин (КМО) оценивает пригодность матрицы для факторного анализа. Чем ближе значение коэффициента к единице, тем больше матрица пригодна для факторного анализа. В этом случае КМО высок (0,887), так что матрица очень подходящая для факторного анализа. Созданная нами модель факторов подходит для использования, так как сохранилось 60,81 % данных начальной дисперсии. По утверждению Филда (2005), созданная модель факторов подходит для использования тогда, когда остается не менее 50 % дисперсии начальных переменных (Skaržauskienė, 2008). На основании факторного анализа данных математическую грамотность определяют следующие когнитивные области: математические знания и понимание (преобладающие навыки по измерению, $L=0,802$), математическое общение (преобладающая процедура воспоминания, $L=0,751$), применение математики (решение рутинных задач) (преобладающий навык воспользоваться календарями, $L=0,833$), применение математики (решение проблем) (изображение, представление преобладающей процедуры, $L=0,757$).

Учитывая то, что оценка выражения навыков математической грамотности учащихся с затруднениями в усвоении математики осуществлялась на основе теоретически охарактеризованного конструкта, полученные показатели могут быть определены как высокие. Следовательно, представленные показатели шкалы удовлетворяют методологическую норму надежности и факторной пригодности (англ. factor validity) конструкта.

Обобщенные данные о средних показателях (M) и стандартных отклонениях (SD) когнитивных навыков, характеризующих математическую грамотность учащихся со специальными образовательными потребностями или имеющих затруднения в изучении математики, представлены в таблице 2.

Таблица 2. Данные о средних показателях и стандартных отклонениях когнитивных навыков

Table 2 The means of the scores of cognitive abilities (M) and standard deviations (SD)

Области когнитивных навыков	Средний показатель (M)	Стандартное отклонение (SD)
Применение математики (решение проблем)	1,19	0,32
Математическое общение	1,34	0,38
Математические знания и понимание	1,58	0,51
Применение математики (решение рутинных задач)	1,67	0,43

Обобщенные данные о средних показателях и стандартных отклонениях когнитивных навыков, характеризующих математическую грамотность учащихся с затруднениями в учебе, показали, что самые высокие оценки приходятся на навыки когнитивной области «Применения математики» при использовании календарей, калькуляторов, таблиц, графиков, вспомогательных средств ($M=1,67$; $SD=0,43$), на навыки измерения когнитивной области «Математические знания и понимание» ($M=1,58$; $SD=0,51$). Самые низкие показатели приходятся на навыки решения проблем ($M=1,19$; $SD=0,32$). Стандартным отклонением (в интервале 0,32-0,51) в основном выделились оценки навыков измерения (0,51).

Для того, чтобы определить, какие основные математические навыки, по мнению учителей, более или менее значимы при обучении выбранной рабочей профессии, был применен непараметрический критерий Фридмана. Проанализировав полученные результаты, отмечено, что статистически значимо ($\chi^2=1015,504$; $df=46$; $p=0,000$) отличалась интенсивность взаимодействия основных математических навыков с профессиональной подготовкой (так как $p < 0,05$). Это позволило сравнить средние величины влияния основных математических навыков, по мнению педагогов, на выбор профессии и учебу. Сравнив средние величины основных математических навыков, отмечено, что более всего (средняя величина $M=40,83$), как считают учителя, для успешного приобретения профессии необходимыми навыками являются математически моделированные ежедневные ситуации и решение проблем с применением простейших стратегий; понимание математических аспектов повседневного языка; ответы на несложные практические и математические вопросы с использованием математического языка; связь чисел и элементарных арифметических действий с конкретными объектами и ситуациями ближайшей среды; использование

информационных таблиц, графиков, калькуляторов; анализ самых простых жизненных ситуаций; формулировка их в математических терминах; составление плана и вычисление числовых значений простейших явлений; выполнение несложных прямых и косвенных измерений; решение математических заданий жизненного/специфического (характерного для специальности) содержания; понимание недостающей информации для выполнения несложных заданий и др. Педагоги единодушно согласились с утверждением, что понимание известных математических понятий, математических моделей при анализе различных ситуаций, методов, связей и их применение для каждого учащегося составляют предпосылки не только познать мир, перенять в течение столетий сформировавшуюся культуру мышления и деятельности человека, но и помогает ему как в практической деятельности, так и в повседневной жизни.

Выводы *Conclusions*

Во время количественного исследования установлено, что существует статистически значимая связь (взаимодействие) между математическими навыками (функциональным обучением математической грамотности) и выбором трудовой карьеры. Все педагоги, принявшие участие в опросе, подчеркнули важность обучения математической грамотности для успешной ориентировки учащегося в ближайшей среде и дальнейшего обучения профессиональной деятельности и самовыражению, так как математические навыки и процедуры необходимы не только для обучения различных специальностей, но и для решения жизненных ситуаций или проблем.

Установлено, что уровень функциональной математической грамотности учащихся со специальными образовательными потребностями или имеющих затруднения в изучении математики недостаточен, учащимся не хватает практических навыков и понимания, как приобретенные знания применить не только в повседневной деятельности, но и в процессе обучения профессии.

Для того, чтобы учащиеся с затруднениями в области обучения математике не только имели бы теоретические знания из разных областей математической деятельности, но и поняли бы, умели бы применить знания в практической и профессиональной деятельности, нужно развивать все общие математические навыки, математические знания и понимание, математическое общение, математическое мышление, решение проблем. Факторный анализ подтвердил значимость всех выделенных

КОГНИТИВНЫХ КОМПОНЕНТОВ МАТЕМАТИЧЕСКИХ НАВЫКОВ И ОПРЕДЕЛЯЮЩИХ ИХ ЭМПИРИЧЕСКИХ ИНДИКАТОРОВ.

Summary

In vocational training of young people an important role is played by general skills, the ability to apply the knowledge of mathematics and other subjects in practical activity while learning a chosen speciality. The article deals with the attitude of the pedagogues of vocational training institutions towards the interaction of mathematical abilities and the choice of a vocational career in the educational process of students having difficulties in learning mathematics. The importance of the expression of the abilities of mathematical literacy of young people with special educational needs learning at vocational training centres for vocational training has been revealed. For this purpose the survey among the pedagogues of the Lithuanian vocational education institutions was conducted and 124 teachers of professions and subjects of the Lithuanian vocational education institutions educating young people having special educational needs or difficulties in learning mathematics participated in it. Questionnaire survey in the form of anonymous questionnaire was chosen as the main research method. For processing of the quantitative research descriptive statistics and multidimensional statistical methods were used. During the quantitative research statistically significant relation (interaction) between mathematical abilities (development of functional mathematical literacy) and the choice of a vocational career was identified. All the teachers who participated in the research distinguished the importance of the development of mathematical literacy for student's successful orientation in the close environment and future learning, vocational activity and self-expression of a young person. The main mathematical abilities that, in the teachers' opinion, are important and necessary for successful teaching and learning of a profession have been distinguished.

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INNOVATIVE USE OF THE POTENTIAL OF CONTEMPORARY SENIORS

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Abstract. *Attitude to old age varies depending on the cultural context - historical, like changing the public perception of the elderly and attitude to senior age. Since the 60s of the twentieth century in sociology is functioning the concept of ageism, describing the phenomenon of discrimination against older people because of their age. It manifests itself in a dismissive ratio deficits on offer for seniors or problems in the labor market. Social stigmatization of seniors has a direct impact on their physical and mental health. Sense of control over their own lives and to have a sense of whether the purpose is of great importance at the end of professional activity. Halting the process of marginalization of the elderly multi-faceted and complex solutions, parallel, integrated actions legal, financial, educational and psychological. Exploiting the potential which lies dormant in this social group gives positive changes. It becomes an element of counteracting the social stigma of old age, disenchant way of looking at modern senior. This scope for lifelong education, which is a bailout. It creates an action for the activity, gives the opportunity to make changes, positive transgression in the senior phase.*

Actions and initiatives designed to help them adapt to changing social reality and the market, they combine traditional teaching methods (lecture) with active methods (including mentoring). It is used in the process a wealth of experience as seniors. When preparing an offer of educational activities worth including senior-leadership initiatives. This senior-mentoring build on the expertise provides a wide range of knowledge about man and the surrounding reality, by which it is possible to transpose this knowledge from theory into practice. Flexibility in the method is adequate to the problems and needs of seniors, can properly select and modify rules educational activities, so that they are the optimal solution. Senior-mentoring can serve the liberation of spontaneous being and becoming elderly, activating its development opportunities and a nap in her creative potential. Comprehensive measures to help people in late adulthood in the learning process, to acquire new knowledge in the field of self-development and improved skills are an opportunity to make fuller use of the life and free time.

Education towards old age, conducted in the form of mentoring, is based on an individual plan of action, which in effect allows tame old age, it helps to find the meaning of life, develop a model of relationships with significant others, develop defenses and adaptation to difficult situations or emergencies, find in new roles. Senior-mentors, they could play an advisory role, on the one hand would indicate assisting the elderly, preventing their social exclusion and pathological aging, on the other hand, monitor and assist the process of education for old age.

Keywords: *adult education, education toward old age, lifelong learning, non-formal education, old age, positive aging, senior mentoring, space of educational activities.*

Introduction

Depending on the cultural and historical context, public perception of the elderly and attitude towards senior age are changing. In the past, social position of older people was much higher than today. Seniors were entrusted with the highest authorities. Their extensive experience and knowledge were invaluable support. Since the 60s of the twentieth century, social scientists began to notice a phenomenon called *ageism*. It means an unequal treatment on grounds of age. This phenomenon is due to the direct prejudices and stereotypical belief that people in late adulthood are not able to perform certain their social roles. Social stigmatization of seniors directly affects on their physical and mental health. It often causes that they withdrawal from social and family life. The process of marginalization of the elderly should be suppression but it requires various actions and application of comprehensive solutions.

The problem of activation of the 50+ people occurs in all European countries. This situation requires from the government to make some changes in social policy, in the labor market, but also there is need to overcome social and mental barriers. The hardest thing is to convince society that the extension of the economic activity of people over fifty years old can brings positive changes and it will be beneficial for whole society. Change in the situation of today's seniors requires a parallel, integrated actions in the field of law, finance, education and psychology (Adamiec, 2012). The areas of contemporary senior's life are a space of influences, but also they are a challenge for modern lifelong education. The main purpose of education is to educate the people in late adulthood, that the seignioral age does not mean stagnation, sadness, uselessness and live from hand to mouth. It can be a time for self-realization, positive change, it may be a source of satisfaction. One of the forms of non-formal education, a way of activating the development a creative potential hidden inside an older person, is *mentoring*. Mentoring initiatives and actions are designed to valorising the phase of old age. This means that the old age has been given a new or revitalized value through reorganization of social life and change in the social perception of old age.

Education towards old age

European society is aging, so in the near future *age management* will become one of the most important specialization which can help maintain or even increase the productivity of advanced age workers. Creating jobs for mature and experienced workers 50+ allows to use the potential of people during the middle and late adulthood. Promoting solidarity between generations,

encouraging diversity and creating a friendly atmosphere in the workplace, they are a manifestation of corporate social responsibility.

The human aging process effects on the quality of life, both in biological and psychological meaning. According to the concept of seasons of life of adults by Daniel Levinson, an adult individual's life flows to the rhythm and patterns of life that are common to people from different cultural backgrounds (Trempała, 2000). Both, performed social roles, the quality and type of relationship, but also personality traits, make that the course of life becomes an individualized process. However, it can be distinguished the universal values prevalent in different cultures. In the postmodern society old age coincides with the moment of retirement. Qualitative changes in the lives of seniors occur not only in the professional sphere. It changes their social position too. There are redefined roles in society. These changes are also reports in relationship with in the family. Children of seniors leave home, set up their own families, begin paid work, so as a result the family ties are loosened.

When seniors do not have time to adapt to old age, not get used to the new situation, it can become a source of tension and anxiety. The truth is that not every older person can handle on its own with these emotions. Having excess undeveloped time and the lack of a plan for the immediate future, in effect translates into mental condition seniors. At the seigniorial age is changed the culture of free time (Zalewska, 2010), but also it is changed the relationship with life partner. The new model of life or new living environment entails qualitative changes in the senior's everyday life. Retirement, which was to be anticipated period of rest, becomes a source of stress, transfers directly on the physical and mental state of senior. Deteriorating health condition, financial, social position of elderly person becomes reduced. The feeling of loneliness and misunderstanding, lack of sense of life, lack of plans and goals, this all makes that consequences are being felt by seniors but also by other members of society.

Seniors often have no awareness that physical deficits are compensated with development of *crystallized intelligence*, which has a growing tendency in the late stages of life. This is the result of learning and continuous training of the mind. An elderly person uses the resources accumulated over a lifetime. It is up to the individual interests and activities, however, it depends on whether the senior will be able to exploit this potential. Using of its own intellectual resources, is a chance for the long human activity. It does not limited the need for continual learning or diminish of curiosity. What favors the adaptation to old age is a positive attitude towards it, optimism and activity. From individual coping strategies in the next period of life it depends how will look like the old age, what will have the character and course (Oles, 2011). This is a field of action for lifelong education, which has aid character.

The process of learning of people in late adulthood has profound significance for the development of their individual and society. Non-formal and informal education allows individual to customize the process to place and expectations, what is more, the subject is enabled in the planning of educational activities. Lifelong education creates a space for action activity which gives the opportunity to make changes, positive transgression in every phase of human development. Exploiting the potential which lies dormant in the social group of seniors, it gives positive changes, becomes an element of counteracting the social stigma of old age, creates new image of modern senior. Modern actions and initiatives dedicated to seniors, combining traditional teaching methods (lecture) with active methods (such as workshops, training sessions, group work, moderation or mentoring. They are not only attractive way of spending time, but most of all an opportunity for a better adaptation of seniors to the changing social reality and the labor market.

Learning in the period (middle and late) adulthood has gained a new meaning today. Adult participants of educational activity know what they want to learn and what is important to them. They are looking for sources of knowledge and authority, ipso facto taking responsibility for their own learning process. The idea of lifelong education fits the needs of modern seniors, who often have no idea for the management of their time after retirement. An important for quality of life is to make society more aware of the fact that seniors have experience and accumulated knowledge, which can give to society. The old people have untapped potential and energy reserves, which skillfully activated can give the old people a new quality, gives them chance to have more satisfying life. It is a challenge for education, the labor market and authorities. Reflects of changes in social consciousness are national and local programs, many initiatives which function as supporting the activity of seniors.

Change requires individualized actions, appropriate education, working with modern seniors, but also with people during middle adulthood. They have to be prepared for new roles, aware of possible paths of development that allowed them to adapt to a rapidly changing world and society. Prevention may be e.g. adopting of proper lifestyle, working out in own strategy, specific habits and skills to cope with new social roles. On the market there is no lacking of offers which are dedicated towards seniors. But mostly, they are directed to a small group of people who knows exactly what they are looking for. They can reach the proposals and choose the most suitable for themselves. The problem is a group of seniors who doesn't fully aware of their own potential, have a real problem with identifying their interests and an excess of free time, which cannot alone fill in the content. The practice of everyday life building „bottom-up” the social capital of the elderly. Creating situations and events involving seniors in cultural, artistic, educational, sports or volunteer activities, encouraging them to

participate in social life can be a great opportunity to help them in establishing proper interpersonal relationships. That all gives older people a sense of being needed, a sense of happiness and life satisfaction. Banks time, book clubs, interest clubs, religious groups, Universities of the Third Age are examples of how seniors can appealing and efficient spend their free time. Unfortunately, these initiatives are still more like an experiment than regular activities in social policy.

The condition for success is to develop in seniors certain habits and skills that will allow them mentally adapt and adjust to retiring. The plans, which are made for the future by pensioners, are mainly related to planning leisure time. They want to share more time with their families and friends or spend time on activities related to the readership or gardening. Rarely seniors set a goal of self-development, of broadening their own horizons or the realization of dreams. Activities and educational initiatives dedicated to the elderly focus on aspects such as: education for culture, information technology, civic education, creativity and health prevention. Today increasingly the internet platform is becoming a tool of social change. It is now daily communication space. Older people are increasingly willing to learn new forms of communication, because it gives them the opportunity to reach to the group with new contents and offers (including educational offers). All forms of communication are building and maintaining relationships with the community, gives seniors a sense of integration which allows them to share the experience with others. One of the forms of lifelong learning in the seigniorial period of life can be *e-coaching* (understood as teaching, assistance, providing advice ward, building relationships based on trust, with using the Internet). The opportunity to be part of the network society prevents social exclusion of seniors. Knowledge of new technologies gives seniors unlimited access to information and materials without leaving home. Overcoming their own limitations (physical and intellectual) contributes to improving the quality of life of seniors. Internet gives them a tool to communicate with loved ones (especially in a situation of migration senior's children), it allows them to maintain social ties or participate in family life, despite the distance. Via the Internet the elder people can make new friends, take advantage of the offers, develop and share their passions and thoughts.

The speed and extent of aging is determined by factors such as social conditions, individual predispositions units defined character traits, health condition, lifestyle, certain habits. Seniors' conscious decisions and choices, taken in the context of their own biography and broadly defined health are crucial for the well-being (Koziel et al., 2008). Sense of control over seniors own lives and to have a meaning of life is of paramount importance aim for older person, not only during its working lives, but also afterwards. A manifestation of responsibility seniors for their own lives, for old age, is the

need for the activity and willingness to participate in social life. Maintaining social ties gives meaning to existence, it can enter into new social roles, easier to deal with the deficits associated with age and traumatic events. Public participation is an expression of self-creation in late adulthood, is a symptom of the process of healthy aging, which translates directly to quality of life and well-being of seniors (Bee, 2004; Pietrasiński, 1990; Steuden, 2012).

Mentoring as an innovative method of working with senior

Mentoring is one of the forms used in lifelong education. It is the teaching, helping to overcome adversity, providing advice and support, is a method of improving the ability of independent and responsible for achieving targets. Mentoring is a concern for self-development and reflective approach to individual own biography. It is synonymous with motivation, encouragement to overcome the barriers inherent in man, to increase its productivity and develop a key competences essential for the development. Mentoring relationship contributes to building self-confidence in an older person. It explores its own potential and the meaning of life. Professional help from person they can trust and who knows their needs with the phase of their lives, that is needed support for people in late adulthood. Working with the senior with mentor, the selection of the strategy would depend on the sense of control, internal motivation, the prospects for the future, optimism and a set of values preferred by senior.

The basic premise of mentoring is to work with dependents, based on the plan approved by senior personal development. Mentoring work is focused on discovering and developing the potential of the mentees, stimulating and motivating to act, supporting self-development. Both professional and personal development, is associated with continuous improvement of your competence, with acquiring new skills, analyzing and interpreting lived experiences. The ability to self-realization of the goals and the desire to act requires support from more experienced people who have necessary knowledge, skills and competencies. Mentoring situation is similar to the situation of the advice. It is a meeting of individuality. In a particular space and time comes to cooperation. The main aim of this cooperation is to determine a direction of the desired changes (Czerkawska, 2012). Whole activities under the mentoring relationships tend mainly to self-realization and self-development.

Mentoring relationships based on partnership. It is organized, voluntary meeting aimed at mobilizing the subject of educational activities (in this case, senior) and his creation of the right atmosphere and conditions for self-fulfillment and self-development. Participant in educational activities becomes responsible for its learning process and decisions. However, in this process senior needs a specific support. It is an area of senior-mentor activities. Senior-

mentor will be a person who accompany an elderly person in the investigation into the truth about itself. This kind of personal guide supports and influences on senior's educational process, creates a favorable environment for self-development, arouse in an older person a desire to independent learning. Senior-mentor inspiring and motivating ipso facto reinforces in an older person the sense of agency, control over its own live, a sense of self-worth.

Therefore the aim of the senior-mentoring would be comprehensive measures to support people in late adulthood in the learning process, to acquire new knowledge in the field of self-development and improvement of skills that will allow them to get more out of life and free time. Individual work with the senior-mentor can identify preferred learning style by an older person. Among practical implications of the senior-mentoring it can be specify as: getting acquainted with senior's learning motivation; encouraging in self-education, using senior's life experiences and skills; analyzing the positive and negative experiences from all sphere of life; encouraging to make reconstruction of individual life history; strengthening the reflectivity with regard to the life course, events and achievements; stimulating creative potential, curiosity about the world and people; assisting in determining the next goals and tasks, which can be in the future a source of life satisfaction. The senior-mentor should accompany the old person in its aging process. That is why in this mentoring relationship he/she should take on a role of: a leader, a counselor, a guide, a teacher, a tutor, an expert with highly professional and social qualifications. It should be a person who can share its knowledge, experience to creates a new perspective and helps older people finding alternative solutions for their problems. Senior-mentor should know how to discover seniors' skills and passions, teach them how to control emotions and behaviors.

Pattern of the old age phase includes professional activity (extended through continuing education and mobilization programs for employees 50+), active citizenship (participation in social life, engaging in pro-seignioral's and intergenerational initiatives), healthy lifestyle (prevention and psychological support), financial independence (disposal funds providing social and health security) activities delaying the aging process (broadly defined proactive lifestyle), and building a correct relationship and participation in the circle of family and friendly.

Among the determinants of life satisfaction it can be exchange: internal harmony, meaningful activity, the implementation of goals, sense of agency, happiness, belonging and self-development. The mental welfare is largely determined by personality traits (specific competencies, attitudes, behaviors, habits, social skills, or subjective sense of health). The most important factor of personality is considered *ego resiliency*. It refers to the maintenance, revitalization and improvement of mental and physical functioning of the

individual in relation to new challenges. In a direct way it impacts on the physical fitness, mental well-being, quality of interpersonal relationships and the level of involvement in an elderly person. Locus of control of life, belief in self-efficacy, the ability to anticipate events and plan activities allows seniors to maintain a sense of security and inner peace. They begin to believe that they are able to cope with the changing life situation.

Senior-mentoring can be a proposal to work with people both in middle age and late adulthood. Jointly developed solutions allow people to fill the mental emptiness (e.g. an empty nest syndrome or a mid-life crisis) and also it is alternative management of free time. Solutions allow to form goals, lay out new paths of development, help to rediscover in the modern world. It contributes to build and strengthen interpersonal relationships, establish deeper social ties, encourage to take responsibility for seniors own lives and make decisions without fear and concerns that they will not handle with problems. An important issue in the mentoring process is a high level of motivation of educational units, the orientation of life and the belief that educational activities are a tool for the implementation of plans and development tasks. People in seigniorial aged are in the privileged position. In contrast to the younger generations, they are exempt from many duties, shall not be subject to numerous limitations associated with taking on their social roles. They have the time and opportunity to participate in educational activities, it just depends on them.

„Old age does not necessarily mean passivity, resignation, everything. On the contrary - suggests such life goals, and such opportunities, which vainly sought in the earlier stages of life” (Łosiewicz, 2004). Many seniors looking for their own formulas, including educational. They are people who are full of passion, energy, willingness to act and to share their experience. They often provide assistance, practicing active lifestyle in its various forms. They have the time and they are opened to new experiences, but sometimes they are not aware of their potential, they don't believe in themselves. This group needs especially senior-mentor help. A person of senior-mentor don't need to be necessarily younger than the participants of the mentoring process. A better solution would be to use the experience and competence of person in the middle or late adulthood, who arouse more trust in seniors and becomes quicker an authority for them, because they like no one else understands changes related to the phase of life. These senior-leaders, much easier than younger people, will be able to establish relationships with the older participants of mentoring process. They will perfectly understand the emotional and spiritual needs, expectations and limitations of people in seigniorial age.

It would be worth to create in a social space workplace for well-educated senior-mentors, who would have the task to show older people how to learn, how to effectively search for and use information in order to solve the problems.

Senior-mentor would combine within its competence function of social and educational mentor. On the one hand, senior-mentor would indicate support for the elderly, preventing their social exclusion and pathological old age. On the other hand, he/she would monitor and assist in the process of education for the old age. Senior-leaders / senior-mentors along with seniors take actions and initiatives concerning on heritage of the region, the production of goods or services for seniors. The initiatives, which include senior leaders in the programs, can bring very good results. Senior-mentoring which will be built on the expertise undoubtedly will have several properties. It will be based on extensive, but a detailed knowledge about individual and the surrounding reality (it will give a chance to transpose knowledge from a theory into a practice). The flexibility of approach to the problems and needs of seniors can be properly selected and modified the rules of an educational activities. In the context of pragmatic application solutions it will be a procedural knowledge, focused on the search for alternative ways to solve problems, the formation of accurate applications, allowing senior has the opportunity to develop a personal strategy to cope with new, often difficult situations. Creating a network of professionally trained senior-mentors would attempt to meet the expectations of the older people. Each senior, who will work with mentor, would gain an access to new services, will have an individual plan of action adapted to individual needs.

Practical implications of the senior-mentoring will be inextricably linked with the concept of lifelong education. Adapting to rapidly changing world, requires from seniors an extraordinary flexibility, openness, willingness to take risks and new challenges. Therefore, it is not only the domain of the young people. Education towards old age, conducted in the form of mentoring, will be based on an individual senior's plan of action. In the effect it will allow for tame the old age, help to find the meaning of life, develop a model of relationships with significant Others, develop defense and adaptation mechanisms towards difficult or crisis situations, help to find itself in new roles.

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THE ROLE OF LIBRARIES IN PROMOTING ADULT EDUCATION

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Abstract. *The article discusses the function of the library in the changing society and educational activity among elderly citizens. The growing number of elderly people in a society requires permanent revision and adaptation to the new conditions of education, social security, economy, health protection areas. Today the function of the library is seen as a multifunctional institution for education, leisure, culture, information and recreation. Modern library through participation in many programmes and projects provide elderly people with training in computer and digital skills, and functional literacy. Participation in library events enhances activity, engagement, participation in society's life of the elderly.*

Keywords: *older adults, education activities, libraries.*

Introduction

Ageing of population and the consequences of this phenomenon create challenges that draw researchers' attention worldwide. The Lithuanian National Programme took the consideration of the problem: "Though many a measure is implemented for provision of active personal, public, professional and cultural lives for senior citizens, these measures do not meet all the required alterations for the welfare of the elderly completely, therefore, there still remains the need to combine efforts to build environment in which the elderly would live active personal, public, professional and cultural life" (National Programme for 2012 European Year for Active Ageing and Solidarity between Generations, 2012).

One of the positive developments in the current period in Lithuania is the growing number of organizations and institutions, which provide adult education, senior adult education, cultural activities and a wide spectrum of services (Zemaitaityte, 2012). Today the key measure in the state policy for the elderly is the adoption of the National Strategy of Overcoming Consequences of Ageing. The National Strategy indicates that: "One of the goals of the national culture is to provide the society and every member of this society, also older people, with the possibilities to take part in cultural life, to choose the preferred leisure activities and to find ways for self-expression." (2004, p. 23). With regard to this goal every year the budget of the Republic of Lithuania provides support to culture and art projects and programmes, and municipalities give platform for the amateur production and local community outputs. The

important role is assigned to libraries, which are active in dealing with social exclusion, employability, education and lifelong learning issues of adults and take steps in providing conditions for their active cultural lives. Lithuanian Seimas, on reviewing the function of the libraries: authors` nights, book discussions, meetings with the writers, promoting young writers, growing libraries` depositories, and taking into account the immense value of these functions for the development of the society and for the education of the national spirit and culture announced 2016 the Year of Library.

The paper seeks to discuss the role of libraries in the development of adult education in Lithuania, the ways older people engage themselves with these activities; the challenges that libraries meet in providing these educational activities.

The concept and the function of the library

Traditional library (Greek word *Bibliothēke* - *biblion* – means *book, the ke – storing place*) is a selection or a collection of properly indexed, systemically aligned books. Oxford dictionary (2007) defines a library as “a building or room containing collections of books, periodicals, and sometimes films and recorded music for use or borrowing by the public”. In the Law of the Libraries of the Republic of Lithuania of 2013, a library is defined as a juridical person founded in accordance with the existing laws and regulations and acting as such in the dissemination of information, culture, science and education areas and performing the functions of a library or a structural part of a juridical person empowered to act as a library. Jovaiša (2007) defines library as “a cultural and educational institution who stores books, periodicals and other publications, provides for the informational needs of the readers as well as for their scientific, technical, artistic interests, and organises educational activities. It is also an institution for developing a social individual” (Jovaiša, 2007, p. 38).

The key functions of the library are assembling, classification and storing of books, manuscripts and periodicals; these are broadly acknowledged functions of preserving humanity`s memory. Modern definitions stress social and communicative (public dissemination of news, information and documents) character of the library (Mizzi, 2008; Reardon, 2011). Petuchovaitė (2004) lists five key areas that received the most attention in the recent functioning of the libraries:

- 1) development of information society, embracing information technologies, internet and data bases access, services for the target user groups;
- 2) development of the educational and training activities as a provision for lifelong learning;

- 3) development of culture, cultivating traditions in ethnography, museum, book and reading, and publishing functions;
- 4) social inclusion and community building development, targeted community building services, integration initiatives of disabled groups and other socially challenged groups, fostering of civic education;
- 5) provision for leisure activities, services for organising events and festivities.

One of the main goals of the library is to disseminate information and knowledge in the collaborative attempt to advance the society intellectually, economically, socially and culturally. Library as a critical actor in organising information, culture and recreation activities, it promotes open and active society. Library rests on the socially contracted principles of dissemination and preservation of culture and scientific information obtained by the humanity in its historical growth. Recent technological transformations caused by the globalisation did not abort these tasks but, in reality, enhanced the potential of the libraries to take part in building economic and social welfare. Lithuanian Seimas, on reviewing the function of the libraries: authors` nights, book discussions, meetings with the writers, promoting young writers, growing libraries` depositories supplies, and taking into account the immense value of these functions for the development of the society and for the education of the national spirit and culture announced 2016 the Year of Library.

The system of Lithuanian libraries consists of: Lithuanian national library, district public libraries, municipality public libraries, research and educational institutional libraries, school libraries (with the exception of higher educational institutions), special libraries and other libraries (Law of the Libraries of the Republic of Lithuania, 2013). Researchers remark that public library type is much newer than research, national, university or school library types. While document storing and preservation for the coming generations, providing for the intellectual and cultural continuity are among the foremost national, research and academic libraries` goals, the public libraries, in the opinion of the researcher, aim at dissemination of knowledge, information, culture and experience for the end users, and for free access to all. Therefore, the mission of the public library is to guarantee free access to information and news for all members of the society, to promote democratic, free and open society (Glosienė et al., 1998).

Today library functions as a complex society oriented institution of education, leisure, culture, information and recreation. To provide full access to information resources the libraries have to network both locally and on a broader scale for internalising and developing technologies of information search and processing. Therefore, a library in its modern mission, in its function and mode of operation is a hybrid social institution, open and responsive to the changing

needs of the society and sensitive to its own internal transformations. As noticed by Kirtiklienė (2008), the library function is influenced not only by the Lithuanian laws and programmes alone but also by the modifications in the model of the developing society and in habits of life. To meet the new goals for the library it is far from suffice to have a library per se with full depositories and to remain passive until someone will make avail of those. From the institution that stays passive and its function in society is rather lateral, the library turns into an active player on the social scale (Evans & Ward, 2003; Petuchovaitė, 2004).

Though library traditions are set and they are observed, library development indicates that the capacity to change with the changing society needs, market situation and, in particular, with the new technologies is indispensable condition for the library existence. As is stated by researchers (Petuchovaitė, 2004; Lamanuskienė, 2006), the fundamental modernisation is a principal condition for advance development and for effective cooperation with local self-governing bodies. Partnership of successful libraries includes partner cooperation with local self-governing institutions and participation in the networks of other institutions and individuals. Lithuanian public library system connects 60 municipality public libraries with 1340 branch libraries and five district libraries (Statistikos Departamentas, 2014). Administration of the libraries is handed over to local municipalities` and this allows developing decentralised management of libraries. This situation causes greater diversity of library services and roles, conditioned by the library potential and by the community interests (Senkus, 2007). The strengthening of public relations allow to maintain adequate relations with all stakeholder groups, to provide an actual image of the library activities and possibilities, to respond to the requirements of the organisations and enterprises.

One of the key goals of the modern library is client satisfaction. The key attention directed towards the end user is indicative of the general trend of societal development. The end user may come to the library guided by many informational needs. The individual seeks to issue a book or find some literature on a certain topic, to deal with some indistinct informational need and at the same time the individual might pick a book for a weekend, review an exhibition, use computer or just list through the newspapers. Library employees familiar with their social, economic and cultural environment are apt to construct different library function areas (Kirtiklienė, 2008). UNESCO Manifesto of Public Libraries (1994) stresses that constructive cooperation and democratic growth depends on education, open and limitless opportunities to gain knowledge, free use of information and cultural assets.

Current moment in history for the librarians has become a critical revision period for the library`s mission, functional upgrading and for the identification

of their own niche in the ever changing society. The modifications in academic function, science integration, development of science and technologies, speedy growth of information and communication technologies, dominating input of the market are the main reasons for initiation of the change of traditional libraries (Duobinienė et al., 2004).

Library assisted adult education

An adult individual guided by the need to know comes to a library as to an institution of informal education with the intention to develop intellectual and creative powers, planning for wider social acclaim, denser communication, self-realisation. This adult individual seeks to learn because his learning goals are shaped by self-education. Self-education, as a most individualised cognitive activity, develops an all-sided, harmonious personality and helps in one's societal establishment (Tight, 2007; Žemaitaitytė, 2012). However, Lithuania is still dominated by the valuation of education which provides formal qualification supported by some sort of diploma, while education which is based on an individual initiative of the learner and related to the cultural and personal development often is not regarded as education at all. M. Teresevičienė (1999) states "we tend to ignore or not to regard as educational activities and, consequently, not to collect statistical data about education leading to individual development and based on the individual initiative of the citizens and, clearly, contributing to the growth of lifelong learning" (Teresevičienė, 1999, p. 115). Thus, learning may take place outside specially geared educational environment (educational and learning institutions), it may happen in the environment other than educational: in libraries, culture institutions, non-educational institutions, open areas. As is marked by Longworth (2007, p. 119), "culture institutions, museums, art galleries and libraries adapting to the Lifelong Learning age requirements undergo stunning transformations". N. Longworth (2007) indicates that three crucial factors that motivate adults to learn are easy acceptance, secure environment, positive assessment of the possessed skills and abilities, and the excitement to continue studies. All this, without doubt, adults find under the roof of a library.

It is important to draw attention to the fact that libraries are often seen as participating in the education which is interpreted and analysed as functional literacy development – both in children and in adults, and as promotion of reading. Traditionally literacy was seen as individual ability to write, read and show numerical skill, and it was associated with school and education. However, recent decades brought up the strand of *New Literacy*, when literacy is interpreted as a multiple phenomenon, its social and functional aspects are particularly stressed, i.e. literacy is seen as the individual capacity to carry out

writing tasks in the attempt to perform certain social functions in the community (Tamošiūnaitė, 2013). In A. Wagner's & R. Kozma's (2005) view literacy in information society indicates that apart from the understanding of a text, one needs to use information communication technologies for the information search, analysis, evaluation and apply all for dealing with problems and in construction of new knowledge. This gives ground for the appearance of the information literacy term, which is most often identified as "an ability to find, assess and apply different information, ability to learn, understand and know the ways of storing information" (Glosienė, 2006, p. 186). Researchers (Feist & McDougall, 2013; Watering, 2006) highlight multiple effects of new technologies on humanity: they are related to the developing of material and spiritual values, social and cultural environment.

Researchers (Mockus et al., 2013; Miežytė-Tijūšienė & Bulotaitė, 2012) stress that social activity as a form of active life contributes to the wellbeing of an elderly individual. Scientific research data show that social activity and inclusion is very useful to elderly people since they diminish risks of mortality, boost daily function, may assist in protecting and maintaining psychic health. In A. Mockus' view (2013, p. 342), "educational and social activity group interventions directed towards specific groups may reduce social exclusion and solitude among elderly people". Interpersonal relations and engagement into activities are very important social factors in building life satisfaction in elderly people. A. Samėnas (1995) remarks that educating the readers, forming and developing a reader's individuality, supporting effectiveness of reading are joint library and readers' activities. The society in its appreciation of the information and communication, seeks to involve more citizens in the function of a library, and to develop quality readers. Though a library alone is not capable to deal with this task (not all citizens are readers at the library), yet, in the opinion of A. Samėnas (1995) libraries make the strongest part in the development of the readers, since they dispose of the richest resources and opportunities to impact upon the reading contents and manner; they are also the place for informal communication. To let an individual feel independent, active, responsible citizen and enjoy the individual growth, have better professional career opportunities an individual requires informational communication competence and functional literacy skills. However, one of the modern demographic crises features is diverse digital literacy levels among citizen groups (Selwyn et al., 2014).

By announcing 2012 a European Year for Active Ageing and Solidarity between Generations European Commission directed attention to the global societal ageing phenomenon and its consequences. European Commission encouraged European Union member countries to look deeper into global societal ageing and approach it as an area of untapped societal resources. By promoting activity of the elderly people through their engagement and

involvement in the life of society and enhancing their opportunities of independent life their input into society is emphasised; elderly citizens can take an active part in the life of the society and establish links between generations. These goals are observed by supporting elderly people`s functional literacy on the European Union level and on the national level. Through implementation of different programmes and projects the elderly people acquire opportunities to augment their computer skills, numerical abilities and stretch their functional literacy, their activity, engagement; participation in societal life is supported.

The opportunity to use information technologies and the required information competencies should not depend on gender, age, income no place of residence, however, Universal Computer Literacy Survey carried out in 2009 in Lithuania showed that an average computer user in the country is a young, educated, employed citizen with an income larger than average. (Kalvaitis, 2009). Computer was not used or seldom bussed by an elder, mostly retired citizen. The Survey showed that functional literacy of the elder people in Lithuania is rather low (Kalvaitis, 2009).

More recent research indicates improvement of this situation. According to the Department of Statistics data in 2011 in Lithuania 63 percent of citizens aged 16 – 74 used computers, in the age group 65–74 years old 12 percent of citizens were able to use computer; in 2013 almost 69 percent of citizens aged 16 –74 used computer. In 2013, 15.1 percent in the age group of 65–74 years old used computer (Informacines technologijos, 2013). This positive tendency in Lithuania appeared, among other factors, due to the project “Libraries for the Progress” which was implemented according to the international tripartite agreement among the Ministry of Culture of the Republic of Lithuania, Lithuanian National Martynas Mažvydas Library and Bill and Melinda Gates Foundation. By supporting and applying to use the resources of public libraries it was aimed to motivate Lithuanian citizens to have better library access and to use different information technologies. Within several years Lithuanian public libraries developed into institutions that take active part in dealing with citizens` digital exclusion. 1276 public libraries participated in the project “Libraries for the Progress”, among these the central public libraries, rural and urban public libraries and their subdivisions took part. 891 libraries out of the total number were supplied with technical equipment for the public internet access stations and for other electronic services provision (Bibliotekos pažangai, 2012). Almost over the whole territory of the country (cities and rural territories) citizens gained physical access to computers and internet. Individuals who do not possess a computer or have no access to the Internet at home can find a free public access point to such technology within a distance of 5 – 7 km on the premises of a library. In the attempt to equal off the unevenness of the infrastructure and to give the population equal IT access a large portion of

computers and other technical equipment was stored in the libraries. This projected activity gave results, in 2011 technical divide between urban and rural libraries practically disappeared. 52 percent of rural area libraries participating in the project “Libraries for the Progress” provided public internet in 2008, in 2011 the number of such libraries grew to reach 97 percent (Bibliotekos pažangai, 2012). Internet users in rural libraries made avail of Internet services more often. In 2009 rural public library branches provided free Internet services to about 20 percent of the users; in 2011 this number grew to 28 percent. Urban libraries, which in their majority could use public Internet access before the project, also showed a considerable though numerically smaller growth from 88 to 99 percent (Bibliotekos pažangai, 2012). A marked change was brought into library work by the participation of librarians in the training courses and following computer literacy (information, digital etc.) trainings for Lithuanian citizens organised in Lithuanian libraries. In 2009 for providing in-service librarian training a network of training centres involving qualified professionals consulted users on a daily basis for the development of digital skills and their upgrading both in the urban and rural areas. 11 centres opened 222 study places, half of these were mobile. Library employees after taking digital literacy courses organised by these centres called computer skills courses for the library users themselves. In total, 2700 library employees took part in the courses organised by the project “Libraries for the Progress”, over 75 thousands citizens took part in the library courses organised by the librarians. In 2011 library digital literary courses were attended by a number of disabled, unemployed and rural dwellers 4 times exceeding the previous years, the number of retired people exceeded previous number 5 times (Bibliotekos pažangai, 2012). In some places, making avail of mobile computer classes, the courses were organised outside library premises, for example relocating them into the rural community premises. However, the significance of the project for librarians and for the library users did not lay solely in the technological equipment provided and installed by the project “Libraries for the Project” implementation activities. No less significant is the fact that the project activities involved updating and modernising many library structures (Bibliotekos pažangai, 2012).

In 2014 the project “Libraries for the Project 2” team and Lithuanian National Martynas Mažvydas Library (Kokybinis bibliotekų vaidmens pokyčio tyrimas, 2014) carried out a quantitative research into library function change. For the research purposes library directors and project coordinators were interviewed. The results showed how the library role, status and place in society have changed over the period of 5 to 10 years: the change stretches from the location where the books are issued to a multifunctional complex with diverse activities. In discussion about the future of the library two broad areas of change were identified – changes following the societal alterations, i.e. library as an

institution responds to the common and group interests; and library as an educational and training institution, in that case library will change at a greater speed than the whole society and the social environment.

Conclusions

By way of concluding, we may point to the emerging new model of the library as a multifunctional complex. Within the context of the societal transformation the key mission of the library and its functional priorities refurbish themselves, the function of the provision of information and digital literacy surfaces to the top addressing the needs of elderly people, in particular. These changes are determined by the society experiencing changes life needs. Within the context of radical changes in society and in the field of information services libraries are searching for the new models of function and structure to match the scope of needs of the end users and to put technology to quality service provision. Most importantly libraries develop into guarantors of democracy in the information society, and of free information and knowledge access and dissemination.

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THE PROBLEM OF USING OPEN EDUCATIONAL RESOURCES IN THE LITHUANIAN LANGUAGE AS A LESS WIDESPREAD LANGUAGE IN THE WORLD

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Abstract. *The demand to promote development of Open Educational Resources (OER) in less used languages is relevant all across Europe. Although numerous education resources are available today, their access in the Lithuanian language is very scarce.*

The aim of the article is to reveal the importance of OER in the Lithuanian language for the development of teachers' competences. This is crucial to assure the quality of teaching material by providing a possibility to disseminate innovations, to develop creativity and consistency as well as to share created teaching resources.

The article is based on scientific literature analysis and descriptive methods.

OER in Lithuanian are crucial to assuring the quality of teaching material by providing teachers a possibility to develop their competences, creativity, and consistency as well as to apply innovations and share the designed resources of teaching.

Keywords: *less used languages, Open Educational Resources, teachers' competences, teaching and learning quality.*

Introduction

The demand to promote the development of OER of less widespread languages is relevant not only in Lithuania but all over Europe. In Europe OER are supported by the European Commission regarding Open Education initiative to promote learning and teaching methods involving information and communication technologies (ICT) as well as their contents, and in principle improving OER access and permissibility. Although many of education resources are today easily accessible, in Lithuanian they are rather scarce. However, the first steps have already been undertaken. Guidelines of the Lithuanian language development in information technologies were designed in 2013-2014 in order to ensure well-rounded use of the Lithuanian language in a

digital field, to establish the status of the Lithuanian language in the information society, to protect the language from a so-called digital extinction and reduce isolation of Lithuanian-speaking community in a global knowledge society. These aims are expected to be realized by increasing resources and developing tendencies of a language. Guidelines were designed with regard to outcomes of implementing the programme of the Lithuanian language in the information society in 2009-2013 and state of technologies aimed at the Lithuanian language.

The guidelines were developed following the documents State development strategy “*Lithuania 2030*“, the Law on a National Language, Lithuanian Information Society Development Programme 2019, provisions of EU New Multilingual Fundamentals Strategy and European Digital Agenda “*2015.eu*“.

According to UNESCO, the use of one’s native language in formal education is an essential condition for a successful learning and mental development. Application of OER in the Lithuanian language would encourage teachers and learners to think creatively. It would contribute to the improvement of teaching and learning quality, emphasise the importance of teachers when developing and fostering learning/teaching resources.

The aim of the article is to discuss the importance of OER in the Lithuanian language in order to develop teachers’ competences. The objectives of the article are as follows: 1) to review Lithuanian and foreign authors’ scientific works related to OER 2) to outline possibilities of creating and disseminating OER in the Lithuanian language.

The article is based on scientific literature analysis and descriptive methods.

OER in Lithuanian are crucial to assuring the quality of teaching material by providing teachers a possibility to develop their competences, creativity, and consistency as well as to apply innovations and share the designed resources of teaching.

Review of a scientific literature and legislation on OER

OER are defined as “teaching, learning and research materials in any medium, digital or otherwise, that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions. Open licensing is built within the existing framework of intellectual property rights as defined by relevant international conventions and respects the authorship of the work” (Bradley & Vigmo, 2015). Globalisation of OER in the world has been known for a long time. However, the majority of OER is stored in most widespread languages. OER are scarce in rarely used languages and, thus, the aim of

LangOER project currently implemented by the European Union is not only to raise the problem but also encourage states of rarely used languages to pay more attention for creation of OER. Less widespread or rarely used languages are defined within *LangOER* context as languages spoken by a small part of people or those overdominated by more widespread languages (Bradley & Vigmo, 2015). The Lithuanian language is not the only one. The project also includes Dutch, Frisian, Greek, Latvian, Polish and Swedish languages whereas the situation of Danish, Estonian, Norwegian and Icelandic is analyzed additionally. Surely it is only a small portion of languages spoken by relatively few individuals.

OER are closely related with information systems. According to the data of the European Commission research, Lithuania is one of the countries, where teachers rarely use information technologies during lessons. Therefore, the initiative “*Open education*” was undertaken. It is supposed to provide conditions and the opportunity for teachers to be more capable of digital teaching so that they could teach students more efficiently. Teachers’ qualification improvement is supported by the initiative “*Open education*”, using open teaching courses following projects of Grand Coalition to foster occupation in the digital sector and designing new European platforms for practical teachers’ communities in the EU or renew the existing ones.

Rapid development of information technologies in Lithuania makes an impact on changes of teaching processes and methods. Blended method of learning is applied in Lithuanian schools. As a result, it is crucial to talk about its quality, i.e. employment of both digital content and aids of the lessons. Regarding the fact, a number of scientific works analysing aspects of applying information technologies in the teaching process and related issues is increasing. Nevertheless, there are not many of such works, as it is still a relatively new research object. One of innovative teaching methods is application of OER in the teaching process. OER are not very popular in Lithuania because they are related to certain innovations: it is not only the ability to master information systems but also sharing the already created products in the public domains. It is in turn related to legal basis of copyright material and tools, which in Lithuania is not clearly defined. Furthermore, authors’ rights and concepts as well as responsibilities of their violation and violators are not well defined either.

The use of OER in teaching is important and relevant to both teachers and students. For students they give new learning experience because the teaching process combines the main senses, i.e. eyesight, hearing, and mental activity. Image and sound reinforce perception of the demonstrated material, develop the skill to evaluate the discussed object in a complex way. OER encourage teachers to use innovative, blended teaching methods while rendering the topic and to involve students when learning uninteresting or complicated themes. It all calls

for improvement of teachers' qualification. On the other hand, disregarding OER advantages, teachers still encounter certain problems. Teachers have not enough experience to provide teaching, select appropriate teaching methods and ways. Although teachers can use information systems really well, one cannot forget that "full-fledged preparation of high-quality teaching content as well as access and validity of IT measures for the designed content are very important" (Gudonienė, 2013). As well as this, innovative methods are more time-consuming when preparing for a lesson if compared to traditional ones. Thus, in this case sharing of the created material becomes important. Open access to learning/teaching resources is very important because when sharing the material, one saves time. A variety of visual material for the same topic emerges and a teacher can select the most appropriate one for a certain group of students. These problems in Lithuania are analysed by (Gudonienė, 2013, Gudonienė, 2011, Čiužas, 2007, Burneikaitė, 2005).

In order to understand the benefit of using OER and advantages of their application, (Teresevičienė et al., 2015) authors of the book more thoroughly reveal the issues of OER in general teaching/learning context, introduce the reader to reasons of OER emergence and development in Lithuania whereas authors describe methodologies of creating OER repositories, discuss the aspects of benefit and applicability (Sabaliauskas et al., 2011).

A part of Lithuanian scientists devote their works to the analysis of distant teaching issues. They pay huge attention to peculiarities and structure of distant teaching, which is important when storing and rendering information (Abarius, 2009), as well as a lack of distant teaching experience, which could be reduced only by blended studies, applied in particular in the systems of higher education (Čiarnienė et al., 2012). This experience could be reinforced by OER employment in schools. Apart from the information they gain, students would also obtain learning experience by using OER. As Čiarnienė et al., claim (2012) IT eliminate time and distance limitations and provide students with the possibilities of open and distance learning, allow access to information anytime and anywhere, even with mobile terminal devices. IT can be used in the learning process in several ways – starting from information delivery and ending with cognitive tools.

Thus, there are not many scientific works concerning the issues of OER in Lithuania. However, one can envisage the already forming aspects and problems related to the use of OER in the Lithuanian language. One can assume that in the future there such research will be more frequent as the implemented projects and development of innovative teaching/learning methods stimulate teachers and students' interest in changes while this in turn encourages improvement and development of teachers' competences and search for innovations. Accordingly, science is concerned with this issue, analyses changes, their outcomes, makes

proposals, extends awareness of such research whereas state-issued documents, which promote development of projects, dissemination of information, and interest in benefits of OER, provide favourable conditions for science development.

In foreign countries OER are applied for education more extensively. It is manifested by abundance and variety of scientific works on this issue. In spite of this, projects, seminars, conferences and other events are organized in different countries for development of OER. For instance, *opening up Education, Kroes and Vassilion* (2013) projects promote educational development and quality by opening education resources to a large learners' community. Attention is paid to OER development in combination with digital networks. This development is outlined in European Commission Strategy (ET 2020) and new Erasmus+ and Horizon 2020 programmes. Research findings concerning OER employment in rarely used languages were introduced in Oslo, ICDE international seminar. Moreover, on May 9 2014, EFQUEL Innovation Forum and International LINQ Conference were organized in Crete, where numerous indicators of quality of multilingual OER repositories were provided. As well as this, dissemination priorities were defined and insights were shared.

Foreign experts famous worldwide, namely Paul Kelly, Jean-Louis Maxim, Robert Schuwer, Tian Belawati, Carina Bossu, Grainne Conole, Giles Peper and others, working at universities and consulting networks on the issues of OER, which foster distant teaching ideas and practices, expressed their opinion and insights about OER as well as development of OER repositories in rarely used languages (Bradley & Vigmo, 2014). Much attention is paid to free access to already created education resources so that they could encompass all teaching/learning levels. The importance of openness and sharing of these resources is emphasized (Belliston, 2009, Mallon, 2015, Downen, 2007). Works of foreign scientists analyse what impact on education systems is made by application of OER, problems of introducing innovations when applying OER, and the policy of using OER at the universities (Geser, 2012) are discussed. It is claimed that OER provide multifold benefit, i.e. from academic cooperation to economic development (Johnstone, 2005). Possibilities and challenges of using OER are discussed (Downen, 2007). It is a small portion of scientific works, which analyse OER, importance and development of their application as well as their free access. Nevertheless, one must take into consideration that OER in less widespread languages are not much covered whereas the latter are significant not only as teaching/learning sources but also as promotes of their own language and cultural identity. This aspect for widely spread languages is not that important. Perception of oneself and the surroundings is inevitably related to homeland, mother tongue, culture, and traditions. Thus, OER in rarely used languages perform a more important role than it seems at first sight. It is not

only the element of the education system, stimulating the ability to use information technologies, create innovative teaching/learning methods, extend sharing of OER via the internet, but also encouraging one not to forget his/her language, culture, traditions, national identity. These aspects are especially important when designing teaching/learning methods, teaching material and tasks in one's language whereas free access to OER in rarely used languages allows teachers to share their experience, increase the possibilities of selecting created resources, make use of the existing variety and develop personal competences.

Possibilities of creating and developing OER in the Lithuanian language

Creation of OER in the Lithuanian language is not a rapid process. As it has been mentioned at the beginning of the article, it is determined by the adequate skill of using information technologies, lack of time, etc. If appropriate policy of using and developing OER in Lithuania is pursued, one of the solutions to the problem would be, first of all, organization of training sessions for creation of OER. It could also include seminars for explaining possibilities and benefit of applying OER in teaching/learning process as well as teachers' competences to apply innovative methods in the education process. In addition, hours spent on creating OER could be included into teachers' workload whereas seminars and courses should be free of charge. Promoting sharing of created OER and seeking free access to OER in the Lithuanian language, a database (or several of them) is a necessity so that created and stored material could be uploaded and shared among teachers not only from different schools of the city but schools of the whole country. Creation of the database would facilitate a search for certain material and allow teachers to discuss the provided OER. It all would enrich their experience, stimulate interest and develop creativity. Single OER announced on the internet do not create entirety of application. There is no consistency of the created material and, therefore, the current situation does not encourage teachers to be more deeply involved as OER search is becoming time-consuming occupation. Moreover, in Lithuania it is not very common for everybody to share the created product, announce it in public domains, so that other people could use it. Although Gudonienė et. al., (2013), on the basis of the conducted research, claim that even 80 % of teachers would agree to use the created products, it might be applied for the school only rather than all Lithuanian teachers. One must mention that OER database would help communicate and share material not only among teachers of the same subject but stimulate creation of integrated products. Such communication would improve teachers' qualification and allow applying innovative teaching methods. It would create a possibility to introduce the learning material in a

more interesting way, demonstrate interrelation between topics, etc. The database should be open not only for teachers but also for students and any dweller of Lithuania. Students could get acquainted with visual material of different lessons themselves, review the material of the lesson in order to revise the points that he/she did not master during the lesson. Such OER policy in Lithuania would allow expanding the network of these products rather than OER provided by single teachers. Funding is undoubtedly the most important factor. Everything that has been mentioned is supposed to have a financial basis because otherwise teachers should put a lot of efforts and time, unpaid work in order to implement outcomes of OER in Lithuania. Without funding one can hardly imagine appropriate representation and advertising of OER repositories. Thus, state position for this issue is very important as well. However, at present it is not performing a significant role. Numerous seminars and courses are organized as a part of certain projects. On the basis of teachers' experience, scientific works are developed. One of them is *LangOER*, directly related to OER in less used languages. Aims and objectives of this project are extremely relevant to OER creation in different languages by promoting a development of their open access as well as preservation of the native language.

Conclusions

On the basis of theoretical analysis, one can claim that there are not many scientific works concerning creation, application and development of OER in Lithuania in comparison with foreign countries. More and more scientific works are found in both Lithuania and overseas about IT application when creating OER. Their significance is based on emergence of the innovative teaching method – application of OER in the teaching/learning process.

Development of OER in Lithuanian and other rarely used languages is important when implementing objectives of the education system. For this reason, teachers' training to apply IT when developing course material and appropriate state policy are crucial. Creation of OER database and repositories as well as sharing of teaching material would facilitate the teaching/learning process.

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**EKONOMIKA UN
SABIEDRĪBAS PĀRVALDĪBA**
*ECONOMICS AND PUBLIC
ADMINISTRATION*

ANALYSIS AND DEVELOPMENT POSSIBILITIES OF BUSINESS INCUBATORS IN LATVIA

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Abstract. *The nature of business incubators and their historical development in the world and in Latvia, the role in the global and Latvia's economy, the requirements set by the Investment and Development Agency of Latvia (LIAA) for the operators and enterprises of business incubators within the framework of the activity "Business Incubators" (implemented within the project "Development of Business Incubators in Latvia" co-funded by the European Regional Development Fund), as well as the results achieved by the business incubators and enterprises, and their future perspectives are covered in the research. The aim of the study is to explore and analyse the implementation and performance of the LIAA's activity „Business incubators" in Latvia. The main issues analysed in the paper are the implementation conditions, the results, and analysis of the activity "Business Incubators" administered by the LIAA, as well as its effect upon the business activity in Latvia. Based on the obtained results, the authors conclude that the continuation of the business incubators' operation is a precondition for development of innovative business and growth of the economy of Latvia.*

Keywords: *business incubator, development, enterprises, growth, possibilities, services.*

Introduction

Business support instruments are mainly adjusted to the specifics of a particular region, though the basic principles are the same. Mostly, the support instruments are applied in the form of a state aid to enhance employment, exports, tax revenues, and overall development. One of the most common business support instruments is business incubators, which are primarily established to support new enterprises from their foundation until stabilization and ability to develop independently (Markus, 2010). The origins of business incubators in Latvia are quite recent, as it is in other Eastern and Central European countries, where the economies have relatively recently transferred to the conditions of market economy.

The insufficient number of viable, competitive, and economically active enterprises that enhance economic growth and provide a sufficient number of jobs could be marked as the main reason for establishing business incubators. In addition, Latvia is characterized by an uneven distribution of the economic

activity on a regional basis. However, facilitating the establishment of the start-up businesses seems to be an insufficient measure to guarantee sustainable development; to ensure increase in competitiveness, so that the newly established companies are viable. To help the new companies develop effectively, increase sales and, consequently, improve the well-being of the state, the Latvian Investment and Development Agency (hereinafter – LIAA) launched the activity „Business incubators” co-funded by the European Regional Development Fund (hereinafter – ERDF) in 2009. Basically, business incubators (hereinafter – BI) are structural units established to enhance the national and regional economic and social development.

The study aims to explore and analyse the implementation and performance of the LIAA’s activity „Business incubators” in Latvia.

The object of the research is the business incubators and their development possibilities. The following **methods** have been used in the research:

1. Monographic or descriptive method to characterise the nature of BI, the LIAA’s activity „Business incubators” co-funded by ERDF, and the BI future development perspectives in Latvia;
2. The method of statistical analysis to describe and analyse the process and the results of the LIAA’s activity „Business incubators” during the period 2009-2013.

Economic interpretation of the concept of business incubators

The formal concept of a BI originated in 1959, when Joseph Mancuso opened the industrial centre in Batavia, New York. The founder of the first incubator created a new structure under the circumstances of the post-war economy, when many manufacturing companies were closed, the economic restructuring had to take place, and unemployment increased. In the 1980s, the concept of BI was developed emphasizing the fact that the structures were established for a successful business start-up and initial development phase (Abeltina, 2008).

The researchers emphasize that insufficient business performance and development depend basically on a company's manager, his/her knowledge and abilities. Many businesses fail because they have a weak management with minor knowledge (Jennings et al., 1997). In research, the economists (Stonehous et al., 2007) point out that the company's competitiveness is one of the most important factors affecting the SMEs performance and growth. Experience of economic development worldwide has demonstrated that competitiveness is affected by many different factors. In the economic theory, the capital investments and infrastructure had been considered as key factors. In

latter stages, the economists believed that redirecting the resources to the „right” sectors and the „right” companies in the particular sector was the most important challenge. By development of the economic science, the researchers broadened the range of issues under consideration by a number of factors: human and social capital, progress of technologies and innovation, business relationship with environment, character of demand, diversification of products and markets, etc. Nowadays, the economists and entrepreneurs, altogether, support the opinion that all the factors affecting competitiveness are interrelated and, therefore, shall be evaluated in the overall context. The companies and the countries that have resources to achieve the necessary level of productivity have a competitive advantage (Kassalis, 2010). Lack of the resources impedes the innovation in the small and medium-sized companies; in addition, SMEs face a number of obstacles and more extensive uncertainty than the large enterprises. The research data point out that the level of innovation in SMEs depends on the company's financial and human resources (Wang et al., 1993). Whereas, Todtling and Kaufman (2001) indicate that these problems can be solved by integration of enterprises in networks, innovation systems, and by reliance on the external partners. In many SMEs, insufficient attention is paid to the staff training; some experts believe that the government should be involved in their education. The researchers have pointed out that the innovation raises the competitiveness, increases the number of jobs, and makes the region wealthier (McDonald et al., 2007).

The main function of a business incubator is to enhance the establishment of new companies offering up-to-date information on legislation and other topics, consulting on marketing, management, financial management, accounting, and other issues important for the entrepreneur's activity. For many years, the incubators have been joined into the networks. The networks are used to share the experiences and the best-practice examples, thus promoting new methods. In Europe, there is a well-established network – European Business Centre – which links together more than 250 business and innovation centres across Europe (Join us, 2015). In total, there are more than 9000 continuously operating incubators in the world. In Latvia, the BIs represent a relatively new instrument introduced by the assistance of the Ministry of Economics in 2007.

Characteristics, results, and analysis of activity „Business incubators” implemented by the LIAA

In Latvia, the activity “Business incubators” (the amendment of the Program „Entrepreneurship and Innovation”, Priority 2.3. „Improvement of Business Activity and Competitiveness”, Measure 2.3.2. „Business Infrastructure and Improvements to Equipment”, Activity 2.3.2.1. „Business

incubators” of the programming period 2007- 2013) was launched in two stages. The first stage took place from 2009 to summer 2014. In 2014, the new transition period tender for the BI operators was announced; the winners of the tender were able to provide the incubation services until 31 October 2015 (Initial Evaluation by the Ministry of Economics, 2015) with extension until 31 December 2015, thus ensuring the continuity of the business incubation services for the new entrepreneurs. In 2009, the contracts with the business incubator operators were signed at different times; hence, the duration of the contracts varied and, in 2014, provision of the incubation services was interrupted at different time of the year from April to October. Since in all cases, the services were provided for less than a year, the evaluation does not include assessment of the entrepreneurs’ 2014 annual reports. In 2015, the contracts were signed at different times; hence the evaluation does not include assessment of the businesses incubated in 2015, because at the time the evaluation was carried out, some of the BI still worked implementing the contracts (Initial Evaluation by the Ministry of Economics, 2015).

According to the legislation of the Republic of Latvia, the activity „Business incubators” was introduced with the aim to promote establishment and development of new, viable, and competitive businesses in Latvia’s regions, providing them with the necessary business environment and advisory services. The implementation of the activity was focused on the resolving of challenges of the unbalanced market development by stimulating the increase of number of enterprises and business activities in Latvia’s regions. It should be noted that the legislation reflected certain restriction which defined that the aid was not provided for the entrepreneurs of Riga city, Riga district, and Jurmala city. The most economically effective BI service providers were selected in accordance with the Public Procurement procedure – altogether 8 BI operators in Latvia.

The activity of BI in Latvia began its growth after the government allocated funds to support the BI – 2.28 million EUR in 2007 and the same amount in 2008. In 2007, 11 innovation centres and the BI projects received support of the Ministry of Economics (Markus, 2010). In order to enhance establishment and development of micro, small and medium-sized businesses, since 2009, the LIAA has implemented the project „Development of Business Incubators in Latvia” co-funded by ERDF. The total available public funds for the activity was 28.74 million EUR, including the 24.43 million EUR (85%) funding by the ERDF and 34.31 million EUR (15%) by the state budget. Support for the new businesses was allocated to last until 31 October 2014.

The data (Table 1) show that all the available funding was divided proportionally among the planning regions, providing 20% of the total amount to each planning region. Whereas, 10% of the available funding was allocated to the Riga planning region, except Riga city, Jurmala city, and Riga district, and

10% – to the creative industries BI in Riga. Assessing the share of the funding per inhabitant of the region, it is evident that, in the regions with less population, the funding is consequently bigger. The least amount of funding per inhabitant was received by the Latgale Planning Region – 17.80 EUR per inhabitant, which is 1.44 times less than the funding per inhabitant received by the Vidzeme Planning Region. The authors’ opinion is that the public funding was divided incorrectly by allocating the same amount of funding to all regions, regardless of the peculiarities and specific factors, such as the number of population in the region, unemployment rate, economic growth, business activity, availability of infrastructure, the number of students, and other, which certainly differ in each region.

Table 1 Funding available for the planning regions of Latvia to implement the activity “Business Incubators” at the initial stage in 2009 (by the authors)

Planning region	Available funding, EUR	Available funding, %	Number of population, beginning of 2009	Available funding, EUR per 1 inhabitant
Riga (except Riga city, Jurmala city, and Riga district)*	2 875 424	10%	-	-
Creative industries BI in Riga city*	2 875 424	10%	-	-
Vidzeme	5 750 849	20%	224 147	25.65
Latgale	5 750 849	20%	323 016	17.80
Zemgale	5 750 849	20%	267 725	21.49
Kurzeme	5 750 849	20%	285 968	20.11

*Due to the specific information, it is not possible to identify and calculate the number of population and the funding per inhabitant at the territory of Riga Planning Region and the territory of the creative industries BI.

Within the activity, until 31 December 2013, 493 companies had been ex-incubated. During this period of time, the Ministry of Economics discovered the tendency pointing out the increasing number of liquidated companies and companies under the insolvency procedures. Evaluating the enterprises from the moment the financial aid was received, it was identified that the funding had provided the necessary impetus to launch the economic activity.

Only enterprises that had submitted the annual report were evaluated as the operating enterprises. There is a detectable trend (See: Figure 1) that the public support allows 90% of companies to start up the economic activities and provides them an opportunity to stabilize in the business environment for the first two years, whereas the number of companies that are able to withstand the competition tends to decrease in the fourth year of operation. According to the

Initial Evaluation by the Ministry of Economics (2015), only 17% of the enterprises continued their economic activities five years after the moment the public support had been received.

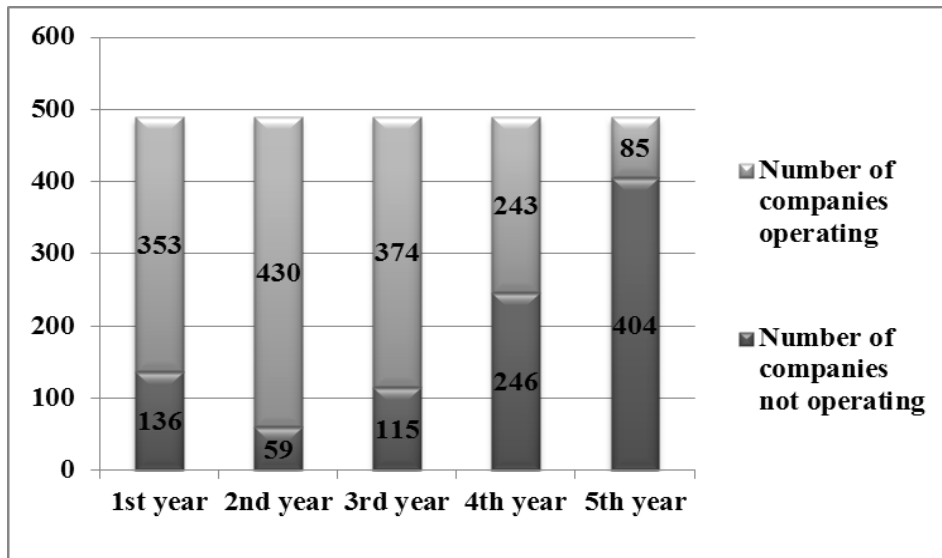


Figure 1 **Number of companies operating after ex-incubation**
(Initial Evaluation by the Ministry of Economics, 2015)

The number of employees of a company is one of the activity indicators to receive *de minimis* aid. Five years after the public support had been received, the economic activities were carried out by those companies that were able to grow, to find customers for the services/products, and to win the market share. The increased number of employees is also an evidence for the development of these companies (Figure 2).

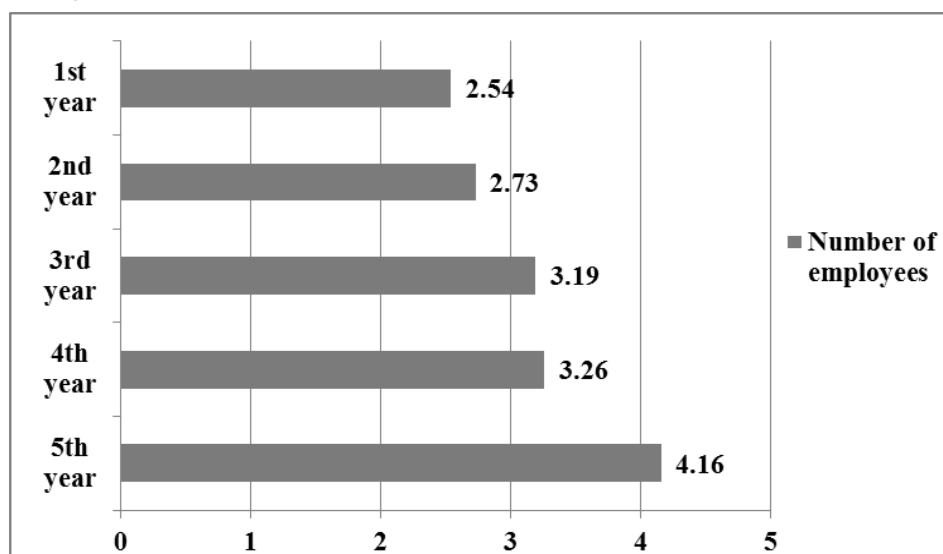


Figure 2 **Average number of employees in companies after ex-incubation**
(Initial Evaluation by the Ministry of Economics, 2015)

Data (Figure 2) suggest that, in the first year of development, the number of employees is 2.5 persons in average, whereas after five years the average number of employees increases to 4.2. That has to be assessed as a positive result, since of the number of jobs has increased.

Table 2 **BI performance indicators in planning regions, 2009-2013**

(compiled by the authors)

Planning region	Number of enterprises	Turnover, million EUR	Volume of exports, million EUR	Volume of taxes paid, million EUR	<i>de minimis</i> aid provided by BI, million EUR
Riga (except Riga city, Jurmala city, and Riga district)*	119	11.31	2.05	1.49	1.11
Creative industries BI in Riga city*	117	9.46	0.78	1.05	1.65
Vidzeme	212	15.08	4.43	1.71	2.82
Latgale	150	14.93	5.86	1.11	1.47
Zemgale	135	43.58	9.6	3.74	2.63
Kurzeme	225	45.18	8.08	5.09	3.76
TOTAL	958	139.54	30.8	14.19	13.44

The total number of the enterprises in the BI since the start of operations has reached 958 entrepreneurs (unprocessed data of the period 2014-2015 is not taken into account). Within all the period of BI operation, the largest number of businesses is marked in Kurzeme and Vidzeme planning regions. Each territory that is overseen by a particular BI operator has its own distinctiveness that influences both the number of companies at the BI, and business activity in general. These factors are, for instance, the proximity of universities and higher education establishments, industry traditions, infrastructure, geographic location, mentality of population. Assessment of the turnover and export indicators show the best statistics in Kurzeme and Zemgale regions, where, while funding the enterprises, a substantial emphasis was placed on the companies' ability to export their products and, thus, to expand their activities, to raise product awareness, to increase production volumes. Accordingly, these regions have also the best collected taxes indicators that correlate with the turnover values.

Opportunities for business incubators in Latvia in programming period 2014 - 2020

In the programming period 2007-2013, the incubators provided incubation services, administered granting the public support, and performed administrative functions. At the event „Regional business incubators and creative industries incubator” of the programming period 2014-2020, the LIAA took over the state aid functions. Further on, services to the incubated companies will be provided by the economic operators, including existing BI operators. The project applicant is the LIAA which, in accordance with a function specified in the regulations (to enhance establishment and development of businesses), will provide support to the enterprises and will promote regional cooperation. As a beneficiary, the LIAA with the local governments, businesses organizations, and regional universities will agree on the specific settings for the incubation support.

The support programme is envisaged to support all phases of incubation. The incubation support includes three phases:

- Pre-incubation – for individuals, newly-established businesses;
- Incubation support – for start-up entrepreneurs;
- After-incubation – for sustainable businesses that need business development, international cooperation, networking.

In order to enhance the impact of the measures of the programming period 2014-2020, there has been set a criterion, stipulating that the municipalities and BI have to establish a required relationship between the BI enterprise and the municipality. It can be specified by the municipality stating that all or part of BI enterprises have to perform their economic activities in the region, or they have to be legally registered in the region, or have any other agreed relationship with the region. This is a positive condition, which could enhance the self-employment potential in the region, create new jobs, and boost regional development. Consequently, the local self-governments are more interested in supporting entrepreneurship and implementation of its objectives in particular areas.

Achievement of certain indicators is possible in the regions and the countries with well-developed business experience. Analysing the results of the previous period, it can be concluded that the entrepreneurs had difficulties to maintain stable development indicators and to avoid the liquidation proceedings. In the next programming period, taking into account the experience obtained in the planning regions of Latvia, it would be useful to identify and to assess not only quantitative indicators, but also to evaluate each company's ability to provide and develop the following:

- to increase the number of employees, including the number of employees in the newly established enterprises;
- to provide a minimum salary and increase an average one;
- to increase turnover, export capacity, and profit;
- to consider taxability and increase volume of paid taxes (Initial Evaluation by the Ministry of Economics, 2015).

In the programming period 2014-2020, the support is focused on providing pre-incubation and incubation services for the entrepreneurs; though the biggest problem of the start-ups is the ability to raise funds for business or idea development. In addition to the necessary financial support, the new businesses need a competent consultative support. Taking into account the previous experience, the use of funding would be much more valuable if the emphasis was placed on creation of innovative products with added value rather than on the increase of the number of enterprises.

Conclusions

The business incubators (BI) are a relatively new instrument in Latvia that was launched in 2007 by implementing programmes for the development of innovation centres and business incubators. The insufficient number of viable, competitive and economically active enterprises that enhance the economic growth and provide a sufficient number of jobs could be mentioned as the main reason for establishing business incubators.

Currently, the BIs represent a kind of support to the entrepreneurs both in starting up business, expanding the company's operations, implementing innovation, and in commercializing innovation in the market. The main functions of BI are to enhance the establishment of new companies, offering the up-to-date information on legislation and other topics, consulting on marketing, management, financial management, accounting, and other issues important for the entrepreneur's activity.

In the previous programming period, the public funding was distributed equally among all planning regions, regardless of their peculiarities and specific factors, such as the number of population, the rate of unemployment, level of economic growth, business activity in general, accessibility of infrastructure, cooperation with universities, etc. The results of the programme implementation have pointed out significant differences between the regions. The best growth potential was demonstrated by the regions, where the incubated businesses had been selected evaluating their capacity for the export and possibilities to increase turnover. In the new programming period, it is envisaged to establish a stronger link between the local self-governments and business incubators. That should be evaluated as a positive aspect which would allow enhancing the self-

employment potential, creating new jobs, and developing business environment in the region. The use of the funding would be more effective if the emphasis was placed on the support to the companies which are able to create and develop innovative products with high added value rather than focusing on increasing the number of the companies which can sometimes be observed in practice.

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PROGNOSIS OF VISUALIZATION USAGE IN THE SCIENCE EDUCATION PROCESS

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Lithuania

Abstract. *Future education depends on many external exogenous factors - society evolution, technologic progress, teachers' opinion and their ability to organize the education process. Science education is difficult for many students but the progress of the society definitely correlated with achievements of science. This highlights the importance of teaching biology, chemistry, physics, geography and mathematics at school. Visualization helps students to learn science education but at the moment teachers are not likely to use computer based visualization. It is important to find out the predictions of the future – whether pedagogues are planning to use various kinds of visualization.*

The research results show more than half of teachers believe that physical visualisation in the next five years will be used similarly to now. The same situation was identified asking teachers about paper based visualization. On the contrary, application of the computer-based visualisation in near future is foreseen as the progressive phenomenon: internet sites, interactive boards will mostly increase in the next five years; also, knowledge of students will be more often inspected by aids of computer-based tests. It is planned that 3 D visual objects, experiments, schemes and modelling will be less used.

Keywords: *visualization, science education, teachers, prognosis.*

Introduction

In the near future education should guarantee high teaching equality for all, as education is the factor forming the society (Millar, 2012); this supposes the premise that from the epistemic perspective science education in future should be accessible to every learner, and therefore the educational sphere should be developed the way to form the best conditions for students with heterogeneous needs in the constantly developing world, where the educated person is to become the creator gradually.

It is planned that ICT application for the teacher and the student in future will be an important and interesting instrument to increase educational achievements (Courville, 2011; Kennedy, 2011; Guerra et al., 2011) and therefore will be widely integrated into the process of education (Belland, 2009; Trouche, Drijvers, 2010; Selwyn, 2012; Reigeluth, Merrill, 2009; Polly, etc., 2010); classical aids will be replaced by new ones (Tugui, 2011) by encouraging teachers to give more time for analysis of aids (Hicks, 2011). Computer technologies (especially visualisation) are not treated as the only ones that can

contribute to the improvement of the educational process – from the scientific and education perspective they are treated as culturally timely and favourable (Maddux, Johnson, 2011), contributing to learning but not transforming it basically (Sheehy, Bucknall, 2008), thus giving a sense to the student oriented paradigm (Smeureanu, Isaila, 2012) in reality.

Scientists state (Pence, McIntosh, 2011; Klieger, etc., 2010) that computer-based technologies in education would contribute to the creation of new educational environments, based on the domination of multidimensional and multimodal externalised visual artefacts. Their representation by innovative aids would contribute to the fulfilment of the life-long learning request (Lee, 2010), would possibly strengthen the role of the school (Robinson, 2012), because the education system has to be transformed so that it would be oriented towards the student, would enable the assurance of not only educationally but also socially valuable mastering of technologies (Facer, 2012).

Visualization can foster cognitive processes in difficult science disciplines (Билбокайте, 2013, Bilbokaite, 2015). It is especially actualised in spheres where learning about features of micro elements, not seen for the human eye, take place, without any special equipment and aids: misunderstood chemical links (Duis, 2011; Gomez-Zwiep, 2008; DiSpezio, 2010; Herman, etc., 2011), various processes (Klassen, 2009) and features of a phenomenon. It is important to find out teachers' opinion about their vision – how do they think and predict the usage of computer based visualization in near future. The findings would enclose constructions of social reality, which could be used to organize future education and to improve its' quality.

Object of the research – prognosis of visualization usage in the science education process.

The research aim is to enclose LITHUANIAN teachers' opinion about a prognostical assumption of visualization usage in the education process for Biology, Chemistry, Physics, Geography and Mathematics.

Methodology of research

Socio-economic situation. During last decade lots of Lithuanian schools got support from EU funds and improved their material basis. Mostly all teachers have possibility to use modern technical equipment and raise their working outcomes. But the technologies do not determine the usage of it in the educational process, because it needs time to change the culture of working experience.

Methods of the survey

There were used a questionnaire as an instrument and a survey as a data collection method. An analysis of data was done using *descriptive statistics: an*

index of popularity was applied to calculate ratings of variables; *analytical statistics*: Mann–Whitney U-test was applied for a comparison of variables from two independent samples; the test was applied to two independent samples with abnormal distributions of variables ($p < 0.05$). A hypothesis concerning the similarity of means of variables in the aspect of form and gender were verified by it (Bilbokaitė, 2015).

Research sample

The random independent sample was formed under the serial principle. The number of respondents was obtained under the formula of the sample calculation. The survey involved 1481 science teachers from Lithuania (teachers of Biology – N=300; teachers of Chemistry – N=252; teachers of Physics – N=287; teachers of Geography – N=275; teachers of Mathematics – N=366). More females than males participated in the survey – the number of teachers – males in each subject was lower by 23%. The distribution of teachers according to places of work was also non-homogenous – almost three thirds of the respondents worked in towns. As regards the working experience, the majority of the interviewed teachers had the working experience of 11-30 years; also 23% of the respondents had been working in schools for 30-40 years.

Teachers from all regions participated in the survey; the majority of them were from the biggest districts - Kaunas, Vilnius, Panevėžys and Šiauliai. Teachers of all qualification categories were questioned – over 80% of respondents had qualification of the senior teacher and methodologist. In order for the data to be more reliable, samples of the survey were joined to regions, according to districts, therefore the analysis of data was implemented under five regions.

Research instrument

There was used questionnaire as a research instrument. It had five scales and in this article only one is discussed – prognosis of visualization. Internal reliability of the instrument was high, it was appropriate to measure attitude of population of teachers towards the research object. The instrument was appropriate to reveal differences of attitudes of teachers of Biology, Chemistry, Physics, Geography and Mathematics / teachers according to generalised diagnostic blocks, their separate indicators according to categorised variables.

Results

The results are presented in figures and text below them.

More than half of the teachers believe that *physical visualisation in the next five years will be used similarly to now*, i.e. will not change. This attitude is supported by the teachers with all qualification categories. One statistically significant difference ($p = 0.011$) was identified, indicating that the teachers

with the working experience of 21-30 years are more convinced than their colleagues with the highest working experience about wider application of physical objects – prototypes in future.

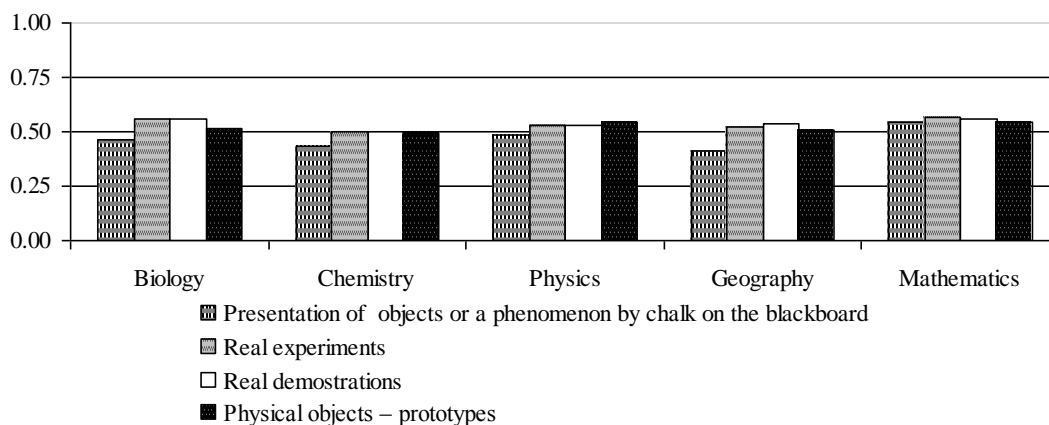


Figure 1 **Attitude of the teachers of different disciplines towards the change of application of physical visualisation after five years / IP (N = 1481)** (Author's calculations based on the data)

The teachers of Biology statistically significantly more than the teachers of Chemistry plan (Figure 1) that real experiments ($p = 0.005$) and real demonstrations ($p = 0.006$) with real materials will be wider used within the process of education. The teachers of Mathematics ($p < 0.05$) more than the teachers of other subjects support the wider presentation of objects or a phenomenon by chalk on the blackboard, more than the teachers of Chemistry ($p < 0.05$) plan the wider spread of real experiments and demonstrations as well as physical objects – prototypes. The application of the last aid in future is also supported by the teachers of Physics ($p = 0.028$) who more than the teachers of Geography expect the application of chalk upon presenting objects on the blackboard ($p = 0.007$).

The application of paper visualisation in the next five years is not likely to change (Figure 2): some aids will be used rarely; however, some of them will be applied more often. The application of paper posters in the educational process will increase the most; the second position – paper photos that will be more often used by three fourths of pedagogues. A higher educational value will be given to maps and drawings of students. The application of schemes, graphs and geometric shapes, presented on paper, will decrease.

The teachers with the working experience of 11-20 years statistically significantly more ($p < 0.05$) than pedagogues with the highest working experience believe that in the next five years the application of geometric shapes will increase. Educators with the qualification of a senior teacher more ($p < 0.05$) than methodologists think that the application of schemes, presented on paper will increase.

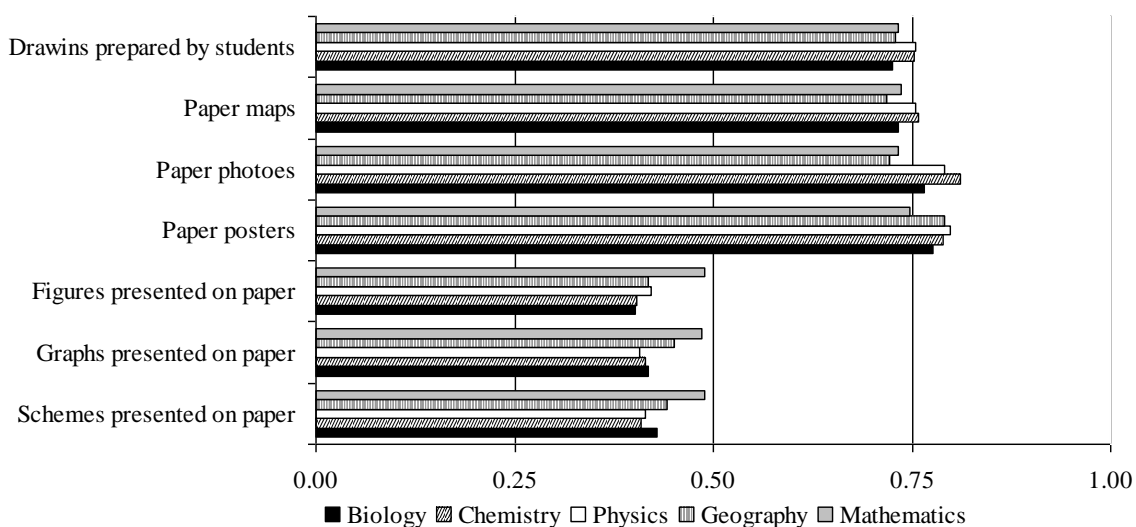


Figure 2 Attitude of the teachers towards the change of application of paper visualisation after five years (N=1481) (Author's calculations based on the data)

The teachers of Chemistry statistically significantly more ($p < 0.05$) than the teachers of Biology, Geography and the teachers of Biology more than the teachers of Geography and Mathematics plan that paper photos will be more widely applied in future. The teachers of Mathematics more ($p < 0.05$) than the teachers of Chemistry, Physics and Geography plan more intensive application of schemes and shapes presented on paper and more than the teachers of Biology, Chemistry and Physics – the application of graphs. The teachers of Mathematics less ($p < 0.05$) than teachers of Geography, Physics and Biology plan the application of paper posters, and less than the teachers of Biology, Chemistry and Physics – the application of photos. The teachers of Geography statistically significantly more than the teachers of Physics ($p = 0.048$) plan the application of represented graphs, while the teachers of Physics ($p = 0.000$) more than the teachers of Geography – the application of photos.

The teachers plan that the computer-based visualisation is likely to progress within the process of education (Figure 3). The majority of aids, representing this type of visualisation reach higher than an average index of popularity. According to the teachers, the application of internet sites, interactive boards will mostly increase in the next five years. Knowledge of students will be more often inspected by aids of computer-based tests. Lessons will be more often visualised by slides, educational commixes. The educational process will be diversified by visual computer games and animation. It is planned that 3 D visual objects, experiments, schemes and modelling will be less used.

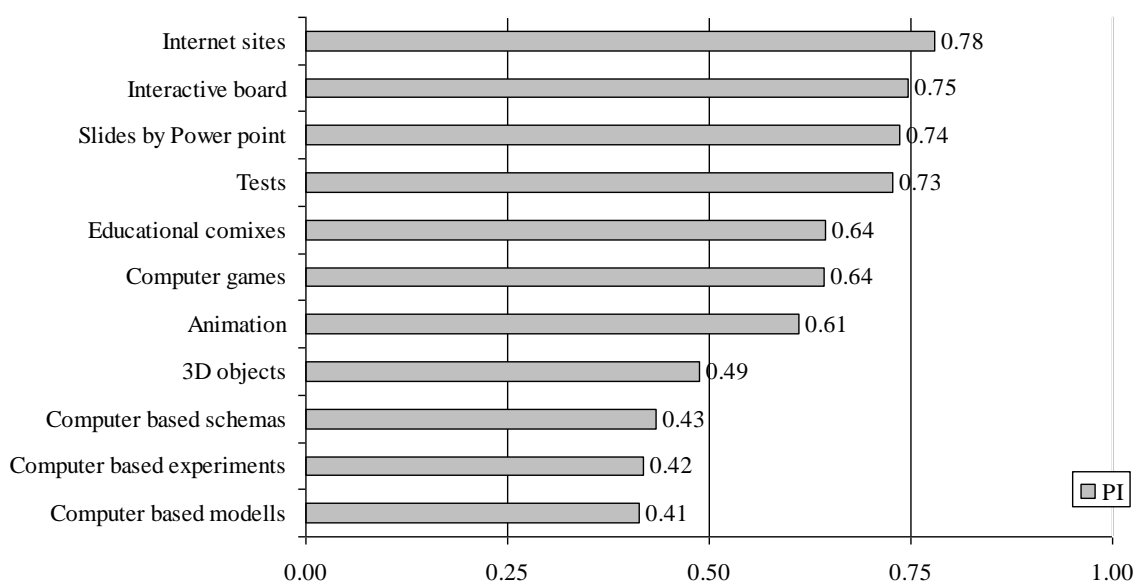


Figure 3 **Attitude of the teachers towards the change of application of computer-based visualisation after five years (N = 1481)** (Author's calculations based on the data)

The teachers with the greatest working experience statistically significantly more ($p < 0.05$) than their junior colleagues plan the higher popularity of tasks for inspection of knowledge, while the teachers with the working experience of 11-20 years more than those with the working experience of 21-30 or 31-40 years plan ($p < 0.05$) the application of the interactive board. However, the teachers with the great working experience less ($p < 0.05$) than the other groups of the respondents plan the application of computer-based schemes. The teachers with the working experience of 11-20 years statistically significantly more than the teachers with the working experience of 21-30 years believe that the application of computer games is likely to increase. The teachers with the working experience of 21-30 years more ($p < 0.05$) than their senior colleagues plan the educational benefit and popularity of educational commixes and animation among other aids of visualisation. The senior teachers statistically significantly more ($p < 0.05$) than the teachers methodologists plan the wider application of experiments, computer-based modelling, schemes and 3D objects during lessons.

It was defined that teachers of some disciplines support it more. The teachers of Geography statistically significantly more ($p < 0.05$) than the teachers of other subjects plan the application of computer-based schemes; more than the teachers of Biology, Physics and Mathematics ($p < 0.05$) – the application of computer-based schemes and tasks for the inspection of knowledge; more than the teachers of Physics ($p = 0.006$) – illustrations of experiments in the computer screen and more than the teachers of Mathematics ($p = 0.003$) – internet sites.

The teachers of Chemistry statistically significantly more ($p < 0.05$) than the teachers of Physics and Mathematics plan the popularity of videos, computer games and knowledge inspection tasks in the own subject, more than the teachers of Physics – the illustration of experiments in the computer screen ($p = 0.012$), more than the teachers of Mathematics ($p < 0.05$) – animation, the interactive board and tasks for the inspection of knowledge. The last two aids are planned the higher educational popularity by the teachers of Physics, statistically significantly more ($p < 0.05$) than by the teachers of Mathematics. The teachers of Chemistry in own disciplines expect higher ($p = 0.014$) application of tasks for knowledge inspection than the teachers of Biology. The teachers of Mathematics more ($p < 0.05$) than the teachers of Chemistry plan the wider application of 3D objects in future and more than the teachers of Physics believe that during the lessons of Mathematics illustrations of experiments, computer-based modelling and computer-based schemes will be more often ($p < 0.05$) applied in the next five years. During the lessons of Biology more than in lessons of Physics the illustration of experiments in the computer screen ($p = 0.001$) will be applied, more than during lessons of Mathematics ($p < 0.05$) – the application of the interactive board and internet sites. The teachers of Physics more ($p = 0.021$) than the teachers of Chemistry plan the higher popularity of animation during own disciplines in the next five years.

Conclusions

More than half of teachers believe that physical visualisation in the next five years will be used similarly to now. The same situation was identified asking the teachers about paper based visualization. On the contrary, application of the computer-based visualisation in near future is foreseen as a progressive phenomenon: internet sites, interactive boards will mostly increase in the next five years; also, knowledge of students will be more often inspected by aids of computer-based tests. It is planned that 3 D visual objects, experiments, schemes and modelling will be less used.

Teachers with the greatest working experience more than their junior colleagues plan the higher popularity of tasks for inspection of knowledge. Teachers with the working experience of 11-20 years are planning to use the interactive board. Teachers of Chemistry more than others plan that paper photos, videos, computer games will be more widely applied in future. Teachers of Geography more than others plan the application of computer-based schemes and tasks for the inspection of knowledge; Mathematicians more than Chemists plan the wider application of 3D objects in future.

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NECESSITY OF MAPPING AND ASSESSMENT OF ECOSYSTEMS AND THEIR SERVICES IN PLANNING AND DECISION MAKING PROCESS

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Abstract. *The EU Biodiversity Strategy to 2020 determines that “Member States, with the assistance of the Commission, will map and assess the state of ecosystems and their services in their national territory by 2014, assess the economic value of such services, and promote the integration of these values into accounting and reporting systems at EU and national level by 2020”. Mapping and assessment of ecosystem services provides several benefits, one of which is baseline data providing to measure net future gains or losses and data integration into spatial development process.*

The aim of the paper is to present and discuss the approach taken to assessing ecosystem services in order to introduce necessity of mapping and assessment of ecosystems and their services for planning and decision-making process in Latvia. The paper will focus on terminology interpretation of ecosystem services, introducing with set of developed indicators for assessment of ecosystem services and define appropriate for Latvia. The paper closes with estimation of potential benefits and necessity to integrate assessment of ecosystems services in spatial planning and decision-making process.

Keywords: *ecosystem services, ecosystem services assessment, land use planning and management, decision making.*

Introduction

Ecosystems as a research topic are relatively new. Only in year 1935 A.Tansley (Tansley, 1935) introduced the concept of the ecosystem. Since that time researches of ecosystems and their services in Europe have been rapidly developed (Seppelt et al., 2011).

Assessment of ecosystem services has been set a strategically important role at the European Union countries, including it to the EU Biodiversity Strategy to 2020. EU Biodiversity Strategy determines that “Member States, with the assistance of the Commission, will map and assess the state of ecosystems and their services in their national territory by 2014, assess the

economic value of such services, and promote the integration of these values into accounting and reporting systems at EU and national level by 2020” (EU, 2011).

The growing attention of science and practice to ecosystem services has led to an increased interest in both the public and private sectors for approaches to develop and apply ecosystem services indicators in real-world decision-making (Daily et al., 2009). Several decision support systems are evolving for integrating ecosystem approach into planning processes (Bagstad et al., 2013), i.e., interactive, computer-based tools, which help decision makers to visualize, compare, and consider trade-offs among many ecological, social, and economic values (Labiosa et al., 2013). Although a lot of these systems already provide helpful functionalities, they are not integrated into everyday decision-making yet, because they do not readily fit into existing planning processes (Bagstad et al., 2013).

In the context of Latvia the concept of ecosystems and their services and researches of ecosystem services are relatively new. Assessment of ecosystem services in Latvia was started within several EU supported projects, for example LIFE “Assessment of ecosystems and their services for nature biodiversity conservation and management” (EcosystemServices), LIFE “Integrated planning tool to ensure viability of grasslands” (LIFE Viva Grass), LIFE “Alternative use of biomass for maintenance of grassland biodiversity and ecosystem services” (LIFE Grasservice).

The paper focuses on ecosystems approach from decision making perspective. The paper addresses three research questions: (i) What is the background of ecosystem services assessment integration into decision making processes? (ii) How could ecosystems and their services can be estimated and assessed? (iii) How could ecosystem approach be integrated in decision making processes of land use planning and management? The first research question could be studied by revisiting and analysing the relevant EU policy strategies and scientific literature on ecosystem approach, ecosystem services assessment and their relation with decision making. The second research question is answered by analysing of case study for Latvian coastal ecosystems and applying expert method for identifying appropriate ecosystem services. For ecosystem approach integration into decision making processes the existing case studies has been analysed and conceptual framework model proposed.

The ecosystem approach and decision making processes in EU and Latvia

The concept of an ecosystem provides a valuable framework for analyzing and acting on the linkages between people and their environment. For that reason the Ecosystem Approach has been endorsed by the Convention on

Biological Diversity (CBD) and the Millennium Ecosystem Assessment (MA). The Ecosystem Approach is a strategy for the integrated management of land, water and living resources that promotes conservation and sustainable use in an equitable way.

The concept of ecosystem services has been defined as benefits people receive from ecosystems (MA, 2005). Ecosystem services are defined as goods and services provided by ecosystems which contribute to human well-being, ranging from provisioning (e.g., food, fresh water) and regulating (e.g., water, climate regulation) to cultural (e.g., recreational experiences) and supporting services (e.g., habitat for plant and animal species) (MA, 2005; de Groot et al., 2010).

Currently ecosystem services are studied much more closely in the context of man and his action, emphasizing that ecosystem services are related to human actions, decisions and investments (Burkhard et al., 2012).

In line with the Millennium Ecosystem assessment, the objective of the ecosystem services assessment is to provide a critical evaluation of the best available information for guiding decisions on complex public issues. The work being carried out is important for the advancement of biodiversity objectives, and also to inform development and implementation of related policies on water, climate, agriculture, forest, and regional planning. Robust, reliable and comparable data are also important for strategic and land use planning (MA, 2005). The assessment of ecosystem services can provide information to decision makers not only about the state and trends of ecosystem services (Fitter et al., 2010; Maes et al., 2012), but also identify spatial dependencies and trade-offs (Terrado et al., 2014).

Although several planning documents anticipate ecosystem services assessment in Latvia, such researches was only recently started. One of the priorities of the National Development Plan 2020 (Saeima of the Republic of Latvia, 2012) foresees a sustainable management of nature and cultural capital, respectively, maintaining the natural capital as a basis for sustainable economic growth, promoting sustainable ways of its use, and reducing the risks for the environmental quality caused by natural and anthropogenic factors. In Latvia in order to reach these goals it is provided to carry out the assessment of the natural capital till 2030 (provided in the section „Sustainable use of the natural values and services”) (Saeima of the Republic of Latvia, 2010). One of the projects to step towards reaching these strategic objectives is project LIFE EcosystemServices.

Case study: Ecosystems and their services assessment in coastal areas of Latvia

The case study of ecosystems and their services assessment in coastal areas of Latvia is related to EU supported project “LIFE EcosystemServices” started in 2014. One of a general objective of the project is to create a clearly comprehensive ecosystems services assessment system and to promote a new methodological approach for economic evaluation of the ecosystems and their services by information and communication of the long term benefits of the economically, environmentally and socially responsible decision making and lifestyle for the increase of the overall welfare in the region.

The approach of ecosystems and ecosystem services assessment for Latvia is approbated in two coastal pilot areas - Jaunķemeri and Saulkrasti (Figure 1).



Figure 1 Ecosystems and their services assessment pilot areas. At the left side pilot area Jaunķemeri and at the right side Saulkrasti (author's construction developed within the project LIFE “EcosystemServices”)

The pilot area “Jaunķemeri” is located within the city and is a part of Kemeris national park. It includes sandy beach and biologically valuable habitat of EU importance – wooden dunes. The area is not much transformed and relatively poorly visited (90,85 ha). The pilot area “Saulkrasti” is located in Saulkrasti municipality. It includes sandy beach and biologically valuable habitat of EU importance – wooden dunes and remarkable cultural and nature monument – White Dune. The well maintained nature object is frequently visited and subjected to excessive anthropogenic pressure and erosion (132,86 ha).

The ecosystem services identification and classification is based on the Common International Classification of Ecosystem Services (CICES). To develop matrix of indicators of ecosystem services assessment for the pilot territories, expert knowledge based ecosystems services assessment method was used. Expert knowledge based ecosystem services assessment is an effective tool not only for ecosystems valuation but also to improve cooperation between scientists, experts, stakeholders and decision makers (Jacobs, 2015).

The group of experts, who developed ecosystem services matrix, consisted of 16 experts of different fields – including Geographic Information System Specialist, Public and Target group Specialist, Environmental Specialist Cultural Heritage Specialist, Architect/Landscape Expert, Hydrology Expert, Geological Expert, Species and Habitat Conservation Expert.

Ecosystem services categories, groups and classes are specified in the ecosystem services matrix (Table 1).

Table 1 Indicators of ecosystem services (author's construction based on the expert data gained within the project LIFE “EcosystemServices”)

Category	Department	Group	Class
Providing services	Food & Beverages	Biomass	Wild plants, algae and their outputs
			Wild fish
	Materials	Biomass	Fibres and other materials from plants, algae and animals for direct use or processing
			Materials from plants, algae and animals for agricultural use
			Medicinal resources
	Energy	Biomass-based energy source	Plant based resources
Mechanical energy		Sources of Abiotic energy: wind; sea waves	
Regulating services	Mediation of waste, toxics and other nuisances	Mediation by ecosystems	Filtration/sequestration/storage/accumulation by ecosystems
			Dilution by atmosphere, freshwater and marine ecosystems
			Mediation of smell/noise/visual impacts
	Mediation of flows	Mass flows	Mass stabilisation and control of erosion rates provision of the erosion
			Buffering and attenuation of mass flows
		Liquid flows	Hydrological cycle and water flow maintenance
			Flood protection
Gaseous / air flows	Storm protection		

Category	Department	Group	Class	
	Maintenance of physical, chemical, biological conditions	Lifecycle maintenance, habitat and gene pool protection	Pollination and seed dispersal	
		Pest and disease control	Maintaining nursery populations and habitats	
			Pest control	
		Disease / invasive species control	Soil formation and composition	Decomposition and fixing processes
				Chemical condition of freshwaters
		Water conditions	Atmospheric composition and climate regulation	Global climate regulation by reduction of greenhouse gas concentrations
				Micro and regional climate regulation
		Cultural services	Physical and intellectual interactions with biota, ecosystems, and land- /seascapes	Physical and experiential interactions
Physical use of land-/seascapes in different environmental settings				
Intellectual and representative interactions	Educational			
	Heritage, cultural			
	Entertainment			
Aesthetic	Spiritual, symbolic and other interactions with biota, ecosystems, and land-/seascapes		Spiritual and/or emblematic	Symbolic

As the whole 3 ecosystems (dunes, woodlands, rivers), 40 ecosystem services provides by these ecosystems and 10 land cover types are identified in the pilot areas. Based on this classification the certain indicators for each service can be developed and common assessment by applying ecosystem matrix method (prepared by authors and experts within project LIFE “EcosystemServices”) can be implemented.

By ecosystems services assessment in coastal areas it is possible to put forward the long-term requirements for the sustainable use and maintenance of the resources, different biotopes and their required areas, evaluating which ecosystems need protection and conservation, which require more intense maintenance, and which – restoration.

Bringing Ecosystem approach into decision making in land use planning and management

Ecosystems services assessments can be an attractive tool for supporting decisions on land use because they can highlight benefits and trade-offs between different land-use options, ideally by integrating biophysical and socioeconomic methods (Förster et al., 2015). Therefore, ecosystems services assessments are increasingly used in decision-oriented processes, including environmental impact assessments and land-use planning for biodiversity conservation and catchment management (Förster et al., 2015). However, it is now widely recognized that nature conservation and conservation management strategies do not necessarily pose a trade-off between the “environment” and “development” but that investments in conservation, restoration and sustainable ecosystem use generate substantial ecological, social and economic benefits (de Groot et al., 2010). On the other hand, there are alarming findings, for example, that the destruction of nature has now reached levels where serious social and economic costs are being felt and will be felt at an accelerating pace if we continue with ‘business as usual’ (TEEB, 2010). Therefore a stronger integration of the ecosystem services concept in spatial plans could help reduce such costs and promote the generation of benefits which, traditionally, has not been considered in spatial plans.

In Latvia such practice has not been introduced yet, although in other countries the application of assessment of ecosystems and their services is widely common, and the decision making process based on the evaluation results performed on municipal, as well as national level. This results in the negative impact on the environment, caused by the lack of management strategies and evaluation approaches, particularly in areas with increased anthropogenic load. Regarding the regional and municipal spatial planning tendencies, these natural territories often fail as opposed to the commercial and business considerations. In order to explain the importance of the natural capital to the decision makers, entrepreneurs and general public, it is essential to assess both non-monetary (ecological, social, cultural) and monetary values of the ecosystems that would allow the comparison of the natural values against the socio-economic needs.

The authors of the article propose the conceptual framework for ecosystem approach integration into decision making consisting of 7 steps, which could be implemented by different national, regional and local institutions at different levels (Figure 2).

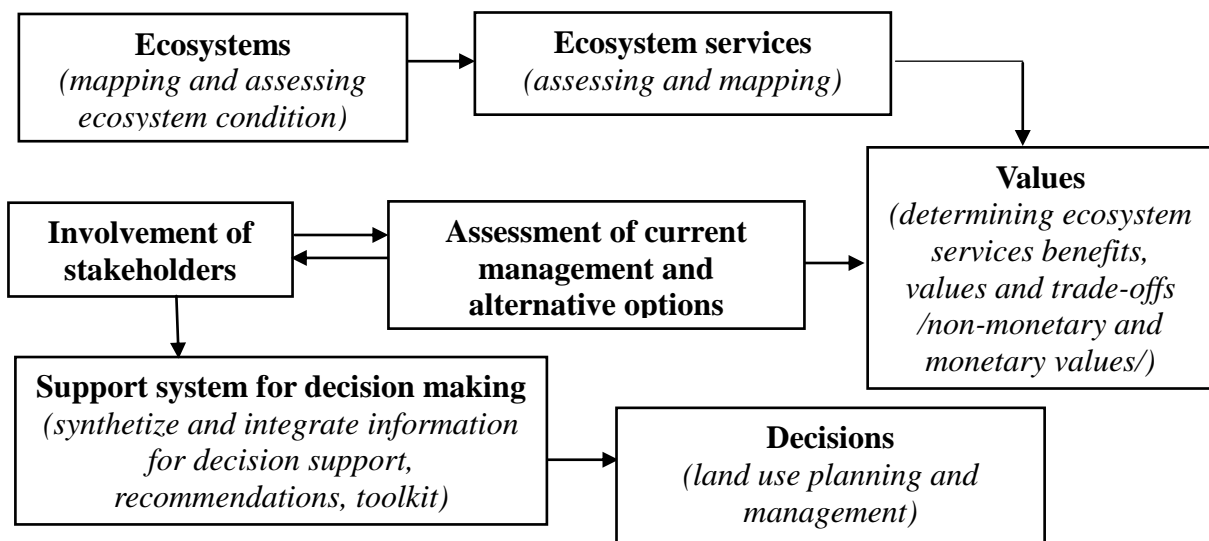


Figure 2 **A framework for ecosystem approach integration into decision making (author's construction)**

Mapping of ecosystems includes data identification for ecosystem mapping. Mapping of ecosystems is largely dependent on the availability of land-cover/land-use datasets at various spatial resolutions. The most comprehensive dataset for terrestrial and freshwater ecosystems at EU level is Corine Land Cover (CLC). *Assessing of the condition of ecosystems* includes review of data and indicators for ecosystem assessment. It should make use of existing data, mainly the reported data under EU legislation and, in particular, from assessments under Art. 17 of the Habitats Directive and Art. 12 of the Birds Directive, the Water Framework Directive, the Marine Strategy Framework Directive and other environmental legislation.

To perform *ecosystem services assessment*, it is necessary to classify ecosystem services. Three international classification systems are available to classify ecosystem services - Millennium Ecosystem Assessment (MA), Common International Classification of Ecosystem Services (CICES) and The Economics of Ecosystems and Biodiversity (TEEB). Developed ecosystem classification systems are similar and include three primary ecosystem services – providing, regulating and cultural services. Assessment can be implemented by ecosystem services matrix method by involvement of experts, comparing and analysing different indicators and applications of economic valuation methods. Cost–benefit analyses and other methodologies express apples-to-oranges comparisons in monetary currencies, making alternative options easier to compare.

Assessment provides *values or beneficial outcomes* (ecological, social and economical values of ecosystem services) which plays the most important role

in decision making in land use planning and management.

Assessment of current management and alternative options. Identifying policies and management options requires understanding of the current land-use policies and practices within their socioeconomic and cultural context (Cowling et al., 2008; Ostrom, 2009; Chan et al., 2012). Within ecological limits, landscapes offer a range of potential land-use options and configurations. Social, cultural, and economic processes influence and determine ecosystem services potential, with power relations, property and access rights, investments of time, labour, and resources.

Involvement of stakeholders. Collaboration of scientists, decision makers, public and private stakeholders is the key to transform landscape patterns into more sustainable ones (Healey, 2007; Scholz, 2011). This promotes both engagement of relevant stakeholders and building of trust between stakeholder groups. Trust among stakeholders is important for sharing knowledge, but also for acknowledging relevant knowledge gaps. This includes, for example, local knowledge on diversifying crop production as means of building resilience to droughts and pests. The process of stakeholder involvement is both directed – for supporting decision makings and also for reviewing and evaluating of current management and alternative options.

Support system for decision making. Basing on information obtained and assessments performed a support system for decision making should be developed which introduces new methodological approach for the planning and management of the territories by introducing ecosystem approach, which would be based in the socio-economic aspects and their potential development.

Decision making. All previously described steps result in decision making to maintain ecosystems and their services by managing the system sustainably.

Conclusions

Using a broad interpretation, in which ecosystem services benefits are based on multiple values, the ecosystem services concept can be valuable for decision support: it allows assessing human dependence on ecosystems through inter- and transdisciplinary research, integrating perspectives and values of different stakeholder groups, and guiding decisions on resource use (Förster et al., 2015).

Decision makers do not necessarily need an exhaustive understanding of the social-ecological system, but they need sufficient arguments to make a choice between land-use options. There is important to provide the framework for improvements for the strategic planning documents (Spatial Development Plans and Nature Conservation Plans) and to promote the understanding of the

various stakeholder groups on the topics of sustainable planning for the enhancement of common benefits.

Although a lot of decision support systems already provide helpful functionalities, they are not integrated into everyday decision-making yet, mainly because they do not readily fit into planning processes in practice. Guidelines or recommendations for conducting such processes are still missing. Here, we are planning contribute to the development of such recommendations by means of practical case studies of the pilot areas. The focus is placed on how integration of ecosystem services assessment can be integrated into land use decision making process and practice basing on the conceptual framework presented above.

The presented framework stresses the need to: (a) identify and assess ecosystems and their services; (b) information needs by decision makers from the outset of the assessment process, and (b) focus on decision making basing on relevant ecosystem services assessment values and support system

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EDUCATIONAL TOURISM IN THE TRAINING OF FUTURE TOURISM PROFESSIONALS

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***Abstract.** The concept of educational tour (field trip) and the importance and role of educational tours in the training of future tourism professionals are explored and analysed in the paper. The concept of educational tourism is formulated and the types of field trips are identified in the result of the research. A sociological survey with the aim to find out opinions of tourism students on the necessity, preferable types, and duration of field trips was conducted as well.*

Research methods: the logical construction method, scientific induction, synthesis, the monographic method, methods of quantitative and qualitative analysis for processing the survey results.

***Keywords:** educational tourism, professional competence, field trips.*

Introduction

Nowadays, particular attention is focused on the development of professional competence both in the process of student education and staff professional activities, since the mastery and competence are the key elements for efficient operations as well as the instruments (not only the results) to achieve a deeper understanding. However, the transformation of the economic life related to the industry reforms determines the need for employee qualities that have been under-demanded in the labour market before: liability, interest, and initiative. The specifics of the tourism industry, which is related to delivering services and providing security for tourists, establishes increasing requirements for the staff qualification. Key elements of the personnel competence is a set including knowledge, skills, abilities, behavioural stereotypes, efforts, and communication techniques. Professional competences may be developed during a field trip, which is a part of the educational tourism (Procter, 2012; Wong & Wong, 2009).

The pace of the development of knowledge, techniques, and technologies determines the changes in the content, direction, and nature of professional activities. New requirements for the employee qualification level demand to search for new approaches for the evaluation of qualifications. The above

mentioned brings the up-to-date competence-based approach in the vocational education system (Aleksandrou & Field, 2005; Wichard & Hans, 2015). It involves a new ideology, which interprets the educational content deriving from the result.

Contemporary innovative processes in science and education lead to the dynamic development of pedagogical theory and practice. Some educational technologies that have been successfully used in the past, such as educational tourism, are still up-to-date, since they are based on the fundamental, not-outdated educational and upbringing principles. Educational tourism is commonly used in various educational systems – in Russia and the UK – by the specialists of sectoral pedagogy (Zholobova, 2006; Belyaeva, 2007; Bhuiyan et al., 2010), and is estimated to be a highly effective teaching technology and, at the same time, a way of organizing the study process.

Within a wide range of the issues related to the formation process of the professional competence of tourism specialists, **the issues** related to the use of educational tourism activities in the study process justified by Procter L., Wong A. and Wong S., Pogodina V. and others (Procter, 2012; Wong&Wong, 2009; Pogodina, 2009) **are raised** in this research.

The research hypothesis is based on an assumption that, under the circumstances of modernization of tourism vocational education, professionally relevant competences are formed using the advantage of educational tourism.

The research aims to investigate and determine the role of and the need for educational tourism in the training of future tourism professionals.

The research methods: the logical construction method, scientific induction, synthesis, the monographic method, methods of quantitative and qualitative analysis.

Theoretical aspects of educational tourism

The method using journeys (trips) with the educational purpose has been established in pedagogical science a long time ago. However, the common approach to the concept „educational tourism” is still not established in Latvia. Also, the problem of how to make the optimum use of the method in order to build the professional competence of students is present, and the topic is scarcely reflected in the scientific pedagogical literature. Thus, it can be concluded that the concept „educational tourism” is relatively new, so it has to be defined, its content should be outlined, and the classification structure should be specified by developing criteria for its efficient use in the training of tourism specialists in line with the needs of the labour market. The nature and role of educational tourism in the world are studied by Rodger (Rodger, 1998), Paul and Trent (Paul & Trent, 1999) and others.

In Latvia, field trips can be used at all levels of the education system: secondary education, vocational education, higher education, and lifelong learning.

In the academic literature, educational tourism is regarded as a phenomenon of the integration of education and tourism by organizing tourism as an educational activity to achieve the objectives and meet the targets determined by the curriculum. It is focused on the formation and development of significant qualities of an individual that are expressed as universal, general professional, and specialized competences (Chen et al., 2008; Hoffman, 1999; McLegan, 1997). A description of the educational tourism concept in different sources is provided in Table 1.

Table 1 **Definition of educational tours (field trips) (authors' construction)**

Source	Definition of a field trip
British Dictionary (2012)	An expedition, as by a group of students or research workers, to study something at first-hand.
American Heritage Dictionary of the English Language (2011)	A group excursion for the purpose of first-hand observation, as to a museum, the woods, or a historic place.
Collins English Dictionary (2014)	An expedition, as by a group of students or research workers, to study something at first-hand
Random House Kernerman Webster's College Dictionary (2010)	1. A school trip to gain first-hand knowledge away from the classroom. 2. A trip by a researcher to gather data first-hand, as to a geological, archaeological, or other site.
Cambridge Dictionaries Online (2016)	A visit made by students to study something away from their school or college.
Dictionary of Unfamiliar Words by Diagram Group (2008)	An excursion by staff and students to study at first-hand something of interest or relevance to a course.

Educational tourism has its roots in the ancient world. Yet, depending on the socio-economic, political, cultural, and historical circumstances, at different historical stages of its development, it had its own peculiarities. In Europe, the tradition of international journeys with educational purposes arose in the 9th century due to the increasing number of universities. Starting from the 12th century, the academic and student exchanges had already a persistent tendency to evolve. Affected by the ideas of the great Enlightenment thinkers (J.Lock, J.J.Ruso et al.), at the end of the 17th century and in the first half of the 18th century, several European educational institutions practiced the excursions and expeditions for their students. From the middle of the 19th century, the establishment and specialization of the new types of higher education institutions in Europe and America had a positive impact on the dynamics of the

international student mobility. From the middle of the 19th century, the leading pedagogues of Russia were the promoters and organizers of educational tourism. Among them, renowned geographers N.A. Golovkinskij, D.N. Anuchin, V.I. Vernadskij, and others shall be mentioned (Pogodina, 2009).

As pointed out by William (William, 2010), the pedagogical and didactic base for the development of the educational tourism concept lies in the sectoral (tourism) pedagogy, which is defined as a science about the laws of education and upbringing of an individual by using tourism instruments. Educational tourism is one of the most important concepts of tourism pedagogy. By its functional nature, it represents a form of educational process organization, which is implemented outside the educational institution. An integrative phenomenon of educational tourism occurs in the result of combination and mutual interaction of educational and tourism activities (Figure 1).

Field of activities						
Structure of activities	Tourism		Educational tourism		Education	
Activity	Tourism activities		Educational tourism activities		Educational activities	
Subject of activity	Tourist	Tourism organizer	Educational tourism organizer	Student	Student	Teacher
Means and conditions	Final purpose. Potential of tourism resources		Potential of educational tourism. Real objects and environment		Pseudo-real objects and environment	
	Natural	Cultural and historic	Natural	Cultural	Content of education	Environment of education
Needs or demands to be met	<ul style="list-style-type: none"> • Recreation • Cognition • Communication 		<ul style="list-style-type: none"> • Psycho-physical • Emotional • Social • Intellectual • Creative 		<ul style="list-style-type: none"> • Learning • Projects • Games • Research • Communication 	
Implementation of activity	Travel Individual or in group		Educational tour Individual or in group		In-class and out-of-class Individual or in group	
Result of activity	Satisfaction of tourists' needs		Forming universal, professional and specialised competences		Satisfaction of students' needs	

Figure 1 **Integrated operational model for the concept “educational tourism”**
(adapted by the authors, based on Pogodina, 2009)

Educational tourism is focused on a number of students' basic needs: physiological, psycho-physical, emotional expressions, social, needs for a change, self-actualization needs, intellectual development, the exploration and development of creative potential (Abubakar et al., 2014). All of them should be considered when designing field trips or professional tours.

Professional tours are an amply widespread type of tourism when a student-tourist (a future tourism and service professional) participates in a trip that is arranged within the framework of a professional study course. For instance, during the trip organized within the course “Hotel Organization and Management”, students get familiar with hotel quality evaluation criteria, equipment, reservation systems, management and operations of other service departments; within the course “Catering Services” – they get acquainted with

catering service quality evaluation criteria, etc. Thus, the students combine studies with their leisure; in addition, they have a chance to not just see and experience service technologies but as well to test them as potential employees at the specific workplace and to improve their competences.

Tourism is inseparable from the cognitive process (Millan, 1995; Moscardo, 2016), which allows to satisfy students' interest in new facts, fascinating phenomena, craving for the positive emotional experience related with the acquisition of new information. The purpose of a journey has to be considered as the most important element of the tourism operational system determining the demand components, grounds for the choice and the content of the journey. Particularly, during cognitive field trips, tourists (students) can be offered the opportunity to acquire some study courses.

Prolific experience on the educational efficiency of trips, tours, and expeditions is accumulated by the pedagogues of Russia (Pogodina, 2009; Zholobova, 2006; Vaganova, 2004), Turkey (Arslanturk&Altunoz, 2012), the United Kingdom (Jacobson et al., 2009).

Types of educational field trips

Currently, the most important direction of intercultural exchange is presented by international relations in the field of education, especially in higher education. The student community is traditionally distinguished by mobility and communicability, craving for the change of the place, travelling and continuous search for new knowledge and information. Therefore, international educational contacts shall be considered as some of the most prospective aspects of humanitarian cooperation developing dynamically, since the modern international education practice presumes that the entire education or a part of it is obtained abroad. The activation of student, master student, doctoral student and teacher exchange takes place due to progress in science and technologies and in the process of European and global integration. The international tourism trends and nature of its development in the sector of higher, vocational, and secondary education are impacted by the operations of international nature. Currently, one of the most popular programmes designed for university students is *ERASMUS+* adopted within the framework of European integration. Participation in the programme allows students to improve their knowledge of foreign languages, to develop communication competencies, to raise the level of their individual independence, altogether forming the students' socio-cultural experiences, promoting their socialization.

The analysis of various educational tours existing in the tourism market or being used in the study process has led to the classification of the field trips (Table 2). The exploration of the recent offer, content, and specificity of the

field trips allow to identify the main types of educational tourism. Those are: science-profile field trips (landscape, ornithology, ecology, geology, etc.), cultural and historic heritage tours (archaeology, ethnic, military patriotic, religious cognitive, pilgrimage, etc.), foreign language study tours, sports-training tours, etc. The diversity of types and methods used for the organization of field trips allow introducing new ideas, improve the tourism product production process and expand the range of educational and tourism services.

Characteristics of educational tourism as an innovative form for the organization of studies have to be based on the fundamental changes in defining the contemporary educational objectives, principles, and approaches.

Table 2 Criteria and types of field trips (authors' construction)

<i>Criteria for classification</i>	<i>Types of field trips</i>
1. Category of participants	Schoolchildren
	Students
	Professionals
2. Purpose	Developing universal competences
	Developing general professional competences
	Developing special professional competences
3. Theme	All-inclusive
	Environment sciences
	Humanitarian
	Social and economic
	Technical
	Professional
4. Number of participants	Individual
	Groups
5. Method of organization	Individual
	Organized
6. Didactic targets	General pedagogic
	Subject-focused
	Interdisciplinary
7. Orientation to personality structure	Informative
	Operational
	Emotional and moral
	Heuristic
8. Organization of activities	Passive
	Dialogue
	Problem solving
	Creative
	Virtual

9. Area (territory)	Local
	Regional
	International
10. Market of field trips	Language study tours
	Sports study tours
	Professional study tours

In January 2016, the authors conducted a pilot survey among the students of the study programme „Entrepreneurship” with specialization „Tourism business manager” and the bachelor programme „Hospitality Management” at the Rezekne Academy of Technologies with the aim to find out the students' opinion and the demand regarding the necessity of field trips to improve the process of studies. Particularly, the students were asked about the types, preferable duration, and the price of the field trips they would like to take. Thirty two students were surveyed during the research.

Two (7%) of 32 students answered that they were not interested in the field trips, indicating the following reasons: lack of time due to the work, sport training activities, possibly high costs, and poor knowledge of foreign languages. Other 30 students affirmed that the field trips were necessary and they would like to take part. The field trip classification criteria and classification of educational tourism markets were used to identify what were the most, the least and the average demanded field trips (Figure 2).

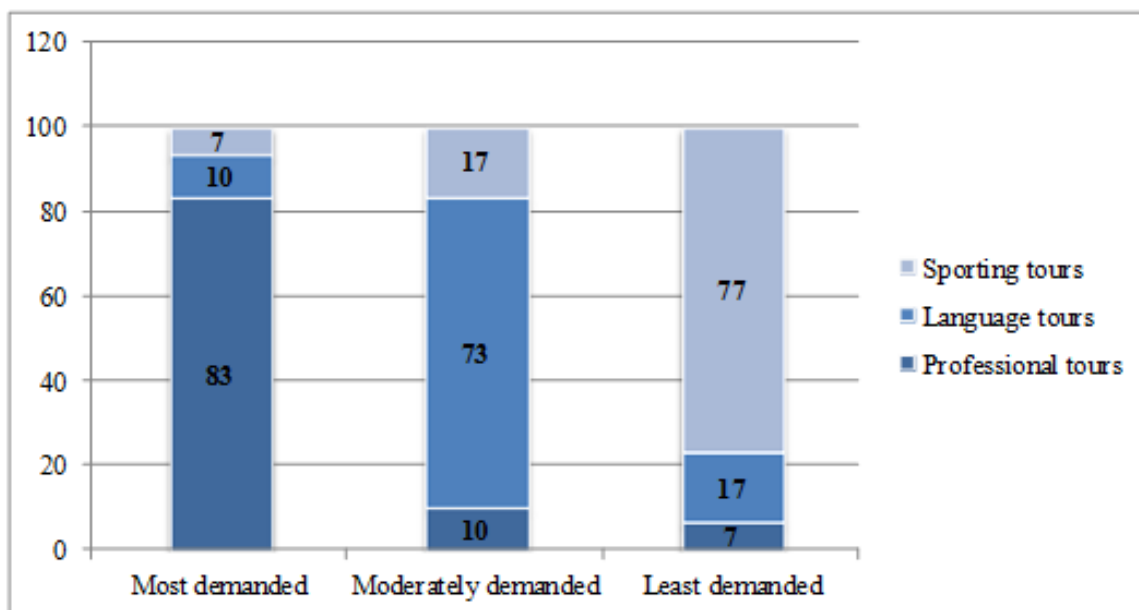


Figure 2 Demand for the field trips, % (authors' construction)

The results of the survey demonstrate that sporting tours are not popular among the students, still, they are chosen, too, especially by those in favour of doing sports. The top named sport tours would include football, volleyball, basketball, floorball, orienteering, and tennis.

The students interested in business language, negotiation management, as well as the students interested in international tourism are appealed to the educational tours offering foreign language studies. Most of the respondents would like to study English in the United Kingdom or the United States, as well as the world's most common languages: French language – in France, Italian – in Italy, German – in Germany, Spanish – in Spain, Japanese – in Japan.

The highest is the demand for professional tours.

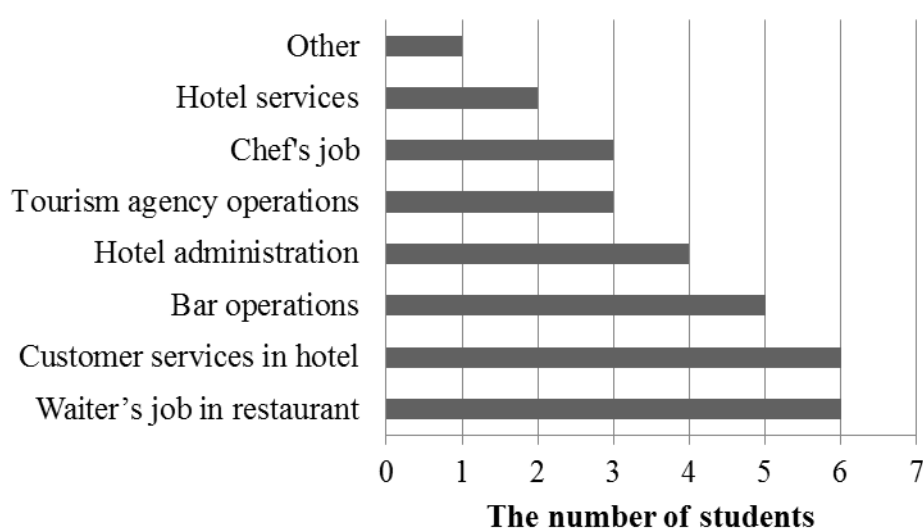


Figure 3 **Demand for the professional tours (authors' construction)**

As shown in Figure 3, the most students would like to have further training in hotel and restaurant operations.

All the respondents would be interested to receive additional services during the field trip: excursions, a swimming pool, a sauna, massage, bars, discos, meetings, festivals, contests, which are the additional services traditionally offered by tourism companies in the hospitality industry.

The duration of field trips, as pointed out by the students, could be from 1 week up to 6 months, and the respondents would be likely to pay from EUR 50 to 500, depending on the duration of the tour.

The acquisition of special theoretical knowledge in the field of tourism and service is the basis for developing the professional grounds, though the students' practical skills are mainly formed during the field trips. (Zholobova, 2006)

Field trips as a particularly effective form of learning can be used in the study programmes designed for the training of tourism professionals (for example, the second-level professional higher education bachelor study

programme „Entrepreneurship” with specialization „Tourism business manager” and the bachelor study programme „Hospitality Management” at the Rezekne Academy of Technologies).

Summary

The educational tourism concept in the scientific literature is regarded as a phenomenon of education and tourism integration by organizing tourism as an educational activity to achieve the objectives and meet the targets determined by the curriculum that is focused on the formation and development of significant qualities of an individual that are presented in a form of universal, general professional, and specialized competences (Chen et al., 2008; Hoffman, 1999; McLegan, 1997).

An analysis of the educational tours currently offered in the tourism market or being used in the study process has led to the classification of the field trips (Table 2). The exploration of the recent offer, content, and specificity of the field trips has allowed to identify the main types of the educational tours.

The research study has revealed that the highest demand is for professional study tours. Most of the students would like to have further training in hotel and restaurant operations.

The duration of field trips, as pointed out by the students, could be from 1 week up to 6 months, and the respondents would be likely to pay from EUR 50 to 500, depending on the duration of the tour.

The results of the survey demonstrate that sports tours are not popular among the students, nevertheless they are being chosen, too, especially by those in favour of doing sports. The top named sports are football, volleyball, basketball, floorball, orienteering, and tennis. Within language tours, the students would like to learn English in the United Kingdom or the United States.

Field trips as a particularly effective form of learning can be used in the study programmes designed to train tourism professionals (for example, the second-level professional higher education bachelor study programme „Entrepreneurship” with specialization „Tourism business manager” and the bachelor study programme „Hospitality Management” at the Rezekne Academy of Technologies).

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ATTRACTING FOREIGN DIRECT INVESTMENTS: THE CASE OF LATGALE REGION

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Abstract. *Recent theoretical and empirical studies show that foreign direct investment (FDI) is crucial for sustainable development of countries and regions. The various discussions among the regional development institutions in Latvia on the importance of improving the environment for successful attraction of foreign investments have been initiated, as well as new strategic initiatives are in the process of development. The aim of the paper is to analyse the latest trends of inward FDI flows in Latvia and Latgale region in the context of global FDI trends. To attain the aim, the global FDI trends, the inward FDI flows in Latvia and Latgale region, as well strategic framework of Latgale region for attracting FDI were analysed.*

Keywords: *foreign direct investment, inward FDI, strategic planning.*

Introduction

Recent theoretical and empirical studies show that foreign direct investment (FDI) is crucial for sustainable development of countries and regions. Over the last decade, it has grown rapidly as a key form of capital transfer across national borders. More than one third of the world's trade today are in the form of intra-firm transactions, which is the trade between the different parts of the same corporation across the borders. FDI and the operations of multinational enterprises have become essential to the world's economy in general. However, the effect of the global economic crisis and geopolitical situation continues to shape investment flows and to influence policy initiatives.

FDI brings new products and services into the host economy, generating demand for these products. First, the new products lead to creation of new markets and entrepreneurial opportunities (horizontal effects). Second, new firms may seek to exploit niche opportunities within sectors neglected by foreign-owned firms. FDI secures support for trade flows, boosts export competitiveness and stimulates import- competing production. Finally, the FDI can help new firms extend their activities by subcontracting or by developing collaborations for different activities (vertical effects) (Albulescu & Tamasila, 2013).

The world FDI market is highly competitive. All countries, regions, cities compete for FDI. Besides, this competition is quite similar in terms of a national legal investment framework and in addition, many countries have complemented and enhanced their regulatory frameworks with international investment agreements. Therefore, the challenge for countries is to develop and strengthen a reputation for being an excellent place for foreign investors.

The aim of the research is to analyse the latest trends of inward FDI flows in Latvia and Latgale region in the context of global FDI trends. Several tasks have been set within the framework of the research:

- to describe the global FDI trends in 2014;
- to analyse inward FDI flows in Latvia and Latgale region, as well strategic framework of Latgale region for attracting FDI.

The logic analysis and synthesis methods, monographic and analytical methods of research, descriptive statistical methods were applied to accomplish the tasks.

Trends in global foreign direct investment

The global economy is still developing in an uneven way and overall global growth in 2014 reached 3.3% compared to 2013. Global economic development trends last year were determined by several global events – geopolitical instability in Ukraine and the Middle East, low economic growth in the euro area, as well as the sharp fall in oil prices in late 2014. Overall, global growth is slowly accelerating, but the growth rate is not as strong as expected. Economic growth of the EU in 2014 reached 1.3%. Although still low, this growth rate is a step forward in comparison with previous years, when the EU GDP in 2012 dropped by 0.5% and in 2013 remained stable (UNCTAD, 2015).

FDI inflows show the most rapid decrease in the last 10 years in developed countries. FDI inflows fell by 16 per cent to 1.23 trillion dollars in 2014, mostly because of the unstable global economy, policy uncertainty for investors and high geopolitical risks. Inward FDI flows to developing economies reached their highest level at 681 billion USD dollars with a 2 per cent rise. Among the highest 10 FDI recipients in the world, 5 are the developing economies and China became the world's largest recipient of FDI. Among the developing countries, the performance of Asia, Latin America and the Caribbean, and Africa was uneven in 2014 (AIM, 2015). Nine out of 20 largest investor countries were from developing or transition economies.

Finally, the economies in transition saw a dramatic fall in FDI inflows in 2014, minus 51 per cent, to 45 million euro. Russia accounted for the greatest

share of the decline, in light of the conflict surrounding Ukraine and the sanctions imposed on Russia in response. (AIM, 2015)

Key global FDI tendencies: (1) Western Europe was the leading source region; (2) India, Vietnam, Japan and Malaysia were four of the fastest growing destination countries; (3) inward investment into the region consisting of Russia, the Commonwealth of Independent States, and Central, Eastern and South-eastern Europe declined by 24%; (4) FDI into Europe by project numbers fell by nearly 17% in 2014, in contrast to near 7% growth in FDI in North America; (5) FDI into Russia declined by 39% and the top five biggest investors in Russia were all Chinese Companies; (6) FDI into Ukraine was hit hard, with 80% declining capital investment and 64% decline in FDI projects. (FDI, 2015)

Despite the economic downturn in the world and Europe, *EY's attractiveness survey - Europe 2015* (EY's, 2015) concludes that Europe in 2014 comparing with 2013 faced increase in FDI of 36 %. Share of Europe in total amount of the world increased from 17 % in 2013 till 24 % in 2014. (UNCTAD, 2015) The leading countries according to the FDI projects were the United Kingdom (887 projects, 11 % increase) and Germany (763 projects, 9 % increase). In 2014, countries in Central and Eastern Europe overtook their Western counterparts to secure the greatest number of FDI jobs. Eastern countries attracted much bigger projects than Western peers, but national trends vary. The Baltic States - Estonia, Latvia and Lithuania –have strong links to Scandinavia, and together attracted a total of 101 FDI projects in 2014.

Software projects continue to lead service-sector inflows, which are dominated by US investors (40%). High costs in Western European capitals and a drive to set up regional European hubs helped CEE countries whose affordable, but able, talent pools attracted more than twice as many projects and jobs as in 2013 (57 projects and 11,825 jobs). (EY's, 2015)

According to the results of *EY's attractiveness survey - Europe 2015* of those interviewed 85% believe that Europe will return to sustainable economic growth. Only slightly more than a half of them (54%) believe sustainable growth will return in less than five years. 59 % of investors believe that Europe will become more attractive in the next three years. Business leaders believe high value-added sectors, such as ICT, pharmaceuticals and clean tech will be the future vectors of investment and growth in Europe. The digital transformation is clearly driving massive economic and social change in Europe. ICT is attracting massive investments; software is already the number one sector for FDI projects in Europe. Investing in markets of the future: ICT (31%) and pharma-biotech (25%). Investors believe that these sectors will drive Europe's growth. Bureaucracy is seen as the biggest threat to Europe's attractiveness (20% of investors), outweighing slow growth.

Foreign direct investment in Latvia

After several years of strong economic growth, when the Latvian economy grew by 4- 5% per annum between 2011 and 2013, in 2014 Latvian GDP growth rates slowed down, demonstrating 2.4% growth. Economic growth became slower due to various internal and external factors, among which the most important is the escalation of the geopolitical situation, introduction of trade sanctions and the Russian economic recession. Despite the economic slowdown, Latvian GDP growth last year was one of the highest among EU Member States and by 1.1 percentage points above the EU average growth rate. Analysis of GDP from the expenditure side shows that, overall, in 2014 there was an increase in all components, but growth was mainly ensured by domestic consumption. (LR FM, 2025)

The stock inflow of FDI increased and reached the highest level in 2014 (14,57 million dollars) after Latvia's membership of the European Union in 2004 (see Table 1). Unfortunately, in 2014 investment activity remained weak - Latvia received FDI in amount of 474 million dollars, which is less than the amount received from 2011. It is also three times less than the amount received in 2008 (1262 million dollars). However, in mid – 2014, a number of international rating agencies – Standard & Poor's, Moody's Investors Service and Fitch Ratings – once again raised Latvia's national credit rating and for the first time since the crisis it reached the above average risk level A. In the medium term it is a positive signal to foreign investors. (LR FM, 2025)

Table 1 Dynamics of foreign direct investments in Latvia, 2010 - 2014 (million dollars)
(UNCTAD, 2015)

Foreign Direct Investment	2010	2011	2012	2013	2014
Inflows	380	1466	1109	903	474
Outflows	19	62	192	411	137
Value of announced greenfield FDI projects	702	606	1002	729	262

Historically, most of Latvia's FDI inflow has come from neighbouring countries in the Baltic Sea region and other EU member states. According to the statistical data of the Bank of Latvia, the largest amounts of investment in 2014 were from the European Union countries - 4672 million euro or 39 % of the total FDI stock in Latvia's economy, including from Sweden – 2511 million euro or 21 % of the total FDI stock in Latvia's economy.

Overall, however, Latvia's FDI inflows cover a range of economic sectors. According to the statistical data of the Bank of Latvia, FDI division by sectors

displays that greatest FDI was attracted by financial intermediation - FDI in real estate operations was 13.10 %, in manufacturing – 12.05 % and in wholesale and retail trade – 10.25 % of the total FDI stock.

However, the growth of FDI by sectors is not homogeneous. FDI in the manufacturing sector grew by 21.2%, in transport and storage sector rose by 12.2%, while FDI in the wholesale and retail trade sector grew by 29.7%. At the same time, the slowdown in investment was registered in electricity, gas and heating sector by 19.4 and in the agricultural sector by 18.4% compared to 2013.

According to the statistical data of territorial development planning information system (TAPIS) on the regional development indicators of Latvia, the most successful regions in attracting foreign direct investments in the last five years were Riga region (1.756 million euro in 2014) and Kurzeme region (0.107 million euro in 2014) (see table 2).

Unfortunately, in 2014 investment activity in Latvia’s regions was weak. Only two regions - Zemgale and Kurzeme regions increased the total amount of FDI.

Table 2 Foreign direct investments by regions in Latvia (million euro) (TAPIS)

Planning regions	2010	2011	2012	2013	2014
Riga region	0.395	1.347	0.101	7.965	1.756
Vidzeme region	0.016	0.083	0.033	0.034	0.016
Zemgale region	0.002	0.018	0.002	0.014	0.058
Latgale region	0.01	0.016	0.001	0.041	0.032
Kurzeme region	0.1	0.146	0.096	0.032	0.107

The greatest amount of FDI in 2014 was attracted by Riga region – 89 % of the total amount of FDI in Latvian regions.

Foreign direct investment in Latgale region

The cities are the most attractive places for FDI attraction in Latgale region. City of Daugavpils had the largest amount of inflow FDI (33, 37 million euro in 2014). The second largest amount of FDI belonged to Rezekne city (5,2 million EUR) followed by Krāslava county (4,1 million EUR). 9 out of 11 most attractive places for FDI inflows in Latgale region were cities of national importance (Rezekne and Daugavpils), as well as regional development centres like Krāslava, Līvāni, Balvi, Ludza, Preiļi. Rural areas had very low FDI inflows. In Ilūkste county the major part of FDI was composed of a single investment project in the company “LatRosTrans”, placing it in a top position (see table 3).

**Table 3 Foreign direct investment in municipalities of Latgale Region 1994- 2014
(LPR INPP, 2014)**

County/City	FDI 1994-2004, EUR	FDI 2004-2014, EUR	FDI, total, EUR
Daugavpils City	46506964.53	-13138358.97	33368605.56
Ilūkste	52011656.17	-20170446.98	31841209.19
Rēzekne City	1546024.21	3624120.13	5170144.34
Krāslava	360141.75	3762005.14	4122146.89
Līvāni	2457322.38	278245.36	2735567.74
Rēzekne County	299874.50	2149258.95	2449133.45
Balvi	29773.59	1520671.48	1550445.07
Ludza	11286.22	1126236.32	1137522.54
Daugavpils County	310548.89	519307.07	829855.96
Dagda	3414.89	404091.84	407506.73
Preiļi	275012.66	-6858.24	268154.42
Viļāni	159589.30	31977.81	191567.11
Baltinava	0.00	32726.05	32726.05
Rugāji	0.00	19877.56	19877.56
Viļaka	0.00	10045.47	10045.47
Kārsava	428995.85	-419747.18	9248.67
Cibla	4560.30	1131.19	5691.49
Vārkava	5051.19	640.30	5691.49
Riebiņi	0.00	4516.32	4516.32
Zilupe	7825.80	-3365.93	4459.87
Aglona	0.00	1421.45	1421.45

The biggest amount of FDI in Latgale region was invested in the enterprises in Daugavpils and Rēzekne (see table 4).

This trend emphasizes the weight of urban areas in investment attraction. The sectorial composition of FDI in Latgale region (1994- 2004) was the following: land transport and transport through pipelines – 40.57 %, manufacture of other transport equipment – 13.27 % manufacture of chemicals and chemical products – 6.88 %, wholesale trade – 5.21 %, manufacture of wood and product of wood and cork – 5.02 %, civil engineering – 3.94 %, real estate activities – 3.26 %, manufacture of machinery and equipment – 3.08 % e.g. (LPR INPP, 2015)

Table 4 FDI in Latgale region by investors (2014) (Lursoft, 2015)

No	Investor	Location/ Enterprise	Industry	FDI (euro)
1	AK „TRANSNEFTE PRODUKT”, OAO (Russian Federation)	Ilūkste county, LatRosTrans, SIA	Pipeline transport	9348823
2	Skinest Rail AS (Estonia)	Daugavpils, Daugavpils Lokomotīvu Remonta Rūpnīca, A/S	Manufacture of other transport equipment	5 664 242
		SIA „DLRR Wood”	Manufacture of wood and of products of wood and cork	
3	Nexis Fibers a.s. (Slovak Republic)	Daugavpils, Nexis Fibers, SIA	Manufacture of chemicals and chemical products	5340524
4	Panevežio Keliai, Akcine bendrove (Lithuania)	Daugavpils, Latgales Ceļdaris, SIA	Civil engineering	3 086 920
5	Spacecom AS (Estonia)	Daugavpils, Daugavpils Lokomotīvu Remonta Rūpnīca, A/S	Manufacture of other transport equipment	2 982 339
6	DAN LET NATIONAL 21 ApS (Denmark)	Krāslava county, DEN LAT International 21, SIA	Real estate activities	3301062
7	OU Lokomotīvu Investēringuud (Estonia)	Daugavpils, Daugavpils Lokomotīvu Remonta Rūpnīca, A/S	Manufacture of other transport equipment	1 813 906
8	CLEAR ENERGY HOLDINGS S.A. (Luxembourg)	Rēzekne, NewFuels, RSEZ SIA	Manufacture of wood and of products of wood and cork	1779841
9	CLEAR ENERGY HOLDINGS S.A. (Luxembourg)	Rēzekne, Atmos clear CHP RSEZ SIA	Manufacture of wood and of products of wood and cork	1778762
10	C.I.G Capital Invest Gaz Ltd (Cyprus)	Daugavpils, INTERGAZ, SIA	Wholesale trade	1 406 764
11	Martin Ziegler GmbH and Co. KG (Germany)	Daugavpils, ZIEGLERA MAŠINBŪVE, SIA	Manufacture of machinery and equipment n.e.c.	1 196 902,00

The biggest amount of FDI inflows were invested and the greatest number of FDI projects were implemented in Latgale region by investors from Russia – 43% from the total amount of FDI and 307 FDI projects in 2014. Investors from Estonia, Germany, Switzerland and Lithuania composed more than 34% of FDI in Latgale region with 217 projects (see table 5).

Table 5 **FDI projects in Latgale region by countries (2014)**

No	Country	FDI (euro)	Number of projects
1	Russian Federation	38548210,9	307
2	Estonia	8959256	44
3	Germany	4425090,72	46
4	Confederation of Switzerland	3841688	9
5	Lithuania	2855695,106	118

Source, Lursoft, 2014

However, the largest amount of FDI per investor were from the European countries (Luxembourg, Switzerland, Estonia, Cyprus and Denmark). Investors from these countries invest in larger projects, while investors from CIS countries and Lithuania on average invest in many small-scale projects.

Strategic framework of Latgale region for attracting FDI

The most important issue is the locational FDI determinant. Among these, the most important are economic factors, in particular the size and growth of the market, the appropriate quality of the infrastructure, including transport and logistics infrastructure, and the diversity and quality of labour force, as well as science and technology resources and research and innovation capacity. The entrepreneurs' satisfaction with business environment in Latgale region is most closely correlated with the access to the local market, competitive real estate prices and provision and quality of technical infrastructure (Ežmale & Litavniece, 2011). The situation reflecting that these basic economic determinants have been developed in many countries explains high competition between countries and regions to attract FDI. Policy creators and planners at different administrative levels adopt decisions on the distribution of economic activities in a space and the political and strategic framework influence on decisions for the investment allocation.

Strategy for Investment Attraction to Urban Areas in LV-LT Cross-Border Region (Investment Attraction Strategy) describes the main strategic priorities for attracting FDI to Latgale–Ignalina region. The Investment Attraction Strategy outlined the lack of investment attraction activities, lack of skilled

labour force, macroeconomic barriers and location of a region as the weaknesses of the Latgale– Ignalina region. At the same time Latvia Investment and Development Agency and Rezekne Special Economic Zone Authority delineated that Latvia and Latgale region have advantageous geographic location between the EU and CIS countries and direct access to more than 500 million consumers of the European Union. Important is the fact that Daugavpils University and Rezekne Academy of Technologies in Latgale region have high quality study programmes with modern study and research infrastructure to improve knowledge and skills of labour force in relation to the engineering sciences, like ICT, mechatronics, electronic commerce, environmental engineering e.g. (LPR INPP, 2014)

The Investment Attraction Strategy (LPR INPP, 2014) defined that the goal is to become one of the leading regions in Latvia in foreign direct investment attraction to manufacturing industries by year 2021. To achieve the objective, four priorities have been set:

- 1) priority “Developing Industrial Parks for Fast and Low Cost Manufacturing Setup”;
- 2) priority “Building Competences to Support Industry Clusters”, includes measures aimed at improving accessibility of skilled labour force in Latgale-Ignalina region by creating cluster–supporting competence network;
- 3) priority “Running Pro–Active Investment Marketing by Strengthening Regional Institutions” is aimed at tackling the challenge of insufficient mass of investors by creating departments at regional institutions working directly with investment marketing and investor attraction;
- 4) priority “Fast Logistical Connections” includes actions for developing transport infrastructure and setting up logistical parks by the EU external border.

The sectorial distribution of FDI can be a significant factor that determines the influence of FDI on a capital formation process. When the sectorial distribution of FDI is substantially different from the distribution of the existing capital stock or production, the contribution of FDI to capital formation will be more positive than when the distribution of FDI follows roughly the existing sectorial distribution of the capital stock. In other words, the relationship between FDI and domestic investment is likely to be complementary when investment is in an undeveloped sector of the economy (Titarenko, 2006). Therefore, the primary aim is to find the new incentives for FDI inflow in the less developed industrial sectors of Latgale region where the foreign investors will contribute to new technologies, introduce new products and stimulate higher activity of domestic firms ensuring the investment effect.

For Latgale region there is a defined specialisation in manufacturing of machinery, transport equipment, textile and wearing apparel, food production, manufacture of wood products. These sectors are traditional and strong in Latgale region. One of the most promising sectors for FDI in previous years was the communications' sector. These sectors globally represent an increase of 82.2% on the 2012 spending and the highest capital investment figure for the communications' sector since such data in 2003. The high value-added sectors, such as ICT, pharmaceuticals and clean tech will be the future vectors of investment and growth in Europe. Therefore, it will be important to set Latgale region additional specialisation for attracting FDI in the sectors which are less developed at the moment, but at the same time most perspective, like ICT, logistics and transportation, clean tech.

Conclusion

Recent theoretical and empirical studies show that foreign direct investment is crucial for sustainable development of countries and regions. FDI provides capital inflows that have positive impact on finance current account deficit and facilitates compensation of the insufficient capital formation of the local enterprises. Furthermore, FDI stimulate the transfer of technology that cannot be achieved only through trade of goods and services, as well as financial investments. FDI can also encourage competitiveness of domestic trough improvement of knowledge and managerial skills. It means that FDI can serve as an important complement to domestic investment in building productive capacity to advance growth and development, but to be successful in attracting FDI, the right factors have to be improved.

FDI can serve as an important complement to domestic investment in building productive capacity to advance growth and development. FDI is a tool for that purpose. But to be successful in attracting such investment, the proper FDI determinants need to be in place.

Most important preconditions for FDI are the following:

- reduced cost of compliance and production;
- competitive locational advantages (reliable infrastructure, utilities, transportation networks and logistics e.g.)
- flexibility in terms of resource allocation (labour, capital, equipment e.g);
- productive, skilled labour force.

It could be concluded that through elaboration of strategic documents, Latgale region should pay greater attention to the above mentioned aspects. It would convince potential investors that the regional and local authorities take all

necessary measures to improve the business climate and increase competitiveness in the territory. By providing measures to increase the investment attractiveness in strategic documents, it would create favorable conditions for FDI attractiveness improvement in the future. It is important also to find new incentives for FDI inflow in the less developed industrial sectors of Latgale region where the foreign investors can contribute to new technologies, introduce new products and stimulate higher activity of domestic firms ensuring the investment effect.

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EVALUATION OF A LOCAL GOVERNMENT DEVELOPMENT PLANNING: THE CASE OF LATGALE

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Abstract. *Spatial planning is a practical and useful instrument introduced by the European Community and national governments throughout the last decade with the aim to promote development of regions and reach territorial cohesion. In order to assess interconnections between quality of spatial planning documents of local governments of Latgale region and territorial development indicators the following tasks were performed: to describe the methodology for evaluation the quality of spatial planning documents, to describe the results of interconnections between quality of spatial planning documents in local governments of the region and development indicators.*

Keywords: *regional development, spatial planning, spatial plan, development programme.*

Introduction

Spatial planning is a practical and useful instrument introduced by the European Community and national governments throughout the last decade with the aim to promote development of regions and reach territorial cohesion.

The spatial planning has been regarded in different ways; however, to principal approaches can be clearly distinguished:

- 1) as a system for management of spatial development and the physical use of land in a particular territory;
- 2) as a specific term to characterize a special spatial planning definition regarded as a co – ordination mechanism that has emerged in the result of discussions at the European level. (Dühr, Colomb & Nadin, 2010)

The possibilities of spatial planning are related with its inter-disciplinary nature embracing the social and the economical fields, as well as cultural and environmental dimensions determining development trends of a region. The spatial planning has a great impact on territorial development.

The Latgale region considers itself in many ways as being a pioneer in regional development and planning in Latvia (Alden, Paalzow & Ežmale). At the same time the region has the dubious distinction of being not only poorest Region in Latvia, but also one of the poorest in EU. Towns and cities is an important driving force of development of the entire state. At a concentrated level, they offer working places and lodging, which is supplemented by public

and private services, as well as transport services and communications linking parts of towns and cities and ensure connection with other populated areas. Therefore, national and regional importance development centres according Latvia long-term development strategy 2035 was selected for present research, such as Daugavpils, Rēzekne, Balvi, Krāslava, Līvāni, Ludza, Preiļi.

The objective of paper is to assess interconnections between quality of spatial planning documents of local governments of Latgale region and territorial development indicators. The following tasks were established:

- to describe the methodology and results of evaluation the quality of spatial planning documents (development programmes, spatial plans and common spatial planning documents) of selected local governments of Latgale region;
- to describe results on interconnections between quality of spatial planning in local governments and development indicators thereof, as well as the recent development tendencies of selected local governments of Latgale region.

Methods of the research for fulfilling the objectives of the article are following: logic analysis and synthesis methods, monographic and analytical methods of research of theoretical and empirical sources, descriptive statistical methods and correlation analysis method, indicators measurement and correlation analysis methods were applied.

Key- Elements of good practice of Spatial Planning

Many theoretical researches characterize the “good practice” of spatial planning documents by analysing the key-elements for elaboration of a high-quality, effective and successful planning document. Therefore, it is important to analyse the most important criteria suggested in theoretical researches characterising compliance of spatial planning documents with the “good practice” of spatial planning. By summarizing conclusions, it can be concluded that the key-elements characterizing compliance of spatial planning documents with the “good practice” of spatial planning are as follows: (1) aims and objectives of a planning documents, planning horizon and status; (2) vertical and horizontal co-ordination; (3) integrated approach characterised by spatial, thematic and temporal strategy; (4) participation and awareness of the society; (5) strategic dimension or vision, aims and strategy; (6) an appropriate status and style of a document. (see Table 1).

There is a range of elements, observance of which is substantial for elaboration of a high-quality spatial planning document, and these elements are as follows: (1) the institutional, economic, environmental and social context; (2)

a clear vision, aims and values, as well as a clear strategy for introduction of the latter; (3) the involvement a broad target groups during the entire process of document elaboration; (4) a well-considered and appropriate information and communication strategy aimed at target groups; (5) the relation with other field policy documents, as well as compatible with planning documents of a higher level; (6) a clear introduction mechanism to introduce resources, as well as to establish a simple though effective framework for monitoring activities. (Ežmale, 2012)

Table 1 Key-Elements of “Good Practice” of Spatial Planning and their Reflection in Planning Theory (Ežmale, 2012)

Key-elements of good practice	Examples of concepts in theoretical researches	Authors
Horizontal and vertical co-ordination has been ensured, planning principles have been established	Horizontal co-ordination; vertical co-ordination; governance; governance landscape; planning principles	Forinos (2004); Aldens (2006); Adams & Harris (2006); Böhme (2002); Böhme & Waterhout (2008); Healey (2009); Scheers (2006); Forinos (2004)
Integrated approach (field, spatial, a.o.)	Thematic co-ordination; spatial co-ordination; balance between the economic, social and environmental fields; planning in time; integrated planning; temporal dimension (continuities of past, present and future)	Nijkamp & Pett (1989); Myers & Kitsuse (2000); Adams (2006); Adams & Harris (2005); Alden (2006); Healey, Khakee, Motte & Needham (1997); Alexander (1998, 2000); Lichfield (1998, 2001a); Olivera (2010); Madanipour (2010)
Involvement of target groups of the society and information thereof has been organized, political support is present	Collaborative planning); participation potential; leadership; interactive and communicative approach; planning and discussions; community empowerment; partnership approach; involvement of the society; actor relational approach	Healey, Khakee, Motte & Needham (1997); Forester (1989, 1999); Böhme (2002) Adams & Harris (2005); Archibugi (2008); Aitken (2010); Adams, Ežmale & Paalzow (2006); Abraham (2000); Olsson (2009); Fischler (2000); Boelen (2010); Bäcklund & Mäntysalo (2010); Hudalah (2010)
Vision and aims are clearly defined, strategy for reaching of them is substantiated	Strategic dimension; spatial strategies, visioning; structure of possibilities	(Mintzberg, 1994); Myers & Kitsuse (2000); Albrecht (2004); Scheers (2006); Adams & Harris (2005); Healey, Khakee, Motte &

Key-elements of good practice	Examples of concepts in theoretical researches	Authors
		Needham (1997); Healy (2009)
Content of a document, information, data and analysis is appropriate to reach the aim established in a document and characterize spatial structure	Data amount; trends of changes in spatial processes; continuity and complexity	Hillier & Healey (2008); Adams & Harris (2005); Alden (2006); Faludi, 2004) Archibugi (2010)
Style, terminology and setting comply with the identified document audience	Interpretive approach; actor relational approach	Innes (1995); Healey (1992) Sager (1994); Adams & Harris (2005); Adams, Alden & Harris (2006)
Introduction and monitoring procedures are clearly defined	Assessment; planning introduction systems Monitoring; indices	Adams & Harris (2005); Tosics, Szemzo, Illes & Gertheis (2010); Adams, Alden & Harris (2006); Olivera & Pinho (2010); Mehmood (2010)

The methodology for evaluation of quality of spatial planning documents

Based on the conclusions made as the result of analysis of theoretical aspects of spatial planning, methodology for assessment of quality of spatial planning documents was elaborated (Ežmale, 2011). The author applied multi-criteria analysis method by establishing a matrix with two dimensions, one of which reflecting criteria for assessing spatial planning documents, the other – their assessment in respect to different kinds of spatial planning documents. The criteria assessment algorithm (from 0 to 3 points) was established in a way to assess, by means of simple and clearly identifiable measures, compliance of a particular spatial planning documents with defined criteria.

The following eight criteria were established for assessment of quality of elaboration process of a spatial planning document: political mandate; purpose and status of the document; involvement of politicians; involvement of the society; information of the society; co-ordination of planning process; planning principles, and author of the document and management of elaboration. The maximum number of points that each local government could obtain for quality of planning and elaboration process of a development planning document is 24 (8 criteria from 0 to 3 points).

The following eight criteria were established for assessment of quality of content of a spatial planning document: analysis of the present situation; thematic dimension; spatial dimension; temporal dimension; vision, priorities and aims; introduction of strategy; clarity of the text, and style and form. The

maximum number of points that each local government could obtain for quality of content of a spatial planning document is 24(8 criteria from 0 to 3 points).

The following three criteria were established for assessment of quality of procedures for introduction and monitoring of a spatial planning document: procedure of introduction; procedure of monitoring; indices and indicators. The maximum number of points that each local government could obtain for quality of procedures for introduction and monitoring of a spatial planning document is 9 (3 criteria from 0 to 3 points).

Pursuant to the elaborated methodology and the matrix, the author performed an empirical research of local governments cities and towns of Latgale region regarding compliance of the spatial planning document (development programme and territorial plan) with defined criteria and algorithm of assessment.

The assessment of local governments (2 cities and 5 towns) of Latgale region is summarized in the Table 2.

Table 2 Results of assessment of spatial planning documents of local governments of Latgale region, 2009 (Ežmale, 2011)

Local Government	1 st competence		2 nd competence		3 rd competence		Total	
	DP process	TP process	DP content	TP content	DP introduction	TP introduction	DP total	TP total
Local governments of towns and cities								
Līvāni	14	15	20	18	8	0	42	33
Rēzekne	16	18	22	18	7	0	45	36
Ludza	12	12	22	16	9	0	43	28
Daugavpils	19	16	20	8	8	3	47	27
Balvi	15	22	18	16	0	0	33	38
Preiļi	8	16	15	10	1	0	24	26
Krāslava	15	22	19	15	6	0	40	37

DP – development programme, TP – spatial plan, process – process of elaboration and planning of a planning document, content – content of a planning document, introduction – introduction and monitoring of a planning document.

As it can be seen in Table 2, higher results in evaluation of quality of development programmes were obtained by Daugavpils, Rēzekne, Ludza whilst Preiļi and Balvi have the lowest results. In the assessment of quality of spatial plans, the highest results are obtained by Balvi, Krāslava, whilst the lowest ones – Preiļi, and Daugavpils. The procedure of introduction and monitoring of spatial planning documents was the weakest of the three evaluated stages.

Assessment of quality of spatial planning documents of local governments of Latgale region shows (calculated by summarizing the score obtained at each of the assessment stages) that the results for spatial plans are higher than those for development programmes. This can be explained, that for elaboration of spatial plans were clear rules for a content, elaboration, assessment and public involvement process in Latvia, whilst for development programmes it has been introduced in last years.

According the methodology for calculation the integral quality indicators of spatial planning documents (development programmes, spatial plans and common spatial planning documents) of Latgale region (Ezmale, 2012), the integral quality indicators for development programmes and territorial plans are obtained by summarising the standardized values of results obtained in the evaluation of the three components regarding quality of spatial planning documents based on established weight (1st component – 0.3, 2nd component – 0.3, and 3rd component – 0.4). The integral quality indicator of development programmes (y_{DP}) and the integral quality indicator for spatial plans (y_{TP}) are being calculated, which can be illustrated by the following formula:

$$y = w_1 \sum_{i=1}^8 \tilde{S}_i + w_2 \sum_{i=1}^8 \tilde{P}_i + w_3 \sum_{i=1}^3 \tilde{I}_i \quad (1)$$

where $\tilde{S}_i, \tilde{P}_i, \tilde{I}_i$ are the weighted criteria in the division by components, whilst the weight w_j ($j = 1, 2, \dots, p$), which is calculated from the index (indicator) y – conditions for increasing awareness.

The formula for calculating the integral indicator that characterizes the common quality of spatial planning documents according the methodology are following:

$$y_{TPD} = \frac{1}{n} (y_{DP} + y_{TP}) \quad (2)$$

The obtained results are reflected in Table 3.

Pursuant to the integral quality indicator of spatial planning documents, the highest scores were obtained by Daugavpils, Rēzekne, Līvāni, Ludza, and Krāslava local governments.

According the results of evaluation, the interrelation between the integral quality indicators of spatial planning documents of Latgale local governments and indicators characterising territorial development Ežmale (2012) settled, that in the frameworks of the selected cities and towns, there exist correlations between indicators of quality of spatial planning documents and several

indicators of territorial development. It was concluded, that local governments of towns and cities having a higher integral quality indicators regarding spatial planning have greater personal incomes and greater number of inhabitants. There were calculated, that negative correlation exists between the integral quality indicators of territorial plans and the unemployment rate- as the integral quality indicators regarding territorial plans increase, the unemployment rate decreases.

Table 3 Integral quality indicators of spatial planning documents of local governments of Latgale region, 2009 (Ežmale, 2011)

Local governments	Integral quality indicator of development programmes (Y_{AP})	Integral quality indicator of spatial plans (Y_{TP})	Integral quality indicator of of spatial planning documents (Y_{TPD})	Rank of the local government
Daugavpils	1.65	0.234	0.942	1
Rēzekne	1.454	0.181	0.8175	2
Preiļi	0.036	-0.665	-0.3145	7
Ludza	1.546	-0.41	0.568	5
Līvāni	1.425	-0.026	0.6995	3
Balvi	0.314	0.277	0.2955	6
Krāslava	1.162	0.187	0.6745	4

Author concluded, that in the selected group of local governments, certain interrelations exist between integral quality indicators of spatial planning documents and territorial development indicators, as well as elaboration of spatial planning documents and a positive dynamics of territorial development index. Taking into account that spatial planning documents have middle- term and long- term time horizon, it could be necessary to analyse tendencies of main territorial development indicators in selected local governments. According the results of previous mentioned evaluation, the following indicators are selected – territorial development index, number of population, unemployment rate and persons with poor family status from total number of inhabitants.

Territorial development indicators of Latgale cities and towns

Economic growth became slower due to various internal and external factors, among which the most important are the global crisis, escalation of the geopolitical situation, introduction of trade sanctions and the Russian economic recession, low economic growth in the euro area, as well as the sharp fall in oil

prices in late 2014. The economy of Latvia is slowly accelerating, but the growth rate is not as strong as expected, and the territorial development index (TDI) of Latgale region cities and towns slowed down in last five years (see Table 4). The development of local governments of Latgale region have been particularly affected by economic downtown in 2009.

TDI is an indicator which is calculated with determined weight coefficients by summing up standardised values of the most important basic indicators of statistics which characterise the development. A territory development index (TDI) has been used for the assessment of development of different territorial units in Latvia.

Table 4 Territorial development index of local governments of Latgale region, 2009-2014 (source: RDIM)

Local governments	2009	2010	2011	2013	2014
Daugavpils	-0.504	-0.693	-0.680	-1.309	-1.392
Rēzekne	-1.585	-1.796	-1.931	-2.028	-2.257
Balvi*	-0.617	-0.647	-0.591	-0.821	-0.864
Krāslava*	-0.903	-1.009	-0.1000	-1.035	-1.094
Līvāni*	-0.765	-0.598	-0.622	-0.747	-0.625
Ludza*	-0.978	-1.020	-0.992	-0.951	-1.007
Preiļi*	-0.173	-0.255	-0.223	-0.810	-0.347

*together with rural parishes according the territorial division of territorial administrative reform of Latvia

The most dramatic decrease of territorial development index in last five years is recognised in two cities – Daugavpils (-0.888) and Rēzekne (-0.672).

One of the important indicators for characterising the territorial development is number of population and its changes. According the Regional development indicators module data (RDIM) of the Ministry of Environmental Protection and Regional Development of Latvia (see Table 5) the lowest decrease of number of population is in Daugavpils – by 5.46 percent. However, there is observed decline of population in all selected local governments and the population change (from 2010 to 2014) differences between the cities and towns is undistinguished.

In the ten-year period in the Latvian regions there can be observed tendencies of movement of population that simultaneously are different for each region and at the same time stable. (VRAA, 2010). In the period 2010-2014 the population number decreased most rapidly in Ludza – by 8.57 percent; in Kraslava – by 8,09 percent. The most rapid decrease of population is observed in the towns, which are located in close proximity with external border of European Union.

Table 5 Number of population at beginning the year of local governments of Latgale region, 2010 - 2014 (source: RDIM)

Local governments	2010	2011	2012	2013	2014	Changes, %
Balvi	15,674	13,949	15,228	14,972	14,606	-6.814
Daugavpils	103,754	102,496	101,057	100,006	98,089	-5.460
Krāslava	19,983	19,679	19,277	18,936	18,366	-8.092
Līvāni	14,134	13,906	13,680	13,538	13,251	-6.247
Ludza	15,844	15,456	15,178	14,900	14,486	-8.571
Preiļi	11,826	11,662	11,450	11,239	10,930	-7.577
Rēzekne	35,148	34,596	33,936	33,438	32,630	-7.164

One of the basic indicators describing the availability of human resources as well as social situation in the territories is unemployment level. Latgale region maintained the highest unemployment level during the long period, which was 17.8 % at the end 2015. The lowest level of unemployment is in Daugavpils – 6.88 percent in 2014, the highest – in Ludza with 17.54 in 2014 (see Table 6).

Table 6 Unemployment rate of local governments of Latgale region, 2010 - 2014 (%) (source: RDIM)

Local governments	2010	2011	2012	2013	2014	Changes
Balvi	18.67	18.21	14.97	15.53	14.50	-4.17
Daugavpils	9.59	8.02	7.12	7.64	6.88	-2.71
Krāslava	19.63	17.52	15.54	16.19	11.94	-7.69
Līvāni	17.93	16.24	16.11	16.64	15.02	-2.91
Ludza	22.82	20.14	17.51	17.96	17.54	-5.28
Preiļi	16.73	14.02	11.90	12.49	12.41	-4.32
Rēzekne	16.92	14.73	13.19	13.67	11.45	-5.47

The most rapid decrease of the unemployment level is observed in Krāslava, Ludza and Rēzekne.

The persons with poor family status is important indicator for analysing ability of local government to improve the economic situation. The highest share of persons with poor family status receiving the subsidies from municipal budget in from total number of inhabitants is in Ludza- 12.90 and Krāslava- 9,37 in 2014 (see Table 7).

The most rapid decrease of persons with poor family status from total number of inhabitants is in Rēzekne (-15.93), Balvi (-15.20) and Līvāni (-13.90).

Table 7 **Persons with poor family status local governments of Latgale region 2010 - 2014 (%) (source: RDIM)**

Local governments	2010	2011	2012	2013	2014	Changes
Balvi	23.45	19.38	13.94	10.58	8.25	-15.20
Daugavpils	5.47	6.60	6.02	4.99	4.58	-0.89
Krāslava	18.85	12.40	13.07	11.54	9.37	-9.48
Līvāni	20.82	11.54	12.56	9.41	7.73	-13.09
Ludza	15.03	14.29	14.65	13.54	12.90	-2.13
Preiļi	8.43	8.97	7.84	7.51	5.80	-2.63
Rēzekne	24.58	12.93	12.31	9.66	8.65	-15.93

According the previous mentioned results of evaluation of quality of development programmes and spatial plans, the highest results were obtained by Daugavpils, Rēzekne, Balvi. At the same time Rēzekne and Daugavpils have lowest territorial development index from selected local governments, Ludza and Krāslava – the most rapid decrease of population in last 5 years, as well as Krāslava, Ludza and Rēzekne – the best results in reducing of unemployment level.

In the frame of the research (Ežmale, 2011) were concluded that the analysis regional competitiveness factors and criteria is insufficient in spatial planning documents of Latgale region; therefore, it fails to ensure a wholesome use of potential of the region to favour its development. There was suggested that through elaboration of planning documents, Latgale region local governments should pay greater attention to the aspects of the business attractiveness. It would convince local entrepreneurs, potential investors that the local authority takes all necessary measures to improve the business climate and increase competitiveness in the city or town. By providing measures to increase the competitiveness factor within the city in spatial planning documents, it would create favourable conditions for business attractiveness improvement in the future.

Conclusion

Spatial planning documents of the region define development trends for different territories and places in the future in the context of their strategic roles; likewise, they define frameworks for establishment and improvement of future development. The results of the research prove that it is necessary to additionally define principles and development trends in respect to different fields of activities related with spatial issues, which would ensure integrated

approach; moreover, spatial planning should be aimed at target groups (business, inhabitants, visitors) taking into account needs and desires of each of them.

Substantial correlations between integral indicator of quality of spatial planning documents and indicator of territorial development can be observed in local governments of cities and towns. The local governments of Latgale region having a higher quality of spatial planning documents have better conditions for territorial development.

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DAUGAVPILS ŽĒLSIRDĪGO MĀSU SKOLAS IZVEIDOŠANAS AIZSĀKUMI (1939–1943)

Beginning of Daugavpils Charity Sisters' School Foundation (1939–1943)

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Abstract. *The Latvian Red Cross organization was founded in 1918 and one of its activities was foundation and maintenance of hospitals in various towns and cities of Latvia.*

The need for well-prepared charity sisters emerged due to expanding range of medical activities. Consequently, this caused the need to establish sisters' schools in Latvia. In 1921 charity sisters' schools were established in Riga and Liepaja, in 1932 the school was established in Jelgava. Later on, in 1939 two more charity sisters' schools in Riga started their work. However, the demand for charity sisters was growing. The lack of charity sisters was obvious in Daugavpils medical institutions, too. In 1939 the only Latgalian charity sisters' school was opened in the city to solve that vital problem. That school in Daugavpils worked from 1939 to 1943. During that particular period of time two graduations of educated charity sisters took place. In 1943 the school stopped functioning because of the war situation. This article aims at performing analytical overview of foundation activities of Daugavpils Charity Sisters' School.

Keywords: *Charity Nurses, hospitals, school.*

Ievads

Introduction

Latvijas Sarkanā Krusta organizācija, nodibināta 1918. gada 20. novembrī, darbojās pēc sekojošiem darbības virzieniem: katra indivīda veselības tieša pārraudzība; sabiedrības higiēnisko apstākļu uzlabošana un veselības principu popularizēšana iedzīvotāju vidū (LVVA, 4712.f, 3.apr., 88.l., 3. lpp.).

Viens no Latvijas Sarkanā Krusta darbības veidiem bija slimnīcu organizācija. Latvijas Sarkanais Krusts uzturēja slimnīcas dažādās Latvijas pilsētās: Rīgā, Jelgavā, Daugavpilī, Pļaviņās, Smiltēnē, Irlavā, Ērgļos, Skujenē (Nagobads, Vīksna, 2003). Ārstniecības darbības paplašināšanai radās vajadzība pēc labi sagatavotam žēlsirdīgām māsām. Tas radīja nepieciešamību organizēt

mūsu skolas Latvijā. Līdz ar to 1921. gadā pie Latvijas Sarkanā Krusta slimnīcas Rīgā, Ērgļu ielā, bija nodibināta žēlsirdīgo mūsu skola. Par skolas direktoru Sarkanā Krusta galvenā valde iecēla slimnīcas direktoru Dr. Aleksandru Neibergu (1883–1962). 1921. gadā arī Dr. A. Kaire nodibināja 2-gadīgo mūsu skolu pie pilsētas slimnīcas Liepājā (LVVA, 4712.f, 1. apr., 1688.l., 229.–232, 237, 251. lpp.). Tomēr Latvijā darbojošās divas skolas nevarēja visas ārstniecības iestādes valstī pilnā apjomā nodrošināt ar nepieciešamo mūsu skaitu (Nulle - Sieceniene, 1938). 1932. gada 15. oktobrī organizēja Latvijas Sarkanā Krusta žēlsirdīgo mūsu skolu arī Jelgavā (LVVA, 4712.f, 1. apr., 1688.l., 229.–232, 237, 251. lpp.). Par skolas direktoru tika iecelts Dr. Dāvids Bīskaps, Sarkanā Krusta Jelgavas slimnīcas direktors (Vīksna, 1974).

Pieprasījums pēc žēlsirdīgām māsām darbam ārstniecības iestādēs arvien pieauga. Līdz ar to 1939. gada 1. novembrī mūsu sagatavošanai atvēra Galvaspilsētas Rīgas 2. slimnīcas žēlsirdīgo mūsu skolu. Skolas direktors bija 2. slimnīcas medicīniskais direktors profesors *Pauls Stradiņš* (1896–1958) (Lāce, Gulbe, Grauduma, 2010). Tāpat Rīgā pie 1. pilsētas slimnīcas darbojās apvienotā mūsu - vecmāšu skola, kura gatavoja jaunās māsas un vecmātes (Vitoliņa, 1940).

Skolas darbojās pēc valsts apstiprinātas programmas un atradās Latvijas Veselības departamenta un Izglītības Ministrijas pārziņā (LVVA, 4712.f, 1. apr., 19.1, 16.–18, 20, 79. lpp.). Tomēr attiecībā uz statūtiem, programmu un atvēršanu tās rīkojās pēc Latvijas Sarkanā Krusta statūtiem (LVVA, 4712.f., 1. apr., 1262. l., 55, 57, 59, 61, 64. lpp.).

Ir zināms, ka Daugavpils medicīnas skola bija organizēta 1945. gadā (LVA, 1022. f., 14. apr., 79. l., 171. lpp.). Tomēr šīs skolas darbības aizsākumi vērojami jau 1939. gadā, kad šī iestāde gatavoja žēlsirdīgās māsas. Līdz ar to šī raksta **mērķis** ir veikt analītisko pārskatu par Daugavpils Žēlsirdīgo mūsu skolas darbību. Pēc laika uzbūves šis raksts ir retrospektīvs. Rezultātu iegūšanai, izņemot literatūru un periodiku (avīzes: „Daugavas vēstnesis” „Rēzeknes ziņas”, „Tēvija”, „Cīņa”) bija izmantoti arī Latvijas Valsts Vēstures arhīva 4712. fonda lietas. Darbā izmantotas tradicionālās vēstures izpētes metodes - dokumentu hronoloģiskā sistematizācija un vēsturiski salīdzinošā metode.

Daugavpils žēlsirdīgo mūsu skolas izveidošana *Foundation of Daugavpils Charity Sisters' school*

Runājot par veselības aizsardzības sistēmas stāvokli Daugavpilī, 20. gs. trīsdesmitajos gados pilsētā uz 45–50 tūkstošiem iedzīvotāju darbojās pilsētas slimnīca, apriņķa slimnīca (katra uz 180 gultas vietām) un Sarkanā Krusta slimnīca uz 115 gultām. 1939. gadā Daugavpilī notika slimnīcu reorganizācija – apvienoja pilsētas un apriņķa slimnīcas un kā rezultātā izveidojās Daugavpils

apvienotā slimnīca ar direktoru Dr. P. Grišānu priekšgalā. Darbam ārstniecības iestādē bija nepieciešams labi sagatavots medicīnas personāls. Lai atrisinātu šo situāciju bija nepieciešams organizēt pilsētā vecmāšu un žēlsirdīgo māsu skolu (Anonīms autors, 1939). Šī ideja izraisīja lielu interesi sabiedrībā. Līdz ar to slimnīcas direktors Dr. P. Grišāns apmeklēja tautas labklājības ministrijas veselības departamentu un Sarkanā krusta galveno valdi. Šajā sakarā Latvijas Sarkanā Krusta galvenās valdes un žēlsirdīgo māsu Savienības pārstāvji viennozīmīgi atbalstīja žēlsirdīgo māsu un vecmāšu skolas organizēšanu Daugavpilī (Anonīms autors, 1939).

Visas pūles vainagojās ar to, ka 1939. gada 15. oktobrī pēc valsts prezidenta ierosinājuma, ar Daugavpils pilsētas pašvaldības atbalstu bija atvērta vienīgā Latgalē 3-gadīga žēlsirdīgo māsu un vecmāšu skola. Par skolas direktoru bija nozīmēts Daugavpils apvienotās slimnīcas direktors Dr. P. Grišāns (LVVA, 4712.f., 1.apr., 1767.l., 182., 283. lpp.).

Skolas statūti *Statutes of school*

Lai uzsāktu skolas darbību, 1939. gadā bija pieņemti un Tautas labklājības ministrijai apstiprināti Daugavpils žēlsirdīgo māsu un vecmāšu skolas statūti. Balstoties uz statūtiem, Daugavpils žēlsirdīgo māsu un vecmāšu skolas mērķis – sagatavot teorētiski un praktiski izglītotas žēlsirdīgās māsas un vecmātes slimo kopšanai, veselības aizsardzībai un dzemdību palīdzībai. Skola pastāvēja pie Daugavpils apvienotās slimnīcas, un to uzturēja Daugavpils apriņķa pilsētu un pagastu pašvaldību sadarbības apvienība. Mācību maksu, kā arī uzņemamo audzēkņu skaitu, noteica apvienības valde. Daugavpils apriņķa pilsētu un pagastu pašvaldību sadarbības apvienība, lai atbalstītu trūcīgākās audzēknes, varēja izsniegt atmaksājamas stipendijas mācības maksas apmērā.

Skolai bija paredzēts savs budžets, kuru sastādīja Sadarbības apvienības valde, saskaņojot to ar skolas direktoru. To apstiprināja Sadarbības apvienības pilnvarnieku sapulce. Skolas grāmatvedību un darbvedību veica Daugavpils apvienotās slimnīcas kanceleja. Skolas direktors izvēlējās mācību spēkus, kurus apstiprināja Sadarbības apvienības valde. Direktora amatu un mācību spēkus apstiprināja Tautas labklājības ministrijas Veselības departaments. Mācību kursa ilgums bija trīs gadi, ietverot teorētisko un praktisko daļu. Mācību programmu apstiprināja Tautas labklājības ministrijas Veselības departaments. Pirmajos divos gados notika audzēkņu kopīgas apmācības, bet sākot ar trešo mācību gadu, katra audzēkne varēja izvēlēties specialitāti. Lai iegūtu apliecību divās specialitātēs, bija nepieciešams papildus nostrādāt skolas pārziņa (direktora) norādītā iestādē 6 mēnešus otrā specialitātē. Skolas direktors izstrādāja uzņemšanas noteikumus skolā, kurus apstiprināja Veselības departaments.

Audzēknes skolā uzņēma skolas direktors kopā ar audzinātājiem, saskaņā ar uzņemšanas noteikumiem. Audzēknes pakļāvās skolas administrācijai un Daugavpils apvienotās slimnīcas pastāvošiem noteikumiem par palīgpersonālu (kopējām, vecmātēm, māsām). Par audzēkņu nolaidību un nesekmīgām mācībām, administrācijas rīkojumu neizpildīšanu, rakstura nepiemērotību žēlsirdīgās māsas vai vecmātes profesijai, audzēknes, pēc skolas direktora priekšlikuma Sadarbes apvienības valdei, izslēdza no skolas. Apmācības laikā audzēknēm bija jākārtro kontrolpārbaudījumi, kuru veidu un laiku noteica skolas pārzinis un mācību spēki. Pie gala pārbaudījumiem bija pielaistas tikai tās audzēknes, kas bija izturējušas kontrolpārbaudījumus un izpildījušas visus praktiskos darbus un patstāvīgi pārraudzījušas ne mazāk kā 30 dzemdības. Gala pārbaudījumu komisijā piedalījās Tautas labklājības ministrijas Veselības departamenta, Latvijas Sarkanā Krusta pārstāvji – ārsti, skolas pārzini un attiecīgo priekšmetu mācību spēki. Pārbaudījumu izturējušās audzēknes, atkarībā no izvēlētās specialitātes, saņēma žēlsirdīgās māsas vai vecmātes apliecību, kuru parakstīja pārbaudījumu komisijas locekļi.

Šo statūtu grozīšanai bija nepieciešama Tautas labklājības ministrijas Veselības departamenta piekrišana. Visos gadījumos, kas nav minēti šajos statūtos vai izdotos uzņemšanas noteikumos, skola un viņas darbība bija pakļauta pastāvošiem likumiem un Valdības rīkojumiem (LVVA, 4712.f., 1.apr., 1767.1., 182., 283. lpp.).

Audzēkņu uzņemšanas noteikumi *Rules of Admission of students*

Tāpat 1939. gadā, bija pieņemti Daugavpils žēlsirdīgo māsu un vecmāšu skolas audzēkņu uzņemšanas noteikumi. Atbilstoši noteikumiem, skolā uzņēma Latvijas pilsones vecumā no 18 līdz 30 gadiem, ar pabeigtu vidusskolas izglītību, pilnīgi veselas (veselību pārbaudīja Daugavpils apvienotās slimnīcas ārstu komisija) un morāli nevainojamas.

Gadījumā, ja pieteicās vairāk kandidātu, nekā bija plānots, skolas direktors saziņā ar Daugavpils apriņķa pilsētu un pagastu pašvaldību sadarbības apvienības valdi, nozīmēja iestāšanās eksāmenu – eseju. Mācības maksa žēlsirdīgo māsu un vecmāšu skolā bija 20,00 Ls apmērā, kuru bija jāmaksā katru mēnesī. Trūcīgam skolas audzēknēm Daugavpils apriņķa pilsētu un pagastu pašvaldību sadarbības apvienības valde piešķīra stipendijas, kuras bija jāatmaksā pēc skolas beigšanas. Iestājoties skolā, kandidātēm bija jāsamaksā 2,00 Ls, pievienojot šādus dokumentus: uzrakstīts dzīves apraksts ar informāciju par ģimenes sastāvu, dzīves apstākļiem, iegūto izglītību, līdzšinējo nodarbošanos; apstiprinātu pases norakstu; apliecību jeb norakstu par iegūto izglītību; potēšanas zīmi pret bakām; divas fotogrāfijas.

Pēc uzņemšanas skolā audzēknēm bija jāparaksta saistības raksts, kurā viņas apsolīja ievērot skolas noteikumus un disciplīnu. Pirmos četrus mēnešus pēc uzņemšanas skolā bija pārbaudes laiks, kurš pierādīja audzēkņu atbilstību žēlsirdīgo māsu profesijai. Pārbaudes laikā audzēknes varēja izstāties no skolas, iepriekš paziņojot skolas direktoram. Gadījumā, ja mācību laikā tika konstatēts, ka audzēknes veselība vai raksturs neatbilst žēlsirdīgo māsu vai vecmāšu darbam, tai brīvprātīgi bija jāizstājas no skolas vai viņu izslēdza piespiedu kārtā Sadarbes apvienības valde, pamatojoties uz skolas direktora ziņojumu. Šajā gadījumā iemaksāto skolas naudu neatmaksāja. Mācību laikā audzēknēm bija jādzīvo skolas internātā, kur viņas nodrošināja ar ēdināšanu, gultas veļu un darba drēbēm. Akūtos saslimšanas gadījumos audzēknes ārstēja bezmaksas. Tāpat katru gadu audzēknēm pienācās atvaļinājums (2 nedēļas). Īpašos gadījumos skolas pārzinim bija tiesības piešķirt audzēknēm papildus atvaļinājumu (LVVA, 4712.f., 1.apr., 1767.l., 182., 283. lpp.).

Skolas darbības apskats *Review of School Activities*

Kad bija pieņemti un apstiprināti skolas statūti un uzņemšanas noteikumi, avīzē „Daugavas vēstnesis” bija izsludināta reflektantu uzņemšana Daugavpils Žēlsirdīgo māsu un vecmāšu skolā, kura notika no 1 līdz 15. oktobrim 1939. gadā. Dokumentus pieņēma Daugavpils apvienotās slimnīcas kancelejā, Daugavpilī, 16. novembra ielā 39.” (Anonīms autors, 1939).

Interese par jauno skolu bija liela, jo pieteicās vairāk nekā 80 audzēknes. No tām uzņēma tikai 20. Apgūt žēlsirdīgo māsu profesiju izrādīja vēlmi ne tikai meitenes no Daugavpils, bet arī no citiem Latgales novadiem: no Malnavas, Rēzeknes, Līvāniem un Abrenes. Skolai nebija savas ēkas un telpas bija īrētas. Tomēr pie skolas, veclaicīgā nama, Saules ielā 41. bija internāts, kur audzēknes bezmaksas dzīvoja un mācījās. Par skolas audzinātāju strādāja A. Bitaine, pilsētas slimnīcas virsmāsa (Anonīms autors, 1940).

Sākot ar 1933. gadu, Latvijas Sarkanā Krusta žēlsirdīgo māsu skolās sāka īstenot trīsgadīgo māsu sagatavošanas programmu (LVVA, 4712.f., 1. apr., 1688.l., 234. lpp.). Apmācības kurss bija teorētiskais un praktiskais. Pirmie divi gadi bija paredzēti teorijas apgūšanai, pēdējais, trešais, gads veltīts praksei slimnīcās. Studiju gados audzēknes studēja anatomiju, fizioloģiju, ķirurģiju, iekšējās slimības, mājturību un dietoloģiju, sociālā darba principus un citus priekšmetus (LVVA, 4712.f., 1. apr., 1688.l., 229.–232, 237, 251. lpp.). Līdz ar to par mācību spēkiem skolā bija uzaicināti vietējie ārsti. Par lektoriem strādāja apvienotās slimnīcas direktors Dr. Zaķītis, Sarkanā Krusta slimnīcas direktors I. Tepfers un ārsti: A. Kalniņš, I. Babris, K. Bajārs, E. Egle un E. Rode. Mācības bija intensīvas: audzēknēm bija jāceļas jau tūlīt pēc pieciem no rīta. Trešais

apmācības kurss bija veltīts praktiskām nodarbībām. Topošās žēlsirdīgās māsas praktizējas Sarkanā Krusta, apvienotajā un kara slimnīcā. Viņas sūtīja uz slimnīcām, lai mācītos un palīdzētu tur laboratorijās, kabinetos, virtuvē un slimnieku palātās. Tikai dažkārt pēc plkst. 20.00 vakarā, audzēknes, kuras nebija aizņemtas slimnīcā, pulcējas pie radio ar rokdarbiem vai dzeju grāmatu, bet jau plkst. 22.30 tika izslēgta gaisma. Pirmo kursu pabeidza 15 audzēknes (Anonīms autors, 1940).

Žēlsirdīgo mūsu un vecmāšu skolas darbībai un audzēkņu uzturēšanai Tautas Komisāru Padome piešķīra Veselības aizsardzības tautas komisariātam pabalstus: 1940. gadā - 21 000 Ls (Anonīms autors, 1939), 1940. gadā – 8 000 Ls (Latvijas PSR Tautas Komisāru Padomes lēmumi, 1940). Pateicoties finansiāliem atbalstiem, audzēkņu uzņemšana turpinājās arī nākamajos 1941. un 1942. gados, ievietojot vietējās avīzēs (piem., Daugavpils Latviešu avīzē, Daugavas vēstnesī) sludinājumus par audzēkņu uzņemšanas noteikumiem un dokumentus pieņemšanas termiņiem. Ir zināms, ka otrajā kursā 1941. gadā mācījās 14 audzēknes.

Skolas noorganizēšanā un izveidošanā lieli nopelni bija toreizējam Daugavpils apvienotās slimnīcas direktoram Dr. P. Grišanam, kurš strādāja šajā amatā no 1939. līdz 1941. gadam. Pēc tam mūsu skolas darbs bija cieši saistīts ar skolas direktora Dr. Zaķīša darbību, kas ārpus darba pilsētas slimnīcā, ļoti daudz pūļu ziedoja jauno žēlsirdīgo mūsu sagatavošanā. Tāpat lieli nopelni mūsu skolas darbā bija skolas mācai – audzinātajai V. Lodziņai, kura rūpējas par laba medicīniskā personāla sagatavošanu, bet arī jauno mūsu sabiedrisko audzināšanu (Anonīms autors, 1943). Daugavpils žēlsirdīgo mūsu skolā bija organizēts arī studentu koris, kurš piedalījās svinīgos pasākumos pilsētas slimnīcās (Anonīms autors, 1941).

Pēc sekmīgi izturētiem pārbaudījumiem 1941. gada maijā Daugavpils žēlsirdīgo mūsu skola izvadīja darbā 12 jaunas žēlsirdīgās māsas (pēc teorētiskā kursa apguves). Svinīgajā izlaidumā, kas notika skolas internāta telpās, piedalījās Novada komisāra pārstāvis štāba vadītājs Schuck's, skolu padomnieks Wieckberg's, komisariāta nodaļas vadītājs Miller's, Latvijas mūsu Savienības priekšniece J. Kuške, pilsētas vecākais vietnieks O. Stūrmanis, izglītības nodaļas vadītājs A. Vārpsalietis, slimnīcu direktori Dr. Tepfers un Dr. Fjodorovs, ārsti un žēlsirdīgās māsas.

Skolas direktors Dr. Zaķītis uzrunājot absolventes, teica:

„Pēc intensīva mācību laika jūs šodien izejat praktiskā darbā kā jaunas žēlsirdīgās māsas. Kā spējš negaiss par mūsu zemi un arī Daugavpilī drāzās karš, kam bija lemts straujā un neatvairāmā triecienā sadragāt visus tumšos spēkus. Te nu jums, topošajām māsām, pirmo reizi vajadzēja saskarties ar darbu, skolā mācīta teorija bija jāpielieto praksē. Nenoliedzami, ka darbs izpostītājā Daugavpilī un pie tam kara apstākļos prasīja smagus pārdzīvojumus,

bet šie pārdzīvojumi jūsu turpmākajam darbam deva nelokamu stāju. Pēc laika varēja sākt atkal mācības. Te nu mēs sadūrāmies ar grūtībām, jo viss bija jāsāk no jauna. Bija jāpārvērtē arī jūsu morāliskā stāja. Šodien mēs redzam, ka jūsu pūles ir vainagojušās ar panākumiem – jūs varat sākt žēlsirdīgās māsas īsto darbu. Šis brīdis ir pagodinājuma pilns. Bet jūs nedrīkstat aizmirst to atbildību, ko nākamajā darbā nesīsit. Turiet cieņā morālisko stāju, kas latviešu māasai arvienu bijis raksturīgs – disciplīna un pašizliedzība”.

Savas runas noslēgumā direktors izteica pateicību Novada komisāram, viņa līdzgaitniekiem un pilsētas pašvaldībai, kas galīgi izpostītajai skolai deva iespēju atkal atjaunot darbu. Atbildot apsveikumiem un novēlējumiem, skolas absolventu pārstāve Ondrupe pateicās skolas direktoram, audzinātājam, lektoriem un sabiedrībai par skolas laikā sniegto atbalstu un pūlēm. Viņa solījās cauri visām grūtībām attaisnot visas viņu audzināšanai pieliktās pūles un ar patiesu gribu kalpot tautai un dzimtenei (Anonīms autors, 1941).

Veselības departamenta noorganizētā māsu skolā pie Daugavpils apvienotās slimnīcas 1943. gada oktobrī notika otrais izlaidums. Daugavpils māsu skolu ar māsas tiesībām beidza 12 absolventes. Skolu beigušām bija izsniegtas gatavības apliecības, bet pirmā kursa audzēknēm, kas beigušas divgadīgo teorijas un prakses kursu, apliecību par šī kursa beigšanu (Anonīms autors, 1943). Veselības departamenta pārstāvis Daugavpils aprinča ārsts Dr. A. Malvess skolas absolventes sveica Veselības departamenta vārdā un izsniedza skolas beigušām apliecības. Jaunās māsas sveica arī Daugavpils pilsētas vecākais J. Niedra. Pilsētas vecākā uzrunas noslēgumā izlaiduma akta dalībnieki nodziedāja „Dievs, svēti Latviju”.

Māsu skolas izlaidumu ar uzrunu atklāja skolas direktors *Dr. Zaķītis*: „*Ja jūsu darbs māsu skolā bijis sekmīgs, tad var ticēt, ka turpmākā darbā jūs pavadīs tādas pašas sekmes un pratīsiet teoriju saskaņot ar praksi, māsas ētiku un pienākumu sajūtu. Visur tur, kur jūs iesiet un strādāsiet, lai katrs sajūt, ka jūs esat latviešu māsas”* (Anonīms autors, 1943).

Tas bija pēdējais izlaidums Daugavpils žēlsirdīgo māsu skolā, jo kara apstākļos skola pārtrauca savu darbību.

Diskusija **Discussion**

Analizējot žēlsirdīgo māsu skaitu Latvijā, 1939. gadā Sarkanā Krusta organizācijā kopumā bija reģistrētas 743 žēlsirdīgās māsas (Kuške, 1939). Savukārt, valstī 1938. gadā darbojās 893 vecmātes (Skujenieks, 1938). Pārsvarā žēlsirdīgo māsu skolas Latvijā trīsdesmitajos gados 20. gs. bija organizētas Vidzemē un Kurzemē. Savukārt vecmātes gatavoja Rīgā pie 1. pilsētas slimnīcas. Līdz ar to Latgalē bija pamanāms izteikts māsu un

vecmāšu trūkums. Vienīgā izeja, lai atrisinātu šo situāciju, bija žēlsirdīgo māsu un vecmāšu skolas organizācija Latgalē. Analizējot ārstniecības iestādes Latgalē, tieši Daugavpilī, 1939. gadā darbojās samērā lielas slimnīcas: Daugavpils apvienotā un Sarkanā krusta slimnīca, kuras varēja nodrošināt topošiem speciālistiem labu prakses bāze. Līdz ar to 1939. gada oktobrī Daugavpilī bija atvērta vienīgā Latgalē 3- gadīga Daugavpils žēlsirdīgo māsu un vecmāšu skola. Tomēr neskatoties uz skolas nosaukumu, gatavoja tikai žēlsirdīgās māsas. Vēlāk, sākot no 1941. gada bija mainīts arī skolas nosaukums: „Daugavpils žēlsirdīgo māsu skola”. Tas liek domāt par to, ka kara apstākļos prioritāte bija atdota žēlsirdīgo māsu sagatavošanai, tāpēc nebija veikta vecmāšu apmācība. Līdz ar to tāds nosaukums pastāvēja arī turpmākos skolas darbības gados (līdz 1943. g.). Skolai bija liela popularitāte un pretendentes brauca no visas Latgales. Tomēr, neskatoties uz žēlsirdīgo māsu trūkumu, topošo māsu skaits skolā nebija liels. Tā, pirmajā kursā 1939. gadā no 80 pretendentiem pieņēma tikai 20. Arī turpmākos gados audzēkņu skaits svārstījās: 12-15 topošo māsu vienā kursā. Tas bija saistīts ar finansiālo ierobežojumu un ar izvirzītajām augstām morālām un darba prasībām topošiem speciālistiem.

Secinājumi *Conclusions*

1939. gadā Daugavpilī organizēta Žēlsirdīgo māsu un vecmāšu skola (turpmāk līdz 1943. gadam Žēlsirdīgo māsu skola) bija vienīgā iestāde Latgalē, kur gatavoja topošos speciālistus darbam medicīnas iestādēs.

Sākoties karam, neskatoties uz plānoto žēlsirdīgo māsu un vecmāšu sagatavošanu, skolā tika mainīta prioritāte topošo speciālistu sagatavošanā. Līdz ar to gatavoja tikai žēlsirdīgās māsas.

Sākot ar skolas dibināšanu, šī mācību iestāde ieguva lielu popularitāti, par ko liecina pretendentu skaits studijām.

Žēlsirdīgās māsas Daugavpilī turpināja gatavot darbam ārstniecības iestādēs arī kara gados, pievēršot uzmanību māsu profesijas prestižam un audzinot tās patriotisma garā.

Summary

The Red Cross organization in Latvia was founded in 1918 and one of its activities was foundation and maintenance of hospitals in different Latvian towns and cities. In order to widen the range of medical activities, the need for well-educated charity nurses emerged. This, in its turn, triggered the demand for establishing a nurses' school in Latvia.

In 1921 charity sisters' schools were established in Riga and Liepaja, in 1932 the school was established in Jelgava. Later on, in 1939 two more charity sisters' schools in Riga started their work. However, the demand for charity sisters was growing. The lack of charity sisters

was obvious in Daugavpils medical institutions, too. In 1939 the only Latgalian charity sisters' school was opened in the city to solve that vital problem.

As a consequence of the war situation, regardless of the plans to educate charity nurses and chief-nurses, the school changed the priorities in education. The school educated charity sisters only.

During that period of time two graduations of charity sisters took place. The school was very popular and candidates originated from all over Latgale. However, despite the fact that there was a great lack of charity sisters, the number of students was not big. This particular situation was caused by the lack of financial resources as well as strong moral and working demands for future nurses.

This school was functioning from 1939 to 1943. Education of nurses and their preparation for work at medical institutions continued during the two years of war, taking into consideration both prestige of this profession and education in the spirit of patriotism.

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COMPETITIVENESS OF TRANSPORT COMPANIES IN THE OPINION OF STUDENTS

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Abstract. *The paper presents the results of a quantitative research study carried out with 280 transport logistics students in Lithuania. The research focused on the students' opinion about the competitive advantage of Lithuanian transport companies. During their professional training, they filled out an electronic demographic data form online and evaluated the importance and attainability of the offered values on a 5-point Likert scale. The results revealed that when increasing the competitiveness of transport companies, the main attention should be paid to the customer - consumers, and their needs must be taken into account.*

Keywords: *competitiveness, consumer, student, transport company.*

Introduction

Successful business is increasingly dependent on the company's management of the investment in people. Lithuanian transport companies revealed that consumers are forcing them to put more focus on competitiveness, to increase their market share, as well as to increase profits.

In today's world customers are increasing their demands desired goods or services. Product and services market is overcrowded and can meet virtually every customer's desire. Only companies that continuously improve consumer activities may compete in the market. Practically every transport enterprise to extent directs its activities to satisfy customer needs.

Logistics customer service should be understood implementation of mutually coordinated activities or logistics services affecting on customer satisfaction when is purchasing the product – the last act of process which usually starts by placing an order and ends delivery of the product to the customer (Wyrwicka et al.,2015).

From a logistical point of view, the end user suggests the final location of cargo reception, sets deadlines for deliveries and acquires title to the goods (Cyplik et al., 2008). Should be noted that these subordination of the company's activities to satisfy customer needs is reflected in practically every features implemented by the company.

The aim of the paper is to analyze the competitiveness of transport companies by identifying students' opinions and their subjective experiences in their professional training.

The research methods used by the authors included a literature review and a questionnaire survey of transport logistics students conducted in 2014 - 2015 among transport companies in Lithuania.

In order to analyze the consumer's attitude towards transport companies and to assess the competitiveness-enhancing factors, quantitative research was used, which allowed the authors to explore students' opinions, as well as to identify the competitiveness-enhancing user related factors for transport companies.

Theoretical aspects of fulfilling consumer needs

Today, the consumer is in the spotlight of attention of many European Union Member States. This is reflected in the survey results carried out in various member states (European Consumer Satisfaction Management Guide, 2010). Nearly two-thirds of the members pointed out that the knowledge of the consumer is one of the most important factors. It is therefore clear that the consumer is also important for business itself.

Consumers will always want to get a high quality service that meets set expectations. If the customer, after the completion of service, is satisfied, then re-purchase becomes possible. One of the most important factors which shows the company's marketing strategy success is the fulfilment of the consumers' needs (Dudzevičiūtė & Peleckienė, 2010).

A company of any nature, and especially those in the transport service sector must provide products and services to customers in order to implement their logistics strategy.

Main logistics strategy objectives:

- improvement of services, admitting that income depends on the level of logistics services provided;
- cost reduction by reducing the variable costs associated with transportation and storage;
- capital reduction to a minimum, reducing the investment in the logistics system and maximizing the return on assets of logistics.

A logistics strategy allows maintaining the highest level of customer service, despite the changes taking place in the company. This is especially relevant to companies supplying specific products or companies that provide services to special customers (Nedelescu- Ionescu & Rujan, 2014).

Empirical studies have shown that when the user is satisfied with the service received, his emotional attachment to the company becomes stronger (Perez et al., 2013).

The fulfilment of consumer needs in today's society under the current market economy dictates the tasks for the companies - to maintain the existing and attract new customers (Bivainis & Zinkevičiūtė, 2006).

Due to the expanding global competition, new technologies came into use that improved the relationship between consumers and businesses, thus increasing customer expectations towards products and services. These changes in recent years have improved the satisfaction of users' needs. Businesses around the world are encouraged to look for ways to reduce costs, improve quality and meet the growing demands of consumers (Nedelescu- Ionescu & Rujan, 2014).

Consumer's choice of purchasing a product (good or service) is determined by economic, political - legal, technological and demographic factors.

Consumer's behaviour - a behaviour related to the satisfaction of receiving service, which is sought, ordered, used, and disposed of, as well as the opinion formation about the delivery of the service. Consumer's behaviour change is formed with influence of various factors.

Consumer's behaviour change is mostly influenced by the search and evaluation costs (Zikienė & Brazinskaitė, 2010). Karaliūtė & Pilelienė (2012) and Palšaitis (2010) reveal that the factors influencing decision-making to purchase are: price, quality, and the service that is provided on time and in place (transport companies' services are no exception, due to untimely arrival of cargo, downtimes and additional expenses).

The organization must ensure that it will be taken care of the customer and other interested parties' needs and expectations. Factors such as health and safety, consumer traits, reliability, ergonomics and other factors important to customers must be evaluated. The management must ensure that the risks to customers are identified and reduced (Yaya et al., 2014).

Transport companies are no exception, therefore, the management must assess the consumer-related actions in order to improve their services. Customers of transport companies can be frustrated by inadequate services related to cargo delays, lack of information or other problems.

Services that do not meet the customers' expectations are evaluated through complaints. The main actions taken by the company to address customer complaints are development of instructions regarding addressing customer complaints and immediate measures and attendance at the customer's location to review and respond to the customer's complaints (Nabavi et al., 2014).

Transport company's competitiveness-enhancing factors

In the process of globalization, a market economy leads to intensified competition among transport companies, as well as a more complex business environment.

Transport company's ability to ensure the meeting of needs of the customer, in coordination with other interested groups, increases its competitiveness.

Competitiveness manifests differently at different levels. The transport company in the chosen market is not the only one. Generally, other companies are striving to meet the same needs of the customer. In this way, there is a constant competition for the customer among the companies.

Each company's most important task (Pajuodis, 2005) is to satisfy the needs of targeted selective customers and make a profit. For this purpose, transport companies have established relationships with suppliers and analyse the customer needs in order to meet them best. The company has to investigate their microenvironment and, in accordance with the situation and the changes taking place in it, adopt and implement their marketing decisions.

Porter's five forces model allows us to describe the competitive environment (Virvilaitė, 2012); its advantage shows through the concentration of separate businesses and products or production evaluation elements.

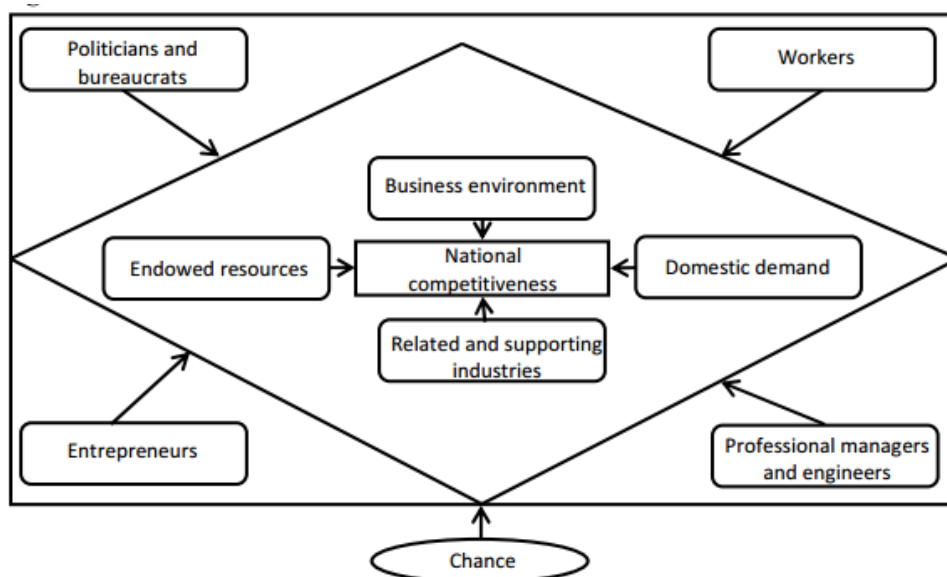


Figure 1 **Nine-factor model (Balcarová, 2014)**

Balcarová (2014) improved M. Porter's Diamond model and proposed a nine-factor model (Fig. 1), which can be used in practise in both developed and developing countries. As we can see in Figure 1, this model mainly analyzes the

factors that influence competitiveness. The advantage of this model is that analyzing more factors provides a more accurate, targeted result.

The nine factors of the model can be used to figure out different professions' impact on competitiveness (Mitkutė & Nagreckaitė, 2005). Thus, the analysis of competitiveness on the basis of the nine-factor model is necessary to thoroughly investigate both natural and human factors. It is an in-depth analysis of these factors that allows us to identify what strongly influences the competitiveness. For example, the transport company's competitiveness determines the number of professional staff.

Transport companies affected by globalization processes tend to use temporary workers, who are often students. Temporary employment services (Svedaite & Ambras, 2013) contribute to the reduction of costs for businesses, and as a place for students' training, it promotes not only closer mutual communication and cooperation between the scientific and business sectors but also market-oriented practical learning for young people, adapting their theoretical knowledge acquired at a higher education institution.

Temporary work is useful for the student as well. The student gains experience, knowledge, the student's qualification is increased; it is easier for the student to find a job and he/she becomes more suitable to the labour market. It should be noted that the business and higher education sectors must focus on purposeful mutual cooperation. Nevertheless, in order to establish more efficient cooperation between business and science and to maintain a closer dialogue, it is stated that businesses are interested in the flexibility and control of labour relations, as well as in the reduction of unemployment among young professionals (Svedaite & Ambras, 2013).

For this reason, the professional skills and expertise of youth are needed in order to increase the competitiveness of young people in the labour market and the company's success. Practical training is a tool that develops personal skills and theoretical knowledge as well as helps to implement and adapt it in the practical work environment.

It is important to promote and maintain effective cooperation between business and higher education institutions in pursuance of a successful resettlement of students into the labour market and their competent professional training.

An analysis of scientific sources showed that the transport company's factors that affect its competitive advantages are primarily the company's founders and executives who care about students as future workers in the market. Also, these companies continually analyze their suppliers, competitors and consumer expectations.

The analysis of scientific sources showed that the competitiveness-enhancing factors, such as competitors and consumers.

Competitiveness of transport companies, based on the attitude of students as consumers

The study took place in 2014-2015 during the practical training of students of Vilnius Technology and Design College, study programme Transport logistics, in transport companies. Three hundred and four students participated in the study.

Study sample - survey sampling bias is calculated according to the Paniott formula (Valackienė, 2004)

$$n = \frac{1}{\Delta^2 + \frac{1}{N}}; \quad (1)$$

where: n – sample size,

Δ^2 – bias probability,

N – target population, which ensures approximately a 5% probability of bias.

After the evaluation of the study sample bias, it was found that the minimum number of respondents was to be 174 students. The number of respondents was 280 students.

Data collection method - a questionnaire survey, which was carried out electronically, through www.apklausa.lt and sent to the students via their personal e-mails.

Questionnaire items were compiled structured, containing response options. Most issues have been concluded using the Likert scale, as more useful information for the investigation can be collected when responding to these types of questions.

The study was aimed to analyze the transport companies' competitive advantage in the students' opinion, as they were the customers and determined what impact on the competitiveness the consumer's attitude had.

First, the respondents were asked what the transport companies' competitiveness factors were. The question was formulated using the Likert scale, where 1 - not important at all, 2 - does not matter, 3 - partly important, 4 - important, 5 - very important.

The respondents were (Fig. 2) to evaluate these criteria according to importance - is the customer satisfaction evaluated, are the competitors' activities analyzed, are additional services provided, is there focus on company's advertising, as well as are quality management systems introduced?

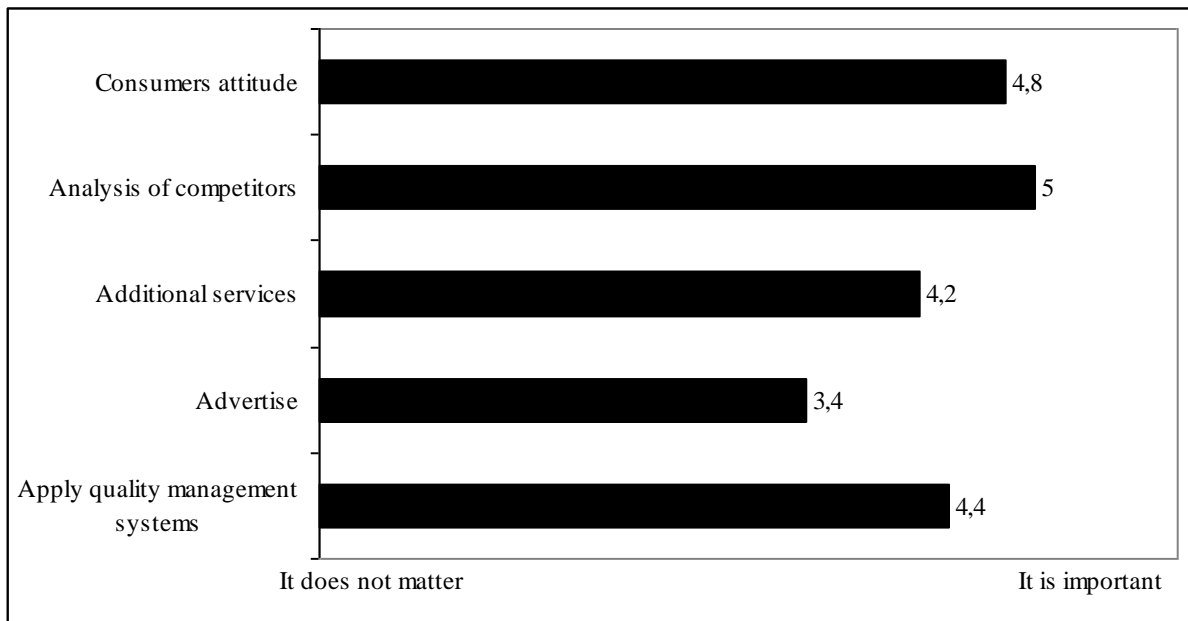


Figure 2 **Factors of a transport company that increases its advantage** (Ginavičienė & Sprogytė, 2015)

The results showed that the most important competitive advantage enhancement criterion for the transport companies was an analysis of competitors (average = 5) and a consumer satisfaction rating (average = 4.8). A less important factor for transport companies was a strong focus on advertising. The total average rating was 4.36. Mode - 3, Median - 4.

For this purpose, using the statistical program SPSS, Spearman's coefficient was calculated, the value of which showed a strong relationship between customer satisfaction assessment ($0.75 > 0.05$) and the impact on the implementation of quality management systems and the analysis of competitors' activities. It revealed the transport companies' dependence on the competitiveness-enhancement advantage and relationship strength.

The respondents were asked to evaluate and compare the transport companies' activities and priorities (Fig. 3), in which their practical work was carried out, with other transport companies.

Most, i.e. 28% of the respondents stated that the company which they completed their training at, focused on continuous consumer surveys, and continuously responded to the comments received. Of them, 23% said that there was a continuous performance analysis of competitors and market monitoring. Not so much emphasis upon the transport company's internal environment, only 13% of the respondents indicated that their company had a team spirit.

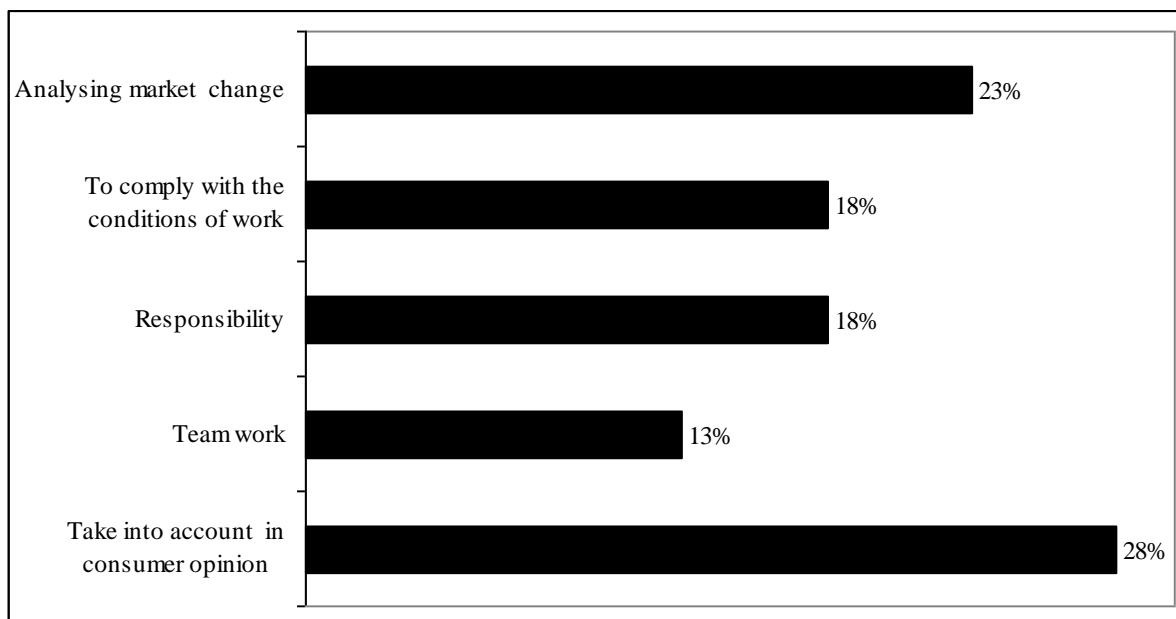


Figure 3 Criteria according to which the transport company compares its performance with that of its competitors (Ginavičienė & Sprogytė, 2015)

Two criteria: there was strong dependence on specific skills of personnel and skilled workers, where Spearman's coefficient value was ($0.75 > 0.05$), which suggests that the factors are related to each other and their relationship has a strong correlation.

In assessing the transport companies' success in the market, the respondents had to evaluate the time the service was provided in, the quality, competitive price, company name awareness, increase in the number of customers, as well as transport companies' approach towards consumers feedback from both existing and new customers. Fig. 4 provides data on the transport companies' success factors.

The question was formulated using the Likert scale, where 1 - not important at all, 2 - it does not matter, 3 - partly important, 4 - important, 5 - very important. Carrying out the works on time was found by the respondents as the major factor for a transport company. Of the respondents, 24 % noted it. Consumer research and taking their comments into account was a very important factor towards the transport company's success. This criterion was specified by 20 %. In order to successfully operate in the transport market, according to 7 % of the surveyed students, the company's name was important.

By applying the statistical program SPSS, Spearman's coefficient was calculated, which enabled the comparison of the factors and showed the strength of the correlation coefficient. The transport companies' competitiveness-enhancing factors, such as complaints from former and current customers had strong dependence ($0.75 > 0.05$) for the number of regular customers and the

company's reputation. Not less important were the factors of dependence and the strength of the correlation coefficient ($0.95 > 0.05$) in the price competitiveness and flexibility to carry out orders, as well as the quality of work.

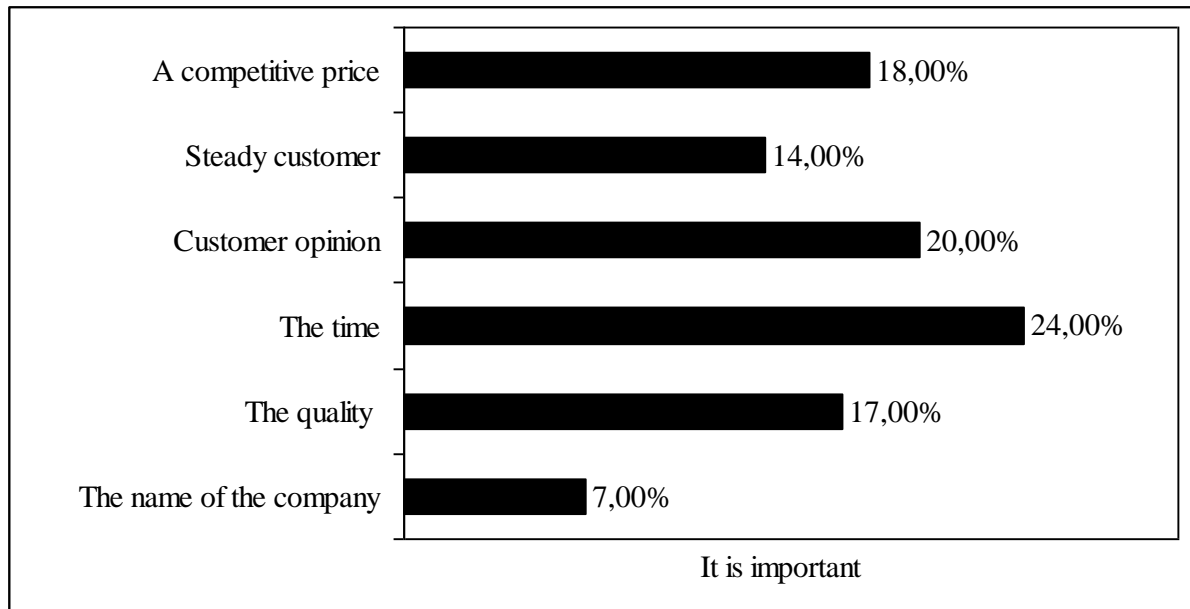


Figure 4 **Transport company's success factors (Ginavičienė & Sprogytė, 2015)**

Taking into account the questioning on the performance of students as consumers, a competitiveness-enhancing factors model for a transport company (Fig. 5) can be provided. The most important role is played by analyses of competitors and evaluations of customer satisfaction, which are the criteria allowing the transport company's management to evaluate performance enhancement and to provide these success factors.

In summary, the investigation suggests that the Lithuanian transport companies are aware that in order to remain competitive, they must analyze customer feedback, evaluate it and provide services on demand.

Comparing the activities of competitors, the respondents said that their company continued to adhere to the principles of work and took into account the clients' wishes, complaints and responded to them. Students who participated in the study, identified quality of work, timeliness, competitive price and stable customer base as the main success factors. For the competitiveness enhancement, the respondents suggested the transport companies to continually assess their customer satisfaction and analyze the competitors' activities.

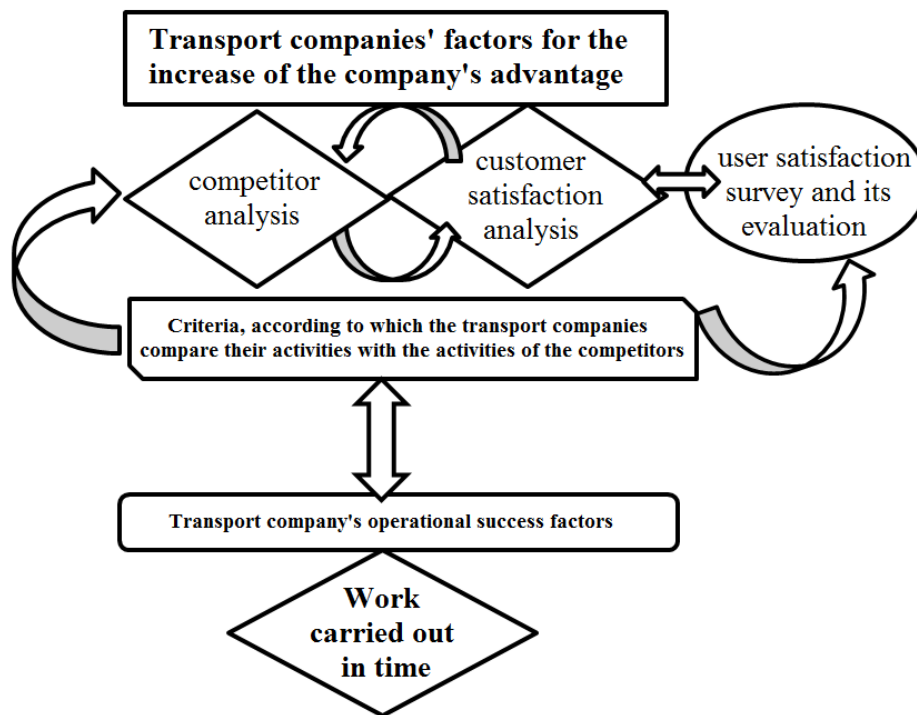


Figure 5 **Competitive advantage model for transport companies** (Ginavičienė & Sprogytė, 2015)

Conclusions

The authors of this paper investigated the competitiveness indicators used by Lithuanian transport companies in students' opinion. The result of the empirical research showed that the most important factors were suppliers, competitors and customers in the Lithuanian transport companies.

The students' opinion research showed that the customer satisfaction evaluated, the competitors' activities analyzed and quality management systems introduced were the factors applied by the Lithuania transport companies in increasing their advantage.

Under the contemporary global market conditions, meeting the consumer needs is mandatory. This is confirmed by the results of empirical research on students' opinions. The survey showed that the Lithuanian transport companies, being in competition with each other and in comparing their own activities, indicated that carrying out the works on time and taking into account the customers' wishes and responses were the main factors of the competitive advantage.

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SOME CASES OF INTEGRATED SOCIAL SERVICES IN POLAND

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Abstract. *In Poland, public operations refer to the European debate on social policy and public policies, which focus on the development of social services and proper public management. An integrated approach to social services is the answer to the need for changes in the attitude to social problems, which require an extensive activity in the public field and the involvement of many organizations and institutions that create networks. This paper presents current experiences in integrating social services in Poland. Mostly, they have a local and testing character, but they are the “starting point” for the reorganization of the social assistance system. The integrated approach emphasizes the need of reorientation in perception of beneficiaries of social assistance, stimulating their activity and targeted public policies so that they take into consideration different lifestyles and needs. The reorganization and management of social policy system should lead to better social service delivery.*

Keywords: *social work, social assistance, social services, integrated approach to social services, social policy.*

Introduction

It is a commonly shared idea that social innovation is the creation of social value by solving social problems (Mulgan, 2013). Accordingly, social innovation can be deemed to be the production of new solutions to social problems in a more effective, efficient, and sustainable way.

Analysing the consequences of the current economic crisis and its impact on daily life, one can find an idea that social innovation can constitute an effective strategy to counter-balance the retrenchment of public social provision (Palley, 2012).

There is a growing body of literature addressing social innovation of social services, closely related to social entrepreneurship and social enterprise (Lettice & Parekh, 2010). However, the literature does not offer a consensus on the different approaches and solutions at a global level (MacLean, Harvey, & Gordon, 2013).

Our opinion is that social problems should be understood in the context of the enormous societal change that is involving the contemporary society.

Information and communication processes play a central role in our society. Computers are affecting human life in a great deal in that they are essential in all life dimensions. An increasing number of actions are made or run by computers and massive amount of multimedia materials circulate through the Internet. In a relatively short period of time, information and communication technology (ICT) has spread worldwide from defence, space and large industry applications, to business, hospitals, education and entertainment. New technologies have thoroughly penetrated into the everyday life, since they not only affect science and business, but also leisure and interpersonal relationships. Accordingly, new social phenomena are affecting our postmodern society: mass urbanisation, social exclusion, high rates of unemployment, environmental challenges, and so on. These challenges cross many boundaries: political, economic, technological and ecological (Bawa & Munck, 2012), and solving those challenges requires designing innovative solutions, mobilising resources collectively and sharing ideas. As emphasised by Howaldt and Schwarz (2010, 5): “[...] problems have in part changed radically and intensified in conjunction with the drastic acceleration of change in the economy, society and culture, and awareness has clearly grown regarding the limited potential that technological innovations and established management and problem-solving routines have to resolve issues”.

This paper aims at illustrating some innovative social services provided in Poland. Our analysis focuses on the state of integration of social services, showing the advantages of an integrated approach.

The research method was designed to support an exploratory analysis based on direct observation and interviews with key persons involved in four different social services. Official documents, including website contents, have been examined and services’ managers have been interviewed using a semi-structured questionnaire.

Social innovative services in Poland

In Poland, scientific and practitioners’ debates on the role and importance of social services in social policy are relatively new, since for many years, in this country, the traditional approach to social policy dominated both in the social security system and the redistribution of public finances for social purposes. Social services have rarely been analysed as a separate category of social policy. It was a result from the practice of current social policy in Poland where social services were underdeveloped and in the shadow of financial and in-kind benefits. The change in the social policy theory was brought by a large EU project financed by the European Social Fund and conducted by Janusz Korczak Pedagogical University in Warsaw. In the framework of the above

mentioned project named „Socially Responsible University” in the years 2009-2012 under the name „Socially Responsible University”, there was done a translation of the canon of European books from 4 languages, which brought the new perception of social policy in the context of its economization and marketization and new paradigms: active, multi-sector and investment social policy. Additionally, this project prepared several national experts and books on the diagnosis and evaluation of social services in four areas of social policy: social security, mainly in the health system and social assistance, social economy and corporate social responsibility, social work and environmental and employment policies and the labour market. This project, which evidently was pioneering in the context of dissemination of the service-oriented approach in social policy ended with a large international conference in 2011. Without any doubt it initiated, especially among the younger generation of scholars, an interest in the social service approach in social policy. You can notice it today by looking at the title of published papers, where social services are the main axis of analysis (Grewiński & Rymśa, 2011).

Besides the increasing interest in social services as a conceptual category of social policy, increasing attention also focuses on specific issues, including the problems of integrating social services in order to improve the quality and individualization of benefits and in order to promote the efficiency and effectiveness of welfare interventions. The integration of services has been discussed in Poland since 2007, when the Ministry of Labour and Social Policy organized the first conference on this topic which focused on dissemination of a well-known report of a British author Brian Munday on integrated social services (Munday, 2007).

The cited report pointed out that the term “integrated social services” usually includes a “range of approaches or methods for achieving greater coordination and effectiveness between different services to achieve improved outcomes for service users” (Munday, 2007). However, as the authors point out, forms of integration can be very different: such as coordination of services, cooperation, partnership, structural integration. Many times these terms are used as synonyms. A similar approach is presented in the report “Integrated social services in Europe” prepared by the European Social Network; instead of focusing on definitional aspects, the publication exposes the main objective of creating an integrated services package to help people achieve lasting, positive social goals throughout their lives. The report refers to the provisions of the Social Investment Package, an indication of the European Commission to priorities in public policy for social investment principles and modernization of the welfare state.

Thus, it ought to be emphasized that in Poland discourse on social services refers to the European debate on social policy and the wider public policies. In

this case, the development of social services is seen as a chance for more efficient and more effective provision of assistance (Grosse, 2008). It especially concerns the context and the message contained in the Green and White Book on Services of General Interest, which was developed by the institutions of the European Union a decade ago. Although, as we wrote above, in the academic scholarly discussion and among social activists, issues concerning social services are present for several years, however, the current integration of services in Poland is an experimental (innovative) practice rather than a systemic one (Grewiński & Lizut, 2012).

Academicians and social activists, especially from the third sector, recognize a need that contemporary social problems require an extensive response in the public sphere and the involvement of many actors and institutions that create networks. There is a need for reorientation of the approach towards the recipients of the assistance and directing public policies that take into account different lifestyles and needs of beneficiaries and its administration and management would foster the development of the integrated social service system. In Poland, we have unfortunately seen far-reaching disagreement between the functioning of public policies, research proposals and social demands relating to these issues. The lack of a platform for cooperation causes a situation when the present system of support is divided into many smaller systems (relating to particular problems or issues: health, labour market, social assistance). There is a lack of programming, management and coordination of services at local and regional level (Grewiński & Lizut, 2012), as seen from the perspective of the customer. There is also a lack of a long-term approach to social issues, recognition of the importance of continuity and coherence in public policies. We can also observe low engagement of policy makers who see social policy in terms of spending, and not from the perspective of social investment (Kościołek, 2012).

The available studies and expert opinions suggest that the current social policy is not only ineffective, but above all it does not bring positive outcomes. Most customers use cash benefits support; however, the amounts do not have a significant impact on improving the living conditions of recipients. According to data from the Central Statistical Office, households benefiting from external assistance (other than the traditional channels of support), most often use financial assistance (86% of all benefiting from external aid), more rarely in-kind support (51%) and the least popular is the form of services - 9% of those clients who are benefiting from external aid.

Services are provided simultaneously in several systems (for instance: services for the unemployed are provided within the social welfare system and the system of labour market policies). Care services are provided in the health care system and social care system and additionally may be supplemented by

monetary benefits derived from the social security system (care allowance) or social care (care allowance) (Mitek, 2013). The main provider of services is the public sector, supplemented by Non-Governmental Organizazions (NGOs) and commercial firms. Many services are highly institutionalized (especially welfare and health), and their availability, quality and price are varied, mainly depending on the place of residence of the customer (Radlińska, 2008).

Within the social welfare system and the labour market, despite considerable investment in these issues, there is a lack of activation solutions, which can fundamentally and permanently change the customer situation. Additionally, organizational and administrative difficulties and deficits of system and legal solutions, which should work towards cooperation of different providers, in reality cause a lack of policy coherence and integration: both horizontally and vertically.

Currently one of the most important postulates towards the reforms of public policies is: focus on social services in support systems (social welfare, labour market and health), cross-sector partnership, the cooperation of institutions and organizations as well as the horizontal and vertical integration of services of different systems. Partnerships should contribute to co-ordination of services and benefits. Thus, co-operation is intended to facilitate access for beneficiaries to services and increase the complexity of the offer and cost effectiveness (Grewiński, Karwacki, 2010). Integration should provide individualization and customization of service packages provided to customers.

Selected cases of social service integration in Poland

In this part of article we present examples of the integration of social services in Poland. During the review and description of integrated services we wanted to verify whether they are implemented in a particular model (structural integration, sustainable partnerships, inter-institutional cooperation, multidisciplinary teams), and which experiences are worth for reproduction.

Social Care and Culture Centre in Słupno

First of the case studies provides the overview of changes which took place over the last decade in a small, rural village near Plock, located in the north of Mazovia Region- in Słupno. Thanks to the commitment of an extremely active local leader - director of the Social Welfare Centre - Joanna Augustowska - there was observed a spectacular and innovative for Polish conditions experiment involving the integration of various social services and social activities in the local environment that linked various instruments of intervention which are usually scattered across different systems of social policy. Within the framework

of the Municipal Social Care Centre, which also operated under the name of Social Care and Culture Centre there was a success in integration in the same place of various social services which in Poland usually are provided separately. One-stop integration consisted of variety of services offered including: social assistance, care services, nursing, specialized services related to community social work, reintegration and mobilization of people at risk of social exclusion offered within the system of social economy and activation policy, social work and community social work, educational services for adults and cultural services as part of the process of active integration and organization of local communities (community organizing). In addition, Social Care Centre in Słupno was responsible for distribution of financial benefits and the implementation of family support. Within the Social Care Centre there was created not only a community centre but also the club of social integration, social cooperatives and occupational-therapy workshop and Theatre Group „A było tak.” The centre used very well known in Poland method of community social work which was developed by “CAL Association”. This method focuses on bottom-top stimulation of citizens to be active and social inclusion in the spirit of empowerment. Whole local community started to undergo a change in the process of social integration through participation in numerous educational, cultural and integration events. Except development of personalized social services and cultural events, the centre implemented several innovative projects funded by the European Union. The achievements of the Centre were noticed quickly by the Ministry of Labour and Social Policy, Mazovian Centre for Social Policy and other institutions that started to award and give distinctions for being the best and most innovative Social Care Centre in Poland. Several study visits of various delegations of social workers from across Poland and abroad started to observe the case study on how this integrated model of services and social services works, which in Poland is not common. The centre also received the attention of the media and academia, which described an example of Słupno as the most promising experiment in social policy institution in Poland. Unfortunately, the local elections in 2014 after 10 years of very dynamic development of the Centre in Słupno brought a slowdown in new initiatives. The new mayor and the new government did not share the willingness to go further towards innovation and integration of services. This case study shows also how crucial it is to have a vision and as well provision of adequate leadership for social decision-making processes at the local level, which will not harm the development of such promising experiments and initiatives.

Community Centre Paca 40 – Warsaw

Another example of integration of services comes from the Polish capital - Warsaw. Municipal Office of Capital City Warsaw together with CAL Association finances and conducts for several years in the framework of public-social partnership and interesting initiative for the dwellers of Praga district. This community centre is focused on the integration of a variety of activities, educational and cultural services for various social groups - children and young people, women, the disabled and seniors, as well as all other residents of the district. In the framework of the Centre Paca 40 (CP40) everyone can find something interesting for themselves and their relatives. The recipients of the CP 40 services are both socially marginalized people and regular residents who are willing to join various initiatives. CP 40 offers various activities: sports and recreational, health education, educational (open lectures, training, courses), integration, cultural (theatre, cinema, opera), but also creates the possibility of implementing informal neighbourhood services. Within the centre the Bank of Neighbourhood Services was created which focus on matching of neighbours who exchange different products, services and things without cash (barter exchange). Beneficiaries of CP40 can also receive psychological and legal support there. Also coaching services are provided on the need. There is a Civic Advice Office and Integration Group eFKropka for people with mental and emotional problems. Visitors can also use other facilities such as: computer labs, a kitchen, different professional workshops and occupational therapy. On the site there are organized foreign language courses, computer learning, it is possible to practice yoga and tai chi. Additionally, it is possible to take part in handicraft workshops, poetry meetings or take part in table tennis or dance classes.

Centre Paca 40 is a good practice of integrating a variety of social, educational and cultural activities in one place and efficient coordination of them according to the needs of the participants - residents of the district.

The centre is managed by an experienced non-governmental organization, which is famous not only for educating in Poland, but also for the certification and validation process to stimulate local communities and their active integration in the services and community work, which require special attention. The effectiveness of the Centre is observed not only by the officials of the City of Warsaw to perhaps develop the concept of integrated services in other districts of Warsaw, but also by the mayors of other municipalities who treat CP40 as a signpost for their own social solutions. However, currently, the idea of establishing a similar centre is discussed by the authorities in one of the richest municipalities near Warsaw - Konstancin Jeziorna.

Integrated services for young people – TU PRAGA WAW PL - a local support system implemented under the program ‘Family’

In Warsaw Another interesting project in Warsaw was the integration of services project „TU PRAGA WAW PL”, which was based on the model of the Local Support System submitted as part of the „Family” program for 2010-2020 (*Priority II, Providing assistance to families at risk of social exclusion, Objective 1 - the provision of an integrated range of services within local support system* (www.warszawarodzinna.um.warszawa.pl) . The main objective of the project was equalisation of educational and social opportunities to children aged 7- 18 living in disadvantaged district of Warsaw - Praga North, which is a place with the highest intensity of social problems Warsaw.

According to the report entitled: ‘Teens at risk of social exclusion - their dreams, attitudes and behaviour and the environment in which they grow up,’ 15% of the population of this area received various kinds of benefits and social security benefits (date based on the Centre for Social Welfare). In the total number of 3500 children living in the old part of Praga North, 1700 of them come from families affected by , various pathologies. What is more, about 30% of those children grow up in single-parent families without any regular sources of income, surviving crises. All of that contributes to the formation of marginalization and social exclusion. A high percentage of the population has low professional qualifications (58% of the unemployed are people without secondary education, professional experience and qualifications).

The project has resulted in closer cooperation between non-governmental organizations and public institutions with schools and, as a result, to improve the educational outcomes of children and youth. To develop a comprehensive range of services for this group of customers, a consortium of civil society organizations has been appointed - Alternative Club (Caritas of the Diocese Warsaw-Praga), Group of the Association of Education and Social Association for Change , the Association of Heart for Children and the Society of Friends of Children and supporting institutions.

The platform of cooperation aimed at creating a new standard in service, was not only an entirely simple sum paid by the organization of the potentials and resources, but through interactions led to the development of new services and changes to the entire support system in Praga-North. During the project, the consortium benefited from existing resources available in the district of Praga-North and the capital city of Warsaw. The basic method of cooperation represented interdisciplinary teams (integrated organizations and social services, cooperating in conducting impact of intervention and assistance), operating with respect for the principles of partnership and subjectivity members. In terms of integrating operations and services the project assumed: close cooperation of

partners in planning, implementing and evaluating activities; exchange of experience and raising standards of work; cross-organizational support and undertaking new joint initiatives; integration and animate the local environment; to develop shared standards for support activities; expanding the scope of services according to the needs of the local community; integration of institutions and aid institutions in the region; the use of modern technology in the community work and increasing availability of these technologies for beneficiaries.

The project ‘Territorial quality standards in social services of the public benefit’ and standardization of services

Another project, which can be classified into the category of integrated social services was a project „Territorial quality standards in social services of the public benefit”, which was implemented by the city of Gdynia in cooperation with several organizations gathered in the European Network for the Social Economy REVES in the period from December 2008 to October 2010. In the project a team from Gdynia animated by the Municipal Social Welfare Centre has worked primarily on the preparation of a model of determining the local criteria of the quality of social services.

An important element of the project was to determine, in the participatory formula, the demand for care services provided for the elderly, chronically ill and disabled in their place of residence. Various stakeholders were included to the public consultations: service users, their families, caregivers, volunteers, social workers, coordinators’ careers, representatives of suppliers and authorities, including the authorities of the city. The final product was a ‘Charter of the quality of caring’ (MOPS Gdynia, 2010), used, among others, in operation since 2005 Senior Activity Centre (CAS), whose task is to coordinate activities for seniors, undertaken earlier by various social institutions and the implementation of a comprehensive activation of the elderly (Mitek, 2012). Similar initiatives have been undertaken in other cities included in the Tri-City (Gdynia, Sopot and Gdańsk), ie. ‘Local Welfare Services Standard Sopot 2010’, ‘Standard of care services’- Gdańsk.

Conclusion

Regardless of the fact that our research is limited, it confirms the importance of an integrated approach in developing new effective social services.

In Poland, many public subjects are encouraging the application of integrated approaches that involve public organizations, social entrepreneurs,

and research institutions. There is an increasing number of stakeholders who are persuaded that social innovation can be the key factor for creating and experimenting new models of governance.

The cases we presented in this paper show the importance of three main factors:

- Exchanging of ideas and values between public, private, and non-profit sectors;
- Shifting roles and relationships between business, the government and nonprofits;
- Blending of market-based principles and mechanisms with public and philanthropic support.

Finally, our research has shown that changes in contemporary society can become opportunities for developing new social services: innovation is the driver of economic value, but social change is the driver of social innovation.

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FONDĒTO PENSIJU SHĒMU NOZĪME PENSIJU NODROŠINĀŠANĀ: LATVIJAS UN VECO ES VALSTU PIEREDZE

Importance of Funded Pension Schemes in Provision of Pensions: the Experience of Latvia and the Old EU Countries

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Abstract. During the past 20 years, pension reforms in the EU countries have lowered pension benefits. As a consequence of reforms each person's responsibility for the result has increased. Examples of such reforms are those in Latvia (1995–2001), Germany (2001–2004) and the Netherlands (2004–2010). The essential part of future pension sufficiency is based on funded pension schemes, which are expected to prevent poverty and ensure the replacement of sufficient income in old age.

The government defines a significant role to funded pension schemes. It is important to take into consideration major structural weaknesses in relation to social security. This includes such aspects as security and payment levels, risk management of savings and payment phases, tax implications and necessity of pension plan monitoring. These are all the problems to be solved in order to draw funded schemes as an integral part of retirement security among investors.

This paper investigates the importance of funded pension schemes in securing pension in Latvia and in some old EU countries.

Keywords: pension fund, pension reform, funded pension schemes.

Ievads

Introduction

Vairākās pasaules valstīs izmanto pensiju sistēmu, kura balstās uz „solidaritātes paaudzes” principu, kad pensijas tiek izmaksātas no strādājošo iedzīvotāju obligātiem iemaksājumiem. Šī sistēma rietumu valstīs tiek saukta, kā „Pay as You Go” (PAYG). Šis ir tā saucamais pirmais balsts jeb pamats esošo pensiju sistēmām vairākās valstīs. Kaut gan „pirmais balsts” paliek aizvien nestabilāks. Šī situācija saasinās attīstīto valstu iedzīvotāju novecošanās dēļ, kā rezultātā samazinās darbspējīgo iedzīvotāju skaita attiecība pret pieaugošo pensionāru skaitu (Bovenberg, 2007). Vidējā dzīves līmeņa izmaiņas pieprasa aizvien lielākas pensiju izmaksas. Tādā veidā palielinās valdības pienākumi, kas ir saistīti ar pensionāriem un pieaugošo obligāto pensiju izmaksājumu apmēru jeb valsts tēriņu pieaugumu, finansējot pensiju sistēmu PAYG. Problēmas

risinājums ir pāreja pie daudz mūsdienīgākas un efektīvākas sistēmas – „otrais balsts”, kura pamatojas uz ieguldījumiem un šo aktīvu investīciju iespējām, kā arī iedzīvotāju brīvprātīgo pensiju ieguldījumiem jeb trešo pensiju sistēmas līmeni.

Pētījuma mērķis ir izvērtēt fondēto pensiju shēmu nozīmi pensiju nodrošināšanā Latvijā un atsevišķās ES valstīs.

Pētījuma objekts ir Latvijas, Vācijas un Nīderlandes pensiju sistēmu modeļi.

Izmantojot monogrāfisko pētījuma metodi, tika veikta objekta detalizēta izpēte, balstoties uz plašu literatūras apskatu. Loģiskās analīzes rezultātā tiek teorētiski pētīti pensiju sistēmas darbību ietekmējošie faktori.

Kā informatīvā bāze pētījuma veikšanai ir izmantoti Nīderlandes un Vācijas banku statistikas dati, Finanšu un kapitāla tirgus komisijas un Valsts sociālās apdrošināšanas aģentūras dati. Atsevišķi skaitļi ir iegūti no ekspertiem, izmantojot ziņu aģentūras un interneta resursus. Darba metodoloģisko pamatu veido Latvijas un pasaules vadošo zinātnieku darbi pensiju sistēmu izpētē.

Lielu ieguldījumu ar pensiju sistēmu saistītos pētījumos Latvijā ir sniedzis Edgars Voļskis. 2008. gadā viņš ir aizstāvējis disertāciju par tēmu: “Pensiju sistēmas pilnveidošanās problēmas Latvijā”. Viņam pieder vairāki zinātniski raksti par globālajiem pensiju krīzēm visā pasaulē, par fondētām pensiju shēmām un 2011. gadā izdotā grāmata "Pensiju sistēmas darbības pamatnostādnes".

Pasaules pensiju sistēmu pētnieks ir vācu profesors Axel Börsch-Supan. Viņa pētījumi balstās uz mikro un makroekonomikas ietekmi uz sabiedrības novecošanos un to saistītām problēmām, kā arī uz pasaules pensiju sistēmu reformu jautājumiem.

Globālie pensiju sistēmu modeļi *The global models of pension*

Vairākas industriāli attīstītās valstis pensiju sistēmas pamatā izmanto vienu no organizatoriskajiem modeļiem: angļu – sakšu jeb Beveridža modeli vai kontinentālo – Bismarka modeli. (Borsch-Supan, 2007)

Beveridža modelim ir raksturīgs augsts algas īpatsvars IKP (apjomā no 60 līdz 65%), mērena līdzekļu daļa, kas tiek rezervēta uz obligāto pensiju apdrošināšanu (aptuveni 12-14% no algas apmēra vai 6-7% no IKP), papildus korporatīvie līgumi (nevalstiski) pensijas apdrošināšanai (aptuveni 3-4% no IKP). Kopumā pēc obligātās un brīvprātīgās pensiju apdrošināšanas, vairākumam strādājošo, kuru darba algas apmērs ir tuvu valsts vidējam darba algas līmenim, pensijas apmērs sastāda 50% no pēdējās algas apmēra. Šo valstu pilsoņu personisko ieguldījumu apjoms vecumdienās ir pietiekoši augsts.

Bismarka modelim piemīt (Vācija, Itālija, Austrija, Francija): mazāks algas īpatsvars no IKP (aptuveni 45-50%), augsta rezervējamo līdzekļu daļa obligātajā pensiju apdrošināšanā (10-15% no IKP), kā arī papildus korporatīvo līgumu (nevalstiski) pensiju apdrošināšana (2 -3% no IKP). Pēc obligāto un brīvprātīgo pensiju apdrošināšanas vairākuma strādājošo pensijas apmērs sastāda 70% no vidējā darba algas līmeņa valstī. Šai valstu grupai ir raksturīgi nozīmīgi lieli personisko ieguldījumu apjomi.

Pēdējā laika tendences pasaules valstu pensiju sistēmās ir negatīvi ietekmējušās no iedzīvotāju novecošanās procesa un zemajiem dzimstības rādītājiem. Ir samazinājies darbspējīgā vecumā esošo iedzīvotāju skaits vairumā Eiropas, Ziemeļamerikas un Dienvidamerikas valstīs. Lai rastu risinājumu pieaugošajai krīzei, lielākā daļa valstu, kurās ir novērojama darbspējīgā vecumā esošo iedzīvotāju skaita samazināšanās un kuras pieredzējušas izmaiņas politiskajā un ekonomiskajā sistēmā, 20. gadsimta beigās veica reformas savās pensiju sistēmās un ieviesa 3 līmeņu sistēmu ar papildu 2. un 3. pensiju līmeņiem, kas dod iespēju strādājošiem indivīdiem uzkrāt daļu no saviem sociālās nodrošināšanas maksājumiem savām nākotnes pensijām (Volskis, 2009)

Starptautiskās finanšu pakalpojumu kompānijas Allianz 2014. gadā publiskotajā Pensiju Ilgtspējas Indeksā Latvijas pensiju sistēma atzīta par devīto ilgtspējīgāko 50 pasaules attīstītāko valstu vidū un saņēmusi visaugstāko vērtējumu starp Austrumeiropas reģiona valstīm. Par visilgtspējīgāko pasaulē atzīta Austrālijas pensiju sistēma, otrajā vietā ierindota Zviedrijas, bet trešajā – Jaunzēlandes pensiju sistēma. Nīderlandes pensiju sistēma ierindota 5. vietā, bet Vācijas – 6. vietā. (2014 Pension Sustainability Index)

Allianz pētījums veikts, analizējot valstu demogrāfisko situāciju, pensiju sistēmas modeli un tā finansējuma avotus. Salīdzinājumā ar iepriekšējo pētījumu, kas tika veikts 2011. gadā, Latvijai izdevies savas pozīcijas uzlabot par divām vietām.

Latvijas pensiju sistēmas modelis *The model of pension system of Latvia*

Latvijā ir izveidota un darbojas trīs līmeņu pensiju sistēma, ko reglamentē „Valsts fondēto pensiju likums”. Mūsdienās 3 līmeņu pensiju sistēma ir viena no efektīvākajām un progresīvākajām pensiju sistēmām pasaulē, to ir pierādījusi pensiju sistēmas prakse attīstītajās Eiropas Savienības valstīs. Tās galvenais mērķis ir radīt finansiāli stabilu un efektīvu, uz individualizētām sociālās apdrošināšanas iemaksām balstītu pensiju sistēmu, kas nodrošinātu tādu pensiju apjomu vecumdienās, kas atkarīgs no iepriekšējā laika periodā veiktajām iemaksām un tādējādi veicinātu sociālās apdrošināšanas iemaksu palielināšanos.

Latvija bija viena no pirmajām valstīm Centrālajā un Austrumeiropā, kas uzsāka daudzlīmeņu pensiju sistēmas ieviešanu un pirmā valsts pasaulē, kas ieviesa uz kapitāla uzkrāšanas principiem balstīto nefondēto paaudžu solidaritātes pensiju shēmu. Šīs sistēmas fundamentālais mērķis bija dot iedzīvotājiem pārliecību un ekonomiskās garantijas, ka viņu dzīves līmenis un dzīves kvalitāte vecumdienās nebūs apdraudēta sociālo vai ekonomisko satricinājumu gadījumos. (Adamsons, 2010)

Tā ir apdrošināšanas sistēma, kurā apvienota katra cilvēka personiskā ieinteresētība savu vecumdienu nodrošināšanā un paaudžu solidaritāte. Pensiju sistēmas galvenais princips: jo lielākas sociālās apdrošināšanas iemaksas tiek veiktas šodien, jo lielāka būs pensija rīt. Visu trīs līmeņu pastāvēšana vienlaikus nodrošina pensiju sistēmas stabilitāti, jo izlīdzina katrā līmenī iespējamo demogrāfisko vai finansiālo risku, kas piemīt katram no šiem līmeņiem.

Visos trīs līmeņos pensijas apmērs ir atkarīgs no veiktajām iemaksām, tādējādi tie, kas iemaksā vairāk jeb atliek pensionēšanos uz vēlāku laiku, iegūst lielākus ienākumus pensijas vecumā. Kopīgā iezīme ir arī tā, ka visos trīs līmeņos šīs iemaksas tiek uzkrātas (nosacīti vai tieši), pelnot procentus un veidojot pensijas kapitālu.

Pensiju sistēmas 2. līmenis tika ieviests 2001. gada 1. jūlijā. Šī līmeņa ieviešana plaši tika diskutēta speciālistu aprindās, kā arī masu informācijas līdzekļos. Par labu fondētajam pensiju līmenim tika izvirzīti 2 galvenie argumenti, kas arī noteica 2. līmeņa realizācijas uzsākšanu.

Kā pirmais iemesls par labu fondētās pensiju shēmas ieviešanai bija plānota demogrāfiskā situācija, jo tuvāko 10 gadu laikā prognozēja demogrāfiskās noslodzes koeficienta samazināšanos un darbaspējīgā vecuma iedzīvotāju skaita palielināšanos. Kopumā tas uzlabotu situāciju pensiju sistēmas 1. līmenī un ļautu novirzīt daļu no obligātajām sociālajām iemaksām uz fondēto pensiju shēmu.

Kā otrs iemesls par labu fondētajām pensijām tika minēts tas, ka 2. līmeņa uzkrājumi var nodrošināt augstāku aizvietoējuma likmi, nekā 1. līmeņa pensija. Pensiju kapitāls tiks investēts finanšu tirgū un no finanšu tirgus instrumentiem tiks gūti ienākumi, kas palielinās kopējo pensijas kapitālu un attiecīgi arī aizvietojamību. Aprēķinu dati liecināja, ka ieguldījumiem finanšu tirgū būs augstāka atdeve nekā inflācijas procents un vidējais algas pieaugums, kas tieši ietekmē 1. līmeņa pensijas. Līdz ar to pensijas palielinājums būs jūtamāks 2. līmenī nekā 1. līmenī. (Adamsons, 2010)

Pēc Valsts sociālās apdrošināšanas aģentūras datiem 2014. gada beigās valsts fondēto pensiju shēmas līdzekļus pārvaldīja septiņi privātie līdzekļu pārvaldītāji, piedāvājot dalībniekiem 20 ieguldījumu plānus. Dalībnieku skaits sasniedzis 1 miljonu 249 tūkstošus. Kopējais uzkrātais kapitāls shēmā 2014. gada beigās bija 2 miljardi un 9 miljoni eiro. Valsts fondēto pensiju līdzekļu pārvaldītāji ir nodrošinājuši vidējo ienesīgumu 5,25 procentu apmērā. Latvijā

bija ieguldīti 669,2 milj. eiro, jeb 36,1% no visiem ieguldījumiem (Valsts sociālās apdrošināšanas aģentūra)

Fondēto pensiju shēmas dalībniekiem, kuri sasnieguši vecumu, kas dod tiesības saņemt vecuma pensiju, 2013. gadā uzsākts piedāvāt jaunu pakalpojumu - valsts fondēto pensiju shēmā uzkrāto kapitālu izmantot dzīvības apdrošināšanas (mūža pensijas) polises iegādei, noslēdzot dzīvības apdrošināšanas līgumu, tādējādi paplašinot izvēles iespējas fondētajā pensiju shēmā uzkrāto līdzekļu izmantošanā.

3. pensiju līmenis Latvijā tika ieviests 1998. gada jūlijā.

Latvijas pensiju 3. līmenī savus pakalpojumus piedāvā privātie pensiju fondi, tomēr papildus tiem arī uzkrājumus pensiju vecumam var veidot ar uzkrājošās dzīvības apdrošināšanas vai citu finanšu uzkrājumu veidu palīdzību.

Privātie pensiju fondi ir viens no būtiskākajiem valsts ekonomikas stabilitātes rādītājiem, kas nodrošina iedzīvotājus pret ienākuma samazināšanos, beidzot aktīvās darba gaitas, un saglabā tiem vēlamo labklājības līmeni arī pensijā.

Pēc Finanšu un kapitāla tirgus komisijas datiem uz 2014. gada beigām Latvijā darbojas 6 privātie pensiju fondi, kas piedāvā 18 dažādus pensiju plānus. Kopumā pensiju 3. līmenī uzkrājumus veido 234 985 dalībnieki jeb 18,8% no pensiju 2. līmeņa dalībnieku skaita. Uzkrātā pensiju kapitāla vērtība sasniedza 280,7 miljonus eiro. Visu pensiju plānu vidējais 1 gada ienesīgums – 5,33% gadā. Latvijā bija ieguldīti 33% no kopējiem aktīviem (Finanšu kapitāla tirgus komisija)

2014. gada vidū stājās spēkā grozījumi likumā „Par privātajiem pensiju fondiem”, kas precizēja kārtību, kādā privātās pensijas kapitālu var nodot norādītai personai (labuma guvējam) pensiju plāna dalībnieka nāves gadījumā. Līdz ar to gan dzīvības apdrošināšanas uzkrājumiem, gan pensiju 2. līmeņa mūža polišu uzkrājumiem ir nodrošināta līdzvērtīga uzkrājumu mantošanas kārtība.

2015. gada 1. janvārī mainījās kārtība, kā fondēto pensiju shēmas līdzekļu pārvaldītāji ietur maksājumus par ieguldījumu plāna pārvaldīšanu, nosakot, ka līdzekļu pārvaldītāja ieturētie maksājumi sastāv no maksājuma pastāvīgās daļas viena procenta apmērā no ieguldījumu plāna aktīvu vidējās vērtības gadā un mainīgās daļas, kas atkarīga no ieguldījumu plāna ienesīguma. Maksājuma mainīgā daļa netiek ieturēta, ja ieguldījumu plāna ienesīgums pārskata gadā ir bijis zemāks par triju mēnešu EURIBOR likmi. Līdz ar Saeimas veiktajām fondēto pensiju likuma izmaiņām pensiju fondu pārvaldītāji ir motivēti nodrošināt pienesumu nākotnes pensionāriem.

Vācijas pensiju sistēmas modelis *The model of pension system of Germany*

Pensiju sistēma Vācijā sāka veidoties 19.gs. sākumā tā ietvēra sevī tikai valsts apdrošināšanu, bet pēc Lielā Tēvijas kara papildinājās ar ražošanas un privāto sistēmu.

Vācija ieņem otro vietu pēc iedzīvotāju skaita, kuri ir vecāki par 65 gadiem. Ceturtā daļa Vācijas iedzīvotāju – pensionāri.

Vācijas pensiju sistēmu modelis raksturīgs Austrijai, Itālijai, Francijai un vairākām citām Rietumeiropas valstīm. Kopumā Vācijas vecumdienu nodrošināšanas sistēmas raksturojas ar dažādu atsevišķu sistēmu līdzpastāvēšanu. Mūsdienās šīs dažādās sistēmas ievērojami atšķiras viena no otras, piemēram, pēc apdrošināto personu loka, pēc finansēšanas principiem un pakalpojumu pabalstu sniegšanas, organizācijas struktūras, kā arī aizsardzības līmeņa, uz kurām tiecas šīs struktūras. Neskatoties uz esošām ievērojamām atšķirībām, pensiju sistēma Vācijā raksturojas kā trīs pakāpju sistēma.

Uz pirmo līmeni attiecas tās atsevišķās sistēmas, kuras funkcionē uz likumdošanas normām un ir obligātas noteiktam personu lokam. Vācijā kopumā ir 4 tāda tipa obligātās sistēmas:

- likumā noteiktā pensijas apdrošināšana jeb sistēma, kura ir obligāta strādājošiem un ierēdņiem, kā arī noteiktām pašnodarbināto kategorijām (piemēram, mākslas darbinieki, publicisti un individuālās ražošanas speciālisti, mājsaimnieki utt.);
- ierēdņu pensijas nodrošināšana, kura ir obligāta valsts struktūrās;
- palīdzība fermeriem vecumdienās, kura nosaka obligātu sistēmu visiem fermeriem, kā arī viņu ģimenēm;
- pensijas nodrošinājums pēc profesijas grupām, kura ietver sevī obligātu sistēmu brīvo profesiju pārstāvjiem (ārsti, aptiekāri, veterinārārsti, arhitekti utt.).

Uz otro pensiju apdrošināšanas līmeni attiecas vecumdienu nodrošinājums no uzņēmumiem. Tie, kuri strādā lielos uzņēmumos, saņem klāt vēl arī korporatīvo jeb darba pensiju. Šīs pensijas saņemšana ir iespējama, ja uzņēmumā ir izveidota pensiju kase, par kuru abpusēji ir vienojušās gan arodbiedrība, gan administrācija. Darba pensija ir atkarīga no darba devēja peļņas un darbinieka stāža. Tās var būt ne tikai algas, bet arī prēmijas, dāvinājumi un atvaļinājuma izmaksas. Korporatīvās pensijas ieguldīšanas princips ir labi uzskatāms – vai darba devējs patstāvīgi izveido finanšu uzkrāšanas fondu saviem strādniekiem, vai arī noslēdz līgumu ar organizāciju, kura sniedz šāda veida pakalpojumus. Pēc visām pensiju sistēmas reformām esošais mehānisms palika bez izmaiņām. Galvenais jaunievedums ir tas, ka

pašiem darbiniekiem ir atļauts darboties savas pensijas papildus finansēšanā un svarīgs noteikums korporatīvajā apdrošināšanā ir ieguldījumu saglabāšana kompānijas bankrota gadījumā. Darba pensiju saņem apmēram puse Vācijas pensionāru.

Trešais līmenis- tās ir rūpes par savām vecumdienām ar privātiem līdzekļiem. Uz šo līmeni attiecas visas privāto ieguldījumu kapitāla formas. Tipiskākās privāto pensiju kapitāla formas iekļauj sevī līguma noslēgšanu par dzīvības apdrošināšanu ar mērķi uzkrāt līdzekļus vai individuālā līguma noslēgšana par pensijas nodrošinājumu.

Pensionāra miršanas gadījumā viņam paredzēto valsts pensiju var saņemt sieva vai nepilngadīgie bērni, bet šī pensija būs daudz mazāka. Arī darba devējs bijušā darbinieka pensiju izmaksās viņa ģimenei. Privāto pensiju var novēlēt jebkuram.

Privātie pensiju ieguldījumi palīdz palielināt pensijas apmēru, kuru arvien biežāk izmanto Vācijas pilsoņi. Taču nevar teikt, ka tikai attiecīgā slāņa un ienākuma iedzīvotāji izmanto šos noguldījumus, jo šajās programmās piedalās gandrīz visi iedzīvotāju slāņi. Kopš tā brīža, kad sāka parādīties problēmsituācijas valsts pensiju sistēmā, papildus apdrošināšanās paliek aizvien populārāka iedzīvotāju vidū. Tiek izmantoti dažādi apdrošināšanas veidi, kuru rezultātā tiek uzkrāti naudas līdzekļi, piemēram:

1. dzīvības apdrošināšana – iedzīvotājs noteiktu laika periodu veic regulārus iemaksājumus, kur termiņam beidzoties, tie tiek izmaksāti kopā ar peļņu no procentu likmes. Ir arī dažādi dzīvības apdrošināšanas veidi: kapitāla dzīvības apdrošināšana vai fondu jeb vērtspapīru dzīvības apdrošinājums. Šajos gadījumos ieguldītie līdzekļi tiek investēti fondos vai akcijās ar mērķi peļņas maksimālai saņemšanai. Privātā pensiju apdrošināšana tiek realizēta pēc tāda paša principa kā „klasiskā” pensija. Tas nozīmē, ka atskaitījumi ir nelieli, bet vienmērīgi (ik mēnesi) noteiktā laika termiņā. Atskaitījumu izmērs ir atkarīgs no tā, cik ilgi tie tiek iemaksāti un kādu ieguldījumu līmeni apdrošinātājs vēlas iegūt, sasniedzot pensionēšanās vecumu.
2. „Ristera” pensija – pēc būtības tas ir privātais ieguldījums, kurš savā ziņā tiek finansēts ar valdības atbalstu. (Ferro, 2009). Lai privāto ieguldījumu pensiju programmā izmantotu valsts līdzekļus, tai ir jāatbilst dažādām prasībām: pirmkārt, tai ir jābūt sertificētai. Otrkārt, lai saņemtu sertifikātu un uzsāktu savu darbību, ir strikti jāievēro vairāki noteikumi:
 - iemaksājumiem uzkrāšanas stadijā ir jābūt nepārtrauktiem un informācijai par uzkrājumu daudzumu ir jāatspoguļojas katru gadu;
 - līguma pārdošana vai nodošana pret ķīlu nav iespējama;

- iemaksājumu summa tiek izmaksāta ne agrāk, kā likumā ir noteikts vai arī ne agrāk par 60 gadiem;
- pāriešana pie citas apdrošināšanas kompānijas iespējama tikai noguldījumu veikšanas stadijā.

„Ristera” pensija var tikt izmantota gan privātajos pensiju ieguldījumos, gan korporatīvo pensiju atbalstam.

2014. gada beigās Vācijā darbojas 142 privātie pensiju fondi. Privātajos pensiju fondos uzkrātā pensiju kapitāla vērtība sasniedza 143,348 miljardus eiro (Fachverband für betriebliche Altersversorgung)

Šobrīd Vācijas pensijas līmenis sastāda apmēram 70%. Tas nozīmē, ka karjeras beigās iedzīvotājs vidēji saņems 70% no saviem iepriekšējiem ienākumiem. Valdības uzdevums šobrīd ir pensiju uzturēšana 64% līmenī. Turklāt ir ieplānots, ka strādājošo ieguldījumu apmērs līdz 2020. gadam nedrīkst pārsniegt 20%, bet līdz 2030. gadam – 22% no algas apmēra. Tādā veidā, papildus finansiālā pensijas nodrošinājuma kopsumma sastādīs ne mazāk kā 70%.

Piemērojamā trīs līmeņu koncepcija, kura sastāv no dažādiem pozitīviem un uzkrājuma veidu elementiem, labi ir ieviesusies šīs valsts praksē. Vācijas pensiju sistēmas pieredze stipri ietekmē vairāku Eiropas valstu attīstītās un formētās pensiju sistēmas.

Nīderlandes pensiju sistēmas modelis *The model of pension system of the Netherlands*

Nīderlandes esošā pensiju sistēma sastāv no divām atsevišķām sastāvdaļām (komponentēm): valsts vecuma pensijas nodrošināšana (AOW), kā arī privātās papildus pensiju shēmas. Privātās pensiju shēmās ietilpst: darba dēvēja brīvprātīgas iemaksas darbinieku labā un privātie personu ieguldījumi.

Saskaņā ar pamata (valsts) pensijas nodrošināšanas sistēmu, katram šīs valsts pilsonim ir tiesības uz pamata pensiju, sasniedzot 65 gadu vecumu. Šīs pensijas apmērs ir atkarīgs no nodzīvotā gadu ilguma šajā valstī, protams, no iepriekšējās nodarbošanās, vai arī dokuments par pensijas iemaksu veikšanu. Šo pensiju avots ir sociālā nodrošinājuma veiktie iemaksājumi, kuri tiek iekasēti pirmās shēmas izmaksu ietvaros pie esošā nodokļa (Duijn et al., 2013)

Lai palielinātu pamata pensijas apmēru, vairākums darba devēju un strādājošo iedzīvotāju iegulda pensiju fondos savus attiecīgos iemaksājumus, kuri nākotnē saņemot pamata pensiju, ļauj saņemt arī uzkrātos papildus līdzekļus. Bieži vien lielākajām firmām ir izveidoti pašām savi privātie pensiju fondi (Philips, Shell, Uniliver). Nīderlandes pensiju fondos tiek uzkrāti iespaidīgi finanšu līdzekļi un tiek uzskatīts, ka šo līdzekļu summa pēc to apmēra ir otrā lielākā visā pasaulē.

Valsts pamata pensija tiek finansēta uz sociālo apdrošināšanas iemaksājumu rēķina pēc pirmās shēmas izmaksu ienākumu nodokļa (pirmās shēmas ietvaros ienākuma nodokļa izmaksas). Pašas no sevis noteikto iemaksājumu summas no nodokļu bāzes netiek izlasītas. Saskaņā ar esošo likumdošanu jebkuram algotajam strādniekam, sasniedzot 60 gadu vecumu, ir tiesības saņemt pensiju, kura sastāda ne vairāk kā 70% no darba algas līdz pensijas vecumam. Savukārt kopējais pensiju iemaksājumu apjoms nedrīkst pārsniegt 2% no gada kopējās algu summas.

Atkarībā no konkrētās pensiju shēmas, kura tiek pieņemta kādā no uzņēmumiem, izmaksu periods tiek noteikts starp darba devēju un darbinieku. Katrā uzņēmumā darbojas sava pensiju shēma, kuras ietvaros tiek regulēti savi noteikumi un iemaksājumu apmērs. Iemaksājumu izmaksas uz vienāda pamata netiek sagatavotas. Taču noteiktās shēmās summas pilnībā izmaksā darba devējs.

Tā kā atšķirīgās pensiju shēmas nenodrošina pietiekoši lielu pensiju apmēru, tad iemaksājumu apmērs pilnīgi tiek izmaksāts pēc nodokļu aplikšanas bāzes. Darba devēju kompāniju iemaksātās summas pensiju uzkrājumos ir pēc standarta 35% likmes no uzņēmuma ienākuma nodokļa. Pensiju iemaksājumi, kuri izmaksāti no algotajiem strādniekiem, tiek izskaitīti no nodokļu aplikšanas bāzes pēc parastā progresīvā personiskā ienākuma likmes, kura sasniedz līdz pat 60%.

Dažos gadījumos pensiju fondi, kuri ir uzkrājuši nozīmīgus finanšu līdzekļus savu nākotnes pensiju nodrošināšanai, neprasa pensijas iemaksu veikšanu noteiktā laika periodā, saskaņā ar noteiktās pensiju shēmas apmēriem. Tas nozīmē, ka īslaicīgā termiņa saistību pagarināšana pensijas iemaksu izmaksāšanā nav saistīta ar darba devēja un darba ņēmēja jebkādiem reālu nodokļu atvieglojumiem. Nodokļu atvieglojumi darbojas, taču tikai tajos pensiju fondos, kuru iemaksām ir noteikts raksturs.

Privātie pensiju fondi pilnībā tiek pakļauti uzņēmuma ienākuma nodokļa aplikšanai. Organizāciju privātie pensiju fondi tiek izmantoti direktoru un lielo akciju kompāniju nākotnes pensiju nodrošināšanai, t.i., galvenokārt tām personām, kuru īpašumā ir 100% akcijas savos uzņēmumos. Tādā veidā iegūtās pensiju fondu iemaksas, kā arī ienākumi vai investīciju ceļā izveidotie personiskie uzkrājumi netiek aplikti ar nodokli. Ar nolūku uzņēmuma ienākuma nodokļa nomaksai pensiju izmaksas tiek izskaitītas no izdevumu apmēra, kuras izskaita no nodokļu aplikšanas bāzes.

Kaut gan darba devējiem ar likumu nav noteikts pienākums piedāvāt pensiju shēmu saviem darbiniekiem, šīs iemaksas ir veiktas vairāk nekā par 95% no visiem darbiniekiem.

2014. gada beigās Nīderlandē darbojas 365 privātie pensiju fondi. Uzkrātā pensiju kapitāla vērtība sasniedza 135 miljardus eiro un tikai 14% no aktīvu

kopsummas tika ieguldīta Nīderlandē. Visu pensiju plānu vidējais 2014. gada ienesīgums – 12,3% (Toezichtgegevens pensioenfondsen). Interessants fakts, ka pēdējo 10 gadu laikā pensiju fondu skaits ir sarucis par 60%. Iemesli ir tādi kā, investīciju un IT izmaksu pieaugums, kā arī stingrāko noteikumu ieviešana.

Secinājumi **Conclusions**

Pēdējo 20 gadu laikā veiktās reformas sociālās drošības jomā viesušas plašas pārmaiņas arī pensiju sistēmas uzbūvē un saturā. Pirmā līmeņa pensiju sistēmas pakāpeniski aizstājuši fondētie instrumenti, piemēram, pensiju fondi un uzkrājošās apdrošināšanas produkti, valsts tiešo pensiju plānu vietā nākuši uz individuālo iemaksu apjomu balstītie pensiju plāni.

Pašreizēja fondēto pensiju shēmu nozīme dažādās ES dalībvalstīs ir ļoti atšķirīga ne tikai attiecībā uz to ieguldījumu pensionāru kopējos ienākumos, bet arī attiecībā uz aktīvo dalībnieku nodrošināšanas līmeņiem, shēmu attīstības pakāpi un uzkrāto fondu lielumu.

Latvijas pensiju sistēmas reforma noslēdzas 2001. gadā. Pensiju sistēmā tika iekļautas valsts fondētas pensiju shēmas. Būtiskā daļa no nākotnes pensiju pietiekamības ir balstīta uz šīm shēmām, no kurām tiek gaidīts, ka tās palīdzēs izvairīties no nabadzības, kā arī nodrošinās pietiekamu ienākumu aizstāšanu.

Latvijas valsts pensiju sistēmu augstais novērtējums Allianz pētījumā saistīts arī ar to faktu, ka ticis palielināts iemaksu apjoms 2. pensiju līmenī, lai kompensētu krīzes laikā samazināto iemaksu apjomu, samazinātu spiedienu uz sociālās apdrošināšanas sistēmu un minimizētu risku, ka, iestājoties pensijas vecumam, iedzīvotāju ienākumu līmenis samazinās zem nabadzības robežas.

Autore uzskata, ka Latvijas daudzlīmeņu pensiju sistēma ir ļoti jauna, salīdzinājumā ar citu Eiropas Savienības valstu realizētajiem pensiju sistēmām. Pensiju fondos nav uzkrāti tik iespaidīgi finanšu līdzekļi kā Nīderlandē un Vācijā. Tikai 18,8% no ekonomiski aktīvajiem iedzīvotājiem veido brīvprātīgos uzkrājumus 3. pensiju līmenī. Tātad Latvijas pensiju sistēmas pilnveidošanai un sekmīgai attīstībai ir vairāki šķēršļi: demogrāfiska, fiskāla un informatīva rakstura.

Pozitīvi vērtējams fakts, ka 33% no privāto pensiju fondu kopējiem aktīviem ir ieguldīti tieši Latvijā, tas sekmē valsts attīstību. Savukārt Nīderlandē tikai 14% no aktīvu kopsummas ir ieguldīti valsts iekšienē, kas jau šobrīd rada diskusijas Eiropas ekonomistu vidū.

Valdībai, piešķirot pensiju nodrošinājumā ievērojumu lomu fondētām pensiju shēmām, jāņem vērā šo shēmu konstrukciju svarīgākās vājās vietas saistībā ar sociālo aizsardzību. Tas ietver tādus aspektus kā nodrošinājums un iemaksu līmeņi, daudzo ar līdzekļu uzkrāšanas un izmaksāšanas fāzēm saistīto

risku vadība, nodokļu ietekme un informācijas un pensiju plānu ienesīguma uzraudzības nepieciešamība. Tās visas ir problēmas, kas jārisina, lai pievērstu fondētas shēmas par neatņemamu pensijas nodrošinājuma sastāvdaļu ieguldītāju vidū.

Summary

The importance of the current funded pension schemes in different EU member countries varies greatly not only in relation to their contribution to the pensioners' total income but also in relation to the active participants' provision levels, level of the scheme development and the size of the accrued funds.

The reform of the Latvian pension system was completed in 2001. State funded pension schemes were included in the pension system. A significant part of sufficiency of the future pensions is based on these schemes which are expected to help avoid poverty and to ensure satisfactory substitution of income.

The non-state pension schemes in the industrially developed countries significantly differ one from the other in structure and scale and in their participation provisions and the size of pension disbursements. The common attribute of the non-state pension schemes of the countries is that they are administered by private entities and the state only establishes the legal framework that allows them to function effectively.

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UZŅĒMUMU MAKSĀTNESPĒJA: TEORĒTISKS IESKATS UN AKTUĀLĀS TENDENCES LATVIJĀ

Enterprise Insolvency: Theoretical Insight and Current Trends in Latvia

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Abstract. *The insolvency of enterprises is an integral element of free market. Since Latvia regained its independence, this problem has been urgent for Latvia's economy as well. It has to be noted that the problem of enterprise insolvency is mainly researched as a separate phenomenon, which could be a strong destructive factor for both the national economy and the economy of an individual business entity. However, there is a methodologically distinctive research direction that associates insolvency with the term enterprise crisis. Anyway, it is important to be aware of real situation characteristics. Therefore, the present research identifies and analyses the theoretical frameworks of enterprise insolvency as well as examines the current situation of insolvency cases in Latvia.*

Keywords: *crisis stages; enterprise insolvency; insolvency tendencies.*

Ievads

Introduction

Kopš Latvijas neatkarības atgūšanas Latvijas uzņēmumi saskārās ar tādu problēmu kā maksātspējas samazināšanās, un brīvā tirgus sistēmai arvien attīstoties, uzņēmumu maksātspējas jautājums Latvijā paliek aktuāls. Finanšu nestabilitāte, kas raksturojama kā aktīvu trūkums saistību dzēšanai, ir nemitīgi un pelnīti Latvijas pētnieku redzeslokā, jo šāda uzņēmumu finanšu nestabilitāte izraisa negatīvu ietekmi gan uz valsts tautsaimniecību kopumā, gan uz atsevišķiem tās subjektiem. Uzņēmuma maksātspējas gadījumā darbiniekiem tiek kavēta vai vispār netiek izmaksāta darba samaksa, piegādātāji nesaņem vai saņem ar kavējumiem maksājumus par sniegtajiem pakalpojumiem un precēm, būtiski tiek kavēti vai vispār netiek veikti maksājumi valsts budžetā. Jo vairāk palielinās uzņēmumu skaits ar reālu maksātspējas problēmu, jo lielāka veidojas neveikto maksājumu ķēde, kas būtiski ietekmē ekonomikas attīstības tempus. Tāpēc ir svarīgi apzināt problēmas praktisko situāciju, pētot aktuālās tendences un nākotnes alternatīvas.

Maksātspēja jeb bankrots ir neatņemams brīvā tirgus elements, kam klasiski tiek piedēvēta negatīvā ietekme, tomēr skatot šo jautājumu metodoloģiski atšķirīgā veidā, ir atzīmējama arī pozitīvā iedarbība, kas,

likvidējot no ekonomikas sfēras uzņēmējdarbības vienības ar neefektīvu darbošanos, palielina strādājošu uzņēmējdarbības vienību pilnveidošanas, uzlabošanas iespējas.

Tādā veidā mūsdienās uzņēmumu maksātspējas problēma paliek aktuāls izpētes lauks un saistošs jautājums gan valsts institūcijām, gan ar uzņēmuma darbību saistītām personām, gan paša uzņēmuma vadībai.

Pētījuma mērķis ir izpētīt uzņēmuma maksātspējas teorētiskās pamatnostādnes, kā arī izvērtēt uzņēmumu maksātspējas situāciju Latvijā.

Pētījuma izstrādē tika izmantota monogrāfiskā jeb aprakstošā metode, statistikas metodes, t.sk., dinamikas rindu analīze, datu grafiskās attēlošanas un analīzes metodes.

Uzņēmumu maksātspējas teorētisko nostādņu pētījumu metodoloģiskās atšķirības

The methodological differences of research in theoretical framework of enterprise insolvency

Jēdziens maksātspēja, izpētot literatūrā un normatīvajos aktos sastopamās šā termina definīcijas, var būt definējams kā uzņēmuma finansiālais stāvoklis, kad tas savlaicīgi nespēj veikt maksājumus un tā saistības pārsniedz aktīvus (Šneidere, 2008), respektīvi - finanšu asimetrija. Šāda situācija rada uzņēmumam vairākus risku faktoros, kas var būtiski ietekmēt tā saimniekošanu, līdz ar to maksātspējas problēma nepārtraukti ir ekonomistu redzeslokā.

Pētot maksātspējas jautājumam saistošo ekonomisko literatūru, var secināt, ka ekonomistu vidū pastāv divi atsevišķi uzņēmumu maksātspējas pētījumu metodoloģiskie paņēmieni.

Šobrīd ir izveidojusies tendence, ka Latvijas pētnieki, ekonomisti uzņēmuma maksātspējas jautājumu skata kā atsevišķu ekonomisko parādību, bieži raksturojot to kā negatīvu un nevēlamu gan visas valsts, gan atsevišķa saimniekojoša subjekta ekonomikai. No šāda skatupunkta uzņēmuma maksātspēju pēta tādi Latvijas pētnieki kā R. Šneidere, I. Genriha un I. Voronova, E. Zelgalve u.c. (Šneidere, 2008; Genriha & Voronova, 2005; Zelgalve, 2005). A. Auziņa un A. Zvirbule-Bērziņa savā pētījumā (Auziņa & Zvirbule-Bērziņa, 2009) analizēja uzņēmējdarbības finanšu krīzi izraisīto ārējo faktoru ietekmes ciešuma sakarību uz uzņēmuma maksātspēju, tādējādi paliekot par Latvijā dominējošā pētījumu metodoloģiskā virziena pārstāvjiem, saista maksātspējas jēdzienu ar uzņēmuma finanšu krīzes jautājumu.

Uzņēmuma maksātspējas jautājuma kā uzņēmuma krīzes pēdējās attīstības stadijas izpēte ir otrs, atšķirīgs pētījumu virziens, kas ir izplatīts ārzemes, īpaši Krievijas autoru darbos.

Uzņēmuma krīzes ir dinamisks process, kas attīstās četrās (dažreiz izdala piecas) pamata stadijās. Teorija piedāvā vairākus uzņēmuma krīzes attīstības modeļus, kur maksātnespēja ir pēdējais procesa etaps, piemēram (Krystek, 1987; Muller, 2001; Окрушко, 2010; Айвазян & Кириченко, 1999):

- V.Mullera modelis (kritērijs-panākumu sasniegšanas potenciāls), izdala stratēģisko krīzi, rezultātu krīzi, likviditātes krīzi un bankrotu;
- G.Kristeka modelis (kritērijs – krīzes pārvarēšanas potenciāls), izdala potenciālo krīzi, slēpto krīzi, asu pārvaramo krīzi, asu nepārvaramu krīzi;
- Z.Aivazjana un B.Kiričenko modelis, kas izveidots uz uzņēmuma iekšējās efektivitātes kritērija un paredz rentabilitātes krīzi, attīstības krīzi, ražošanas krīzi un maksātnespējas krīzi.

Tādā veidā maksātnespēja tiek skatīta kā alternatīvais (nevis neizbēgamais) uzņēmuma krīzes atrisināšanas veids.

Skatot maksātnespējas jautājumu no viedokļa, ka tā ir uzņēmuma krīzes beigu stadija, pētnieki atzīmē arī cita veida (pozitīvo) maksātnespējas ietekmi mikro un makro līmenī, nekā ir pieņemts to definēt klasiskajā izpratnē.

Šobrīd, īpaši pēc 2008. gada finanšu krīzes, ir plaši izplatīts viedoklis, ka uzņēmumu maksātnespēja ir spēcīgs destruktīvs faktors, kas rada finansiālus zaudējumus ne tikai lielai daļai uzņēmumu darbībā ieinteresēto personu, bet plašākos apmēros tā var būtiski samazināt nozaru īpatsvaru iekšzemes kopprodukta veidošanā un negatīvi ietekmēt arī valsts ekonomisko attīstību kopumā (Zelgalve, 2005). Apgalvojumus pamato statistikas dati, kas parāda, ka, piemēram, laikā no 2013. gada janvāra līdz 2014. gada septembrim (nepilni divi gadi) valsts budžeta iestādes un valsts kapitālsabiedrības ir pilnīgi zaudējušas (norakstījušas) aptuveni 434 milj. EUR izbeigtajos maksātnespējas procesos, no tiem 402 milj. EUR ir Valsts ieņēmumu dienesta norakstītie nodokļu parādi. Uz 2014. gada oktobra sākumu aptuveni 603 milj. EUR tika uzskaitīti kā pieprasītās summas neizbeigtajos maksātnespējas procesos, no tiem 359 milj. EUR veido maksātnespējīgo uzņēmumu nodokļu parādi (LR Valsts kontrole, 2015). Salīdzinājumam, 2016. gada iepļānotā valsts budžeta izlietojuma daļa izglītībai veido nepilnus 652 milj. EUR (LR Finanšu ministrija, 2015).

Vairāku pētnieku darbos (Абдуллина & Кучукова, 2013), kuros pētīta uzņēmuma maksātnespēja kā krīzes stadija, tiek apzināta arī tās pozitīvā ietekme:

- uzņēmums pārvar krīzi un stabilizē savu finansiālo situāciju sasniedzot jaunu saimniekošanas kvalitātes līmeni vai arī
- uzņēmums beidz savu pastāvēšanu, kas palielina strādājošu uzņēmējdarbības vienību pilnveidošanas, uzlabošanas iespējas.

Pēc Pasaules Bankas atzinuma (LR Valsts kontrole, 2015), sekmīgi funkcionējoša maksātspējas sistēma spēcīgi ietekmē uzņēmējdarbības vides pozitīvās attīstības dinamiku, valsts pievilcību investoru acīs, un tai ir būtiska loma valsts ekonomikas izaugsmē un ilgtspējā kopumā. Šāda maksātspējas pozitīvā ietekme gandrīz nav pētīta Latvijas autoru darbos, līdz ar to paliek aktuāls jautājums. Svarīgs izpētes lauks paliek uzņēmuma maksātspējas teorētisko pamata nostādņu definēšana krīzes teorijas ietvaros un esošās uzņēmumu maksātspējas situācijas apzināšana Latvijā.

Latvijas uzņēmumu maksātspējas aktuālās situācijas raksturojums *Description of current situation of enterprise insolvency in Latvia*

Uzņēmuma maksātspējas vērtēšanā tiek izmantots visplašākais finanšu koeficientu klāsts – likviditātes un līdzekļu aprites rādītāji, kredītspējas, finanšu stabilitātes un peļņas rādītāji (Zelgalve, 2005). Lai noskaidrotu, vai Latvijas uzņēmumi sastopas ar finansiālām grūtībām, visbiežāk pētnieki piedāvā analizēt tīrā apgrozāmā kapitāla vērtību un dinamiku, izmantot finansiālās atkarības koeficientu jeb saistību īpatsvaru bilancē, autonomijas koeficientu, kas raksturo uzņēmuma finansiālo neatkarību no ārējā finansējuma (Šneidere, 2008; Genriha, Voronova, 2010). Jāatzīmē, ka aprēķinot likviditātes un maksātspējas koeficientus, jāņem vērā uzņēmumā izveidoti uzkrājumi, kas pēc savas ekonomiskās būtības ir saistības, un tie ir jāpieskaita atbilstoši saistību summai (Mietule u.c., 2015; Mietule, 2012), lai nepamatoti nesamazinātu saistību summu.

Autores aprēķinātie, ekonomiskajā literatūrā visbiežāk apskatāmie, Latvijas uzņēmumu maksātspējas rādītāji par laika periodu no 2008. gada līdz 2014. gadam ir apkopoti 1. tabulā un 1.attēlā. Rādītāju aprēķinā tika ņemti vērā Latvijas uzņēmumu veidotie uzkrājumi.

1.tab. Latvijas uzņēmumu maksātspējas rādītāji laika periodā no 2008. -2014. gadam
(autores veidots pēc Centrālā statistikas pārvalde, 2015)

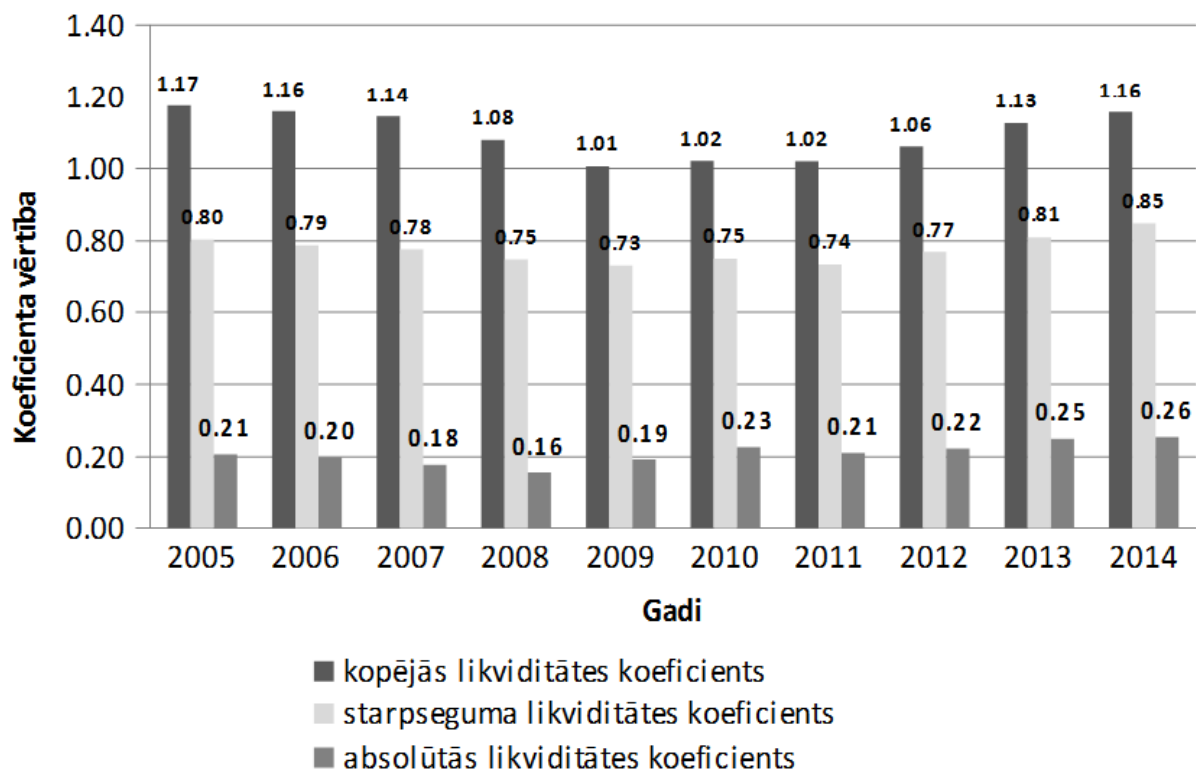
Table 1 Solvency ratios of Latvian companies in 2008 -2014(compiled by the author, based on the Centrālā statistikas pārvalde, 2015)

Rādītājs/Gadi	2008	2009	2010	2011	2012	2013	2014
Tīrais apgrozāmais kapitāls, milj. EUR	20230	17830	18225	18507	19505	19880	20345
Saistību īpatsvars bilancē, %	0.71	0.74	0.72	0.70	0.68	0.66	0.65
Finanšu riska koeficients (saistību attiecība pret pašu kapitālu)	2.44	2.91	2.62	2.38	2.16	1.98	1.89

Ekonomiskajā teorijā tiek uzskatīts, ka saistību īpatsvaram jābūt mazākam par 50%, bet saistību attiecībai pret pašu kapitālu kritiskā robeža ir 1,83 (Genriha & Vrnova, 2010). Latvijas uzņēmumu maksātspējas rādītājiem ir tendence palielināties līdz 2009. gadam, kas liecina par tendenci pasliktināties finansiālajai situācijai. Latvijas uzņēmumu tīrais apgrozāmais kapitāls būtiski, par 12%, krities 2009. gadā, bet kopš 2010. gada atsāka palielināšanos, kas liecina par brīvo līdzekļu pieaugumu. Tomēr, saistību attiecība pret pašu kapitālu visā analizējamajā laika periodā pārsniedz teorētisko robežu, kas liecina par atkarību no aizņemtā kapitāla, un noteikti palielina maksātspējas risku. Saistību īpatsvars bilancē Latvijas uzņēmumiem arī ir virs kritiskās robežas un liecina par zināmu finansiālo atkarību. Tomēr jāatzīmē, ka pēc 2010. gada maksātspējas rādītāji un situācija kopumā salīdzinoši sāk uzlaboties.

Analizējot Latvijas uzņēmumu likviditātes rādītājus par laika periodu no 2005. gada līdz 2014. gadam (1.attēls), jāsecina, ka rādītāji ir tuvi zemākajām vai gandrīz sasniedz (starpseguma likviditātes koeficients) vispārpieņemtās normatīvās robežas.

No 2005.-2011. gadam (izņemot 2010. g.) rādītājiem ir tendence samazināties, un 2008., 2009. gados tie pietuvinājās kritiskajām robežām.



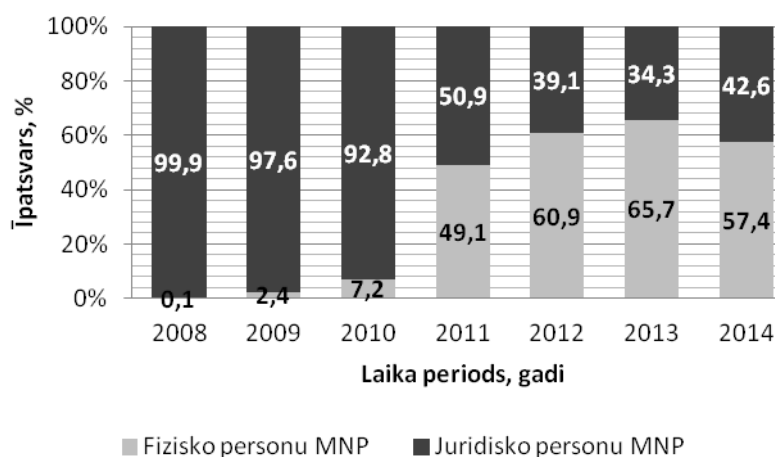
1.attēls. Latvijas uzņēmumu likviditātes rādītāji laikā no 2005. – 2014. gadam (autore veidots pēc Centrālā statistikas pārvalde, 2015)

Fig.1 Liquidity ratios of Latvian companies in 2005 -2014 (compiled by the author, based on the Centrālā statistikas pārvalde, 2015)

Likviditātes rādītājiem ir tendence uzlaboties pēckrīzes gados, kas liecina par labāku situāciju nekā pirms krīzes. 2014. gada kopējās likviditātes rādītājs ir 1,16, starpseguma likviditāte 0,85 un absolūtās likviditāte 0,26.

Analizējot empīriskos datus, vairāki ekonomisti (piem., *E. F. Brigham, L. C. Gapenski*) ir secinājuši, ka papildus tradicionāliem instrumentiem – finanšu koeficientiem – maksātspējas riska identifikācijā liela nozīme ir arī tādiem lielumiem kā, piemēram, uzņēmuma pamatdarbības virziens (nozare), arī tiesiskā forma, uzņēmuma tirgus pozīcijas u.c. (Zelgalve, 2005).

Analizējot kopējo Latvijas juridisko personu pasludināto maksātspējas procesu skaita attīstību laikā no 2008. gada līdz 2014. gadam, var izdalīt divus attīstības periodus: līdz 2010. gadam, kad novērojams salīdzinoši augsts maksātspējas procesu skaits (piem., 2574 procesi 2010.g.) un lieli pieauguma tempi (20% 2010.g.), un pēc 2010.gada, kad 2011. gadā vērojamas lielākās pārmaiņas (samazinājums par 66%, salīdzinot ar 2010.gadu), un ar vidējo pieauguma tempu 3% apmērā turpina pastāvēt maksātspējas procesu skaita pieaugoša tendence.

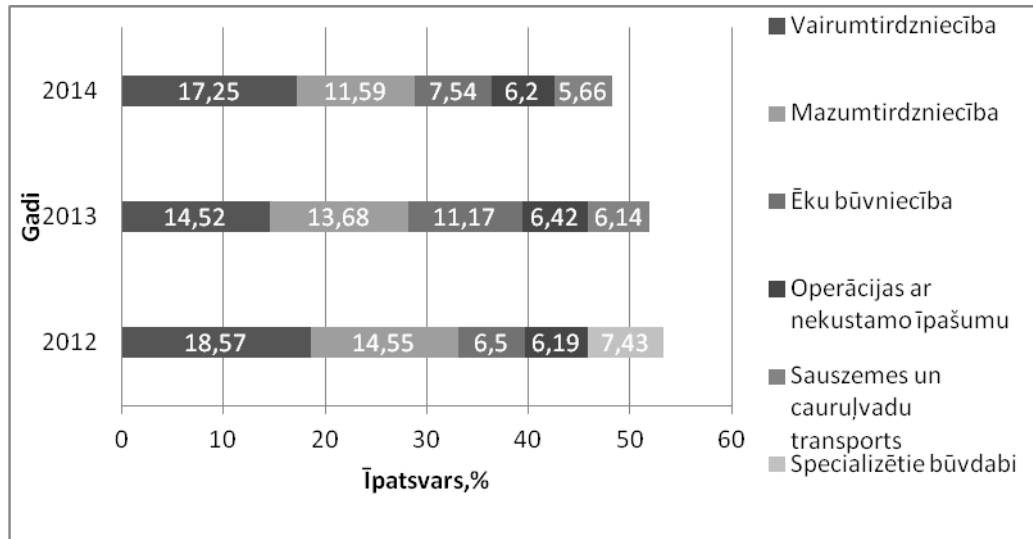


2.attēls. Pasludināto maksātspējas procesu skaita sadalījums pēc lietu rakstura Latvijā no 2008. – 2014. gadam, (%) (autores veidots pēc Uzņēmumu reģistrs, 2015)
 Fig.2 Distribution of proclaimed insolvency cases by category in Latvia in the period 2008-2014, (%) (compiled by the author, based on the Uzņēmumu reģistrs, 2015)

Jāatzīmē, ka, pētot Latvijas juridisko personu pasludinātos maksātspējas procesus kā daļu no kopējā maksātspējas procesu skaita, pēc 2011. gada, var secināt par būtiskām tā īpatsvara pārmaiņām.

Kā parāda 2. attēls, laika periodā no 2008. gada līdz 2010. gadam juridisko personu maksātspējas procesu skaits veidoja lielāku īpatsvaru kopējā pasludināto procesu skaitā (vidēji 97% gadā), savukārt 2011. gadā, skaitam samazinoties līdz 880 procesiem, īpatsvars ir nepilns 51%, un 2012. un 2013. gadā turpināja samazināties, bet ar mazākiem pieauguma tempiem: 23%

un 12% attiecīgi. Uz 2015. gada oktobra beigām juridisko personu pasludināto maksātnespējas procesu skaita īpatsvars veidoja nepilnus 34%, kas ir par 15.5% mazāks rādītājs, nekā par attiecīgo laika periodu 2014. gadā.



3.attēls. Ierosināto maksātnespējas, tiesiskās aizsardzības un ārpus tiesiskās aizsardzības procesu skaita struktūra piecu pārstāvētāko nozaru griezumā Latvijā laika periodā no 2012. – 2014. gadam, % (autore veidots pēc Lursoft.lv, 2015)

Fig.3 Percentage distribution of initiated insolvency, legal protection and extrajudicial legal protection cases for five most represented industries in Latvia in the period 2012-2014 (compiled by the author, based on the Lursoft.lv, 2015)

Lursoft dati no 2012.gada līdz 2014.gadam par uzņēmumu maksātnespēju nozaru griezumā liecina, ka vislielākais īpatsvars maksātnespējīgu uzņēmumu ir tirdzniecības nozarē (mazumtirdzniecība un vairumtirdzniecība) - vidēji 30% (skat.3.att.). Tāpat vispārstāvētāko piecu nozaru sarakstā atzīmējamas ēku būvniecības un operāciju ar nekustamo īpašumu nozares. Kopš 2013.gada ar aptuveni 6% vidējo rādītāju ir arī sauszemes un cauruļvadu transporta nozare. Lursoft dati liecina, ka tirdzniecības nozare ir vairāk pakļauta maksātnespējas riskam.

Pētījumi liecina, ka viena no Latvijas maksātnespējas juridiskās regulēšanas problēmām ir tās būtības izpratne. Ar maksātnespēju vairāk tiek saprasts bankrots un likvidācija, nevis restrukturizācija, sanācija, vai darbības atjaunošana (Bērziņa, 2015). To pierāda statistikas dati (Uzņēmumu reģistrs, 2015), kas rāda, ka Latvijā laika periodā no 2008. gada līdz 2015. gada oktobrim visizplatītākais maksātnespējas stāvokļa risinājuma veids ir bankrota procedūra ar pētāmā perioda vidējo īpatsvaru 99%. Izlīgums un sanācija ir ļoti reti maksātnespējas procesa iznākums, vidējais īpatsvars 0,7% un 0,3% attiecīgi.

Jāatzīmē arī, ka pēdējo piecu gadu laikā turpina attīstīties tāda negatīvā tendence kā izbeigto procesu vidējā ilguma palielināšanās, kas ietekmē arī izbeigto maksātspējas lietu skaita dinamiku. 2.tabula uzskatāmi parāda izbeigto maksātspējas procesu vidējā ilguma straujo palielināšanos kopš 2008. līdz 2014. gadam.

2. tab. Izbeigto juridisko personu maksātspējas procesu vidējais ilgums un skaita dinamika Latvijā no 2008. - 2015. gada oktobrim (autores veidots pēc Uzņēmumu reģistrs, 2015)

Table 2 Average length of terminated insolvency cases and changes in their number for legal entities in Latvia from 2008 to October 2015 (compiled by the author, based on the Uzņēmumu reģistrs, 2015)

Rādītājs/Gadi	2008	2009	2010	2011	2012	2013	2014	2015 (10 mēn.)
procesu vidējais ilgums, mēneši	2.7	7.0	8.6	14.7	23.2	30.1	30.1	24.4
procesu skaits	381	1196	1406	1406	1461	1292	1172	1132

Izbeigto maksātspējas procesu skaits (2.tabula) pēckrīzes gados palielinās un sāk samazināties pēc 2012. gada, kad rādītājs sasniedza vislielāko līmeni jeb 1461 lieta. Par 2015. gada desmit mēnešiem tika pabeigti 1132 maksātspējas procesi, kas ir par 13,2% vairāk nekā par 2014. gada attiecīgo periodu. Un tā ka 2015. gada 10 mēnešu vidējais lietu izbeigšanas ilguma rādītājs (24.4 mēneši) ir mazāks par 16.7% nekā attiecīgā perioda 2014. gadā, var pieņemt, ka sākot ar 2015. gadu, situācija sāks uzlaboties.

Pētot kopējo ierosināto maksātspējas lietu skaitu sadalījumā pēc darbības formas laika periodā no 2008.g līdz 2010.gadam (Uzņēmumu reģistrs, 2015), var secināt kā 95% ir maksātspējas procesi, kas ierosināti sabiedrībām ar ierobežotu atbildību. Nedaudz pāri 1% veido individuālie uzņēmumi, nepilnu 1% - akciju sabiedrības, zemnieku saimniecības un individuāli komersanti katrs. Tāpat, balstoties uz pieejamo statistiku (Uzņēmumu reģistrs, 2015) par laika periodu no 2008. - 2012. gada martam, jāsecina, ka saglabājas tendence, kad vislielākais īpatsvars, aptuveni 39%, ir juridisko personu ierosināto maksātspējas lietu skaitam, kas notika pēc citas juridiskās personas ierosinājuma. Otru lielāko īpatsvaru 28% veido valsts institūciju ierosinātie maksātspējas procesi. Pašu maksātspēju zaudējušo juridisko personu ierosinātie maksātspējas procesi veido 23% no kopējā skaita, pārējie 10% ir citu saistīto personu iniciatīva.

Secinājumi **Conclusions**

1. Latvijā turpina pastāvēt tendence, ka Latvijas autori uzņēmuma maksātspējas jautājumu metodoloģiski skata kā atsevišķu ekonomisko parādību, visbiežāk raksturojot to kā negatīvu un nevēlamu gan visas valsts, gan atsevišķa saimniekojoša subjekta ekonomikā.
2. Ārzemju (īpaši Krievijas) zinātniskajā literatūrā pastāv, atšķirīgs Latvijā esošajam, maksātspējas pamata nostādņu pētījumu virziens, kas paredz uzņēmuma maksātspējas jautājuma kā uzņēmuma krīzes pēdējās attīstības pakāpes izpēti. Šādi pētot uzņēmuma maksātspēju, bieži tiek apzināts ekonomikas atveseļošanas efekts, kas tiek sasniegts, uzņēmumam pārvarot krīzi un izejot kvalitatīvākajā saimniekošanas līmenī, vai „attīrot” uzņēmējdarbības vidi, likvidējot savu darbību. Šobrīd Latvijas autoru darbos šāda maksātspējas ietekme uz ekonomiku netiek pētīta.
3. Pētot Latvijas uzņēmumu maksātspējas un likviditātes pamata rādītājus laika periodā no 2005. gada līdz 2014.gadam, var secināt, ka, izrādot jutību finanšu krīzes 2008. gadā un redzami samazinoties, pēc 2010. gada sāk uzlaboties, bet tomēr paliek teorētisko normu kritiskām robežām tuvi, un liecina par salīdzinoši stabilu situāciju.
4. Analizējot kopējo Latvijas juridisko personu pasludināto maksātspējas procesu skaita attīstību laikā no 2008. gada līdz 2014. gadam, atzīmējams 2011. gads, kad radītājs, samazinoties par 66%, sasniedza 880 procesu skaitu. Sākot ar 2011. gadu ar vidējo pieauguma tempu 3% apmērā turpināja pastāvēt maksātspējas procesu skaita pieaugoša tendence, kas ir redzami lēnāka attīstība, salīdzinot ar 2008. – 2010.gada periodu.
5. Pēdējo piecu gadu garumā būtiski mainījās juridisko personu pasludināto maksātspējas procesu skaita īpatsvars kopējā rādītājā: pēc 2011. gada tas veido aptuveni pusi no kopējo procesu skaita, laikā kad 2008.– 2010. gadu perioda vidējais īpatsvars veidoja gandrīz 97%.
6. Pēdējo četru gadu garumā turpina pastāvēt tendence, ka lielākais īpatsvars (vidēji 30%) maksātspējīgo uzņēmumu nāk no tirdzniecības nozares. Kopš 2013.gada piecu pārstāvētāko nozaru vidū ar aptuveni 6% vietējo rādītāju ir sauszemes un cauruļvadu transporta nozare.
7. Laika periodā no 2008.g līdz 2010.gadam 95% ir maksātspējas procesi, kas ierosināti sabiedrībām ar ierobežotu atbildību, aptuveni 39% ir maksātspējas lietas, kas notika pēc citas juridiskās personas ierosinājuma. Līdz pat 2015. gada oktobrim visizplatītākais maksātspējas stāvokļa risinājuma veids ir bankrota procedūra ar vidējo īpatsvaru aptuveni 99%.

8. Pēdējo piecu gadu laikā turpina attīstīties tāda negatīvā tendence kā izbeigto procesu vidējā ilguma palielināšanās, kas ietekmē arī izbeigto maksātspējas lietu skaita dinamiku. Pēc 2012. gada izbeigto maksātspējas procesu skaitam ir samazināšanās tendence.

Summary

Since Latvia regained its independence, enterprises in Latvia have faced such a problem as insolvency, which, in essence, is the lack of assets to cover outstanding liabilities and, with the free market system developing, remain an integral element of the system. Classically, a negative effect is attributed to this problem; yet, if viewed from a methodologically distinct perspective, it involves also a positive effect that contributes to opportunities for the enhancement and improvement of economically active business entities. For this reason, the research aim is to identify and analyse the theoretical frameworks of enterprise insolvency as well as to examine the current situation of insolvency cases in Latvia.

The research employed general economic and statistical methods, the monographic method and statistical analysis, including time series analysis, studied the special literature and made a number of findings presented further in the text.

A tendency still exists in Latvia that national researchers methodologically view the problem of enterprise insolvency as a separate economic phenomenon, often describing it as negative and undesirable for both the national economy and the economy of an individual business entity. Russian scientific literature deals with a direction of research on the framework of insolvency being different from that in Latvia; it views the problem of enterprise insolvency as the final stage of enterprise crisis. Such an approach to the problem identifies the economic recovery effect that may be achieved if an enterprise overcomes a crisis and shifts to a management level of higher quality or “purifies” the business environment by liquidating its operation. At present, authors in Latvia do not examine such insolvency effects on the economy.

The key solvency and liquidity indicators of enterprises in Latvia, after a considerable decline in the crisis year of 2008, started improving; yet, they still remain close to critical values set by theory. The greatest change in the total number of proclaimed insolvency cases for legal entities in Latvia took place in 2011 when it decreased by 66% compared with 2010. Since 2011, the number of insolvency cases has continued rising at an average rate of 3%. In the past five years, the proportion of insolvency cases proclaimed for legal entities in the total has significantly changed: after 2011, it made up approximately half of the total number of insolvency cases, while in the period 2008-2010 the average proportion was equal to almost 97%. A trend can still be observed that the highest proportion (on average, 30%) of insolvent enterprises is represented by the trade industry. In the period 2008-2010, 95% of insolvency cases were initiated for limited liability companies and approximately 39% were insolvency cases initiated by other kinds of legal entity. Until October 2015, the most widespread solution to an insolvency situation was bankruptcy, which accounted for, on average, 99% of the instances. Over the past five years, the average length of terminated cases tended to increase, which also affected changes in the number of terminated insolvency cases. Since 2012 the number of terminated insolvency cases has tended to decrease.

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PRACTICE OF SMALL AND MEDIUM-SIZED ENTERPRISE PERFORMANCE EVALUATION IN LATVIA

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Abstract. *The total number of small and medium-sized enterprises signifies an essential share of the national economy; SMEs' importance is evaluated by the value added and the new jobs created. Despite the growing research interest in the small and medium business performance measurement, there is no consistent opinion among researchers regarding small and medium business performance indicators, their measurement, and methods of assessment. The research study is based on an analysis of literature and scientific publications, the assessment of the financial indicators used by the Latvian institutions for the company's financial analysis, and an expert survey. The general scientific research methods are used in the research study: information analysis and synthesis, logical construction, monographic, an expert survey, data grouping, and the graphical method. The aim of the research – to carry out an analysis of the performance evaluation practice for small and medium-sized enterprises in Latvia. A study of the small and medium sized business performance measurement and management is carried out and the analysis of the financial indicators used for the performance measurement of small and medium-sized enterprises is performed in the result.*

Keywords: *financial indicators, small and medium-sized enterprises, business performance.*

Introduction

In Latvia, small and medium-sized enterprises (SMEs) have a significant share of the total number of enterprises; they have an essential role in contributing to the gross domestic product and increasing the employment rate. In 2014, the average number of SMEs as a % of the total number of enterprises in the European Union (EU) and in Latvia was 99.8%. SMEs employed on average 66.9% of all private sector employees in the EU and 78.6% in Latvia in 2014. On average, SMEs produced 57.8% of the value added in the EU and 68.8% in Latvia (SBA Fact Sheet. Latvia, 2015). It is evident that the share of the people employed in SMEs in Latvia was by 11.7 percentage points above and the share of output by SMEs by 11 percentage points above the EU average. Overall, the SMEs have an important role in the economy of the EU and Latvia.

Foreign researchers encourage to include both financial and non-financial measurements in SMEs performance evaluation (Bianchi et al., 2013; Watts & McNair-Connolly, 2012).

The research results on SMEs performance (Sousa et al., 2006; Alver & Branten, 2011; Saunila & Ukko, 2011; Keh et. al. 2007) confirm that there are problems in the practical application of indicators, since there is no consistent approach to the identification, measurement, and assessment of financial and non-financial performance indicators.

Despite the fact that the number of publications on the given topic in the scientific literature increases, there is no single opinion among the researchers on the business performance indicators, their measurement, and assessment methods.

The aim of the research is to analyse the practice of the SMEs performance evaluation in Latvia. The object of the research is the assessment of the financial indicators used in SMEs performance evaluation.

The research is carried out based on the analysis of the literature and scientific publications, the assessment of the financial indicators used by the Latvian institutions for the company's financial analysis, and the expert survey.

The general scientific research methods are used in the research: analysis and synthesis, logical construction, monographic, an expert survey, data grouping, and the graphical method.

Measurement and management of SMEs performance

SMEs are considered to be a backbone of economic growth; they contribute to the provision of job opportunities, act as suppliers of goods and services for large enterprises. SMEs are characterized by a number of factors and criteria: location, size, age, structure, organization, number of employees, sales volume, asset value, use of innovation and technologies (Rahman, 2001). SMEs can be described as catalysts of the future economy; hence, it is necessary to accelerate the growth of the SMEs and to improve their competitiveness (Forsman, 2008).

The Bolton Committee established in the UK (1971) has formulated definitions of „economy” and „statistics” of a small enterprise (Tonge, 2001). According to the definition of economy, an enterprise may be considered a small if it meets three criteria: 1) it has a relatively small market share; 2) it is personally run by the owner or co-owner without a mediation of formal management structure; and 3) it is independent and is not a part of a larger company. The “statistics” definition stipulated that the size of a company was determined by the market share and intensity of the competition in the sector.

The subsequent research studies (Storey, 1994; Atkinson & Meagher, 1994) had pointed out the contradictions of the definitions of economy and statistics regarding the owner's ability to manage the company with more than 100 employees on his own, without management structures, as well as regarding

the possibilities to influence the level of market price and to get higher profits with a relatively small market share.

It should be noted that similar SME criteria do not exist in the world. For instance, in the US, it is officially defined that SMEs are enterprises employing between 1 to 500 people. A company corresponds to the small business category if it employs up to 100 workers; it corresponds to the micro-business category if it employs up to 20 workers (Fadahunsi, 2012).

In 1996, the European Commission (EC) adopted the Recommendation 96/280/EC that established the first united definition of SME. The criteria to be used to identify the category of company are number of employees and annual turnover or book value (2003/361/EC). In Latvia, the definition of SME, or business category, is determined by the Regulations of the Cabinet of Ministers of December 16, 2014 (Kārtība, kādā komercsabiedrības deklarē ..., 2014) in accordance with Article 2 of Appendix 1 of the EU Regulation No.651/2014 of June 17, 2014 (Commission Regulation (EU) No 651/2014).

The general guidelines of the Council of Europe regarding small businesses are provided in the European Charter for Small Enterprises: the small businesses are the backbone of the European economy (European Charter for Small Enterprises..., 2000). Latvia joined the European Charter for Small Enterprises on April 23, 2002. The charter stipulates that small enterprises are recognized to be a crucial driving force for the promotion of entrepreneurship, employment, as well as the social and local integration of Europe. Although the European Charter for Small Enterprises was adopted by the Council of Europe in 2000, the principles and lines of action are still vital in 2016, confirming the existence of a number of unresolved issues in the promotion of small business development.

The author, exploring the theoretical aspects of business performance measurement and management (Kotāne, 2015), has concluded that the interest about the performance measurement and management issues has increased during the last two decades; the first studies on SME performance measurement occurred in the second half of the 1990s. In the early 2000s, the SME performance measurement studies were carried out in two directions: (1) adaptation of the performance measurement models designed for large companies and (2) development of specific models for SMEs.

The researchers' opinions on the SME performance measurement differ. There is a view that the majority of SMEs poorly apply performance measurement systems due to the lack of capital and labour resources, stiff competition, and the lack of awareness about the advantages of performance measurement (Barnes et al., 1998; Garengo et al., 2005). SMEs pay more attention particularly to the financial indicators (Massalla, 1994; Monkhouse,

1995) relying mainly on the accounting information and financial measurements (Carpinetti et al., 2008).

The author, assessing the SME performance measurement and management frameworks and the performance measurement practices in SMEs (Garengo et al., 2005; Jamil & Mohamed, 2011; Pihlela & Odunaike, 2012; Taticchi et al, 2008; Cocca & Alberti, 2010; Bianchi et al, 2013; Olaru et al, 2014), has concluded that the course towards merging the financial and non-financial performance perspectives can be observed. However, despite the foreign practices, in Latvia, the assessment of SMEs performance can be carried out using only financial indicators.

Financial indicators of SMEs performance evaluation

Financial performance measurement is a commonly recognized process in the company's management (Chousa & Castro, 2006), because the financial measurements provide important information for investors, financial analysts, auditors, and management, and they are easier to understand (Upadhaya et al., 2014).

Financial indicators used in the research studies on business performance evaluation (Wen et al., 2008; Phillips & Louvieris, 2005; Fernandes et al., 2006; Cardinaels et al., 2010; Shi & Yu, 2013) demonstrate their diversity.

The author believes that, in order to recognize and to assess the significance and role of financial indicators for the effective solving of the company's financial management issues, the problem of establishing a common financial indicator evaluation system for business performance evaluation has to be actuated.

Further, the author will assess the financial indicators used in the business financial performance analysis of Latvian companies, in order to obtain information on the practices of enterprise financial performance assessment in Latvia.

In Latvia, the information about companies' finances can be found in the databases and portals of three institutions: the Central Statistical Bureau of the Republic of Latvia (LR CSB), the „Lursoft” Ltd database, and the CrediWeb portal. The databases are diverse: the LR CSB provides summarised information about companies in general and by the type of activity (Statistics Database (2016); „Lursoft” Ltd provides an opportunity to evaluate the efficiency of potential cooperation partners, competitors, as well as of the own company (Analytical services, 2016); The CrediWeb portal offers online access to the company database in Latvia, providing its clients with the latest information and changes that are being updated at the moment of their registration (CrediWeb products and services, 2016).

The financial indicators used by the LR CSB, „Lursoft” Ltd and CrediWeb for the company’s financial analysis are shown in Table 1.

Table 1 **Financial ratios used for companies’ financial analysis**
(author’s construction based on the Report on the company, 2016, Financial Analysis, 2016, Statistics Database, 2016)

LR CSB	„Lursoft” Ltd	CrediWeb portal
Assets turnover ratio	Accounts receivable turnover, days	
	Payables turnover, days	
	Inventory turnover, days	
Current ratio		
Cash ratio	Quick ratio	
Debt-to-equity ratio		-
Debt ratio	Equity ratio	
Short-term debt ratio	-	-
-	Gross profitability	
Return on assets (ROA)		
Return on equity (ROE)		-
Return on sales (ROS)	-	Return on sales (ROS)

The author has highlighted the financial ratios that are jointly used for companies’ financial analysis. According to Table 1, it can be concluded that the same three financial ratios for the company’s financial analysis are used by all the three above mentioned institutions: current ratio, total debt/ equity ratio, and return on assets ratio. Other financial ratios, except for the total assets turnover ratio, the cash ratio, and short-term debt in the balance ratio, are used by at least two of the aforementioned institutions.

The issue about the development of the specific financial indicators system, which could be used to effectively manage the company's financial situation, is essential to all Latvian enterprises and, particularly, to SMEs. The development of the financial indicators evaluation system is important not only to companies but as well to the government, since these indicators are the basis for comparative analyses by economic sectors and for analytical reports on the financial situation in the country.

Within the research, the expert survey was carried out; five industry experts were interviewed in order to assess the significance of the financial indicators used in financial analysis for the SMEs performance evaluation and to rank them according to the significance on a scale from 1 (the most significant indicator, or priority No. 1 in the SMEs performance evaluation) up to 14 (the least significant indicator, or priority No. 14). The criteria for the experts’ selection were the level of their education (experts C and D were holding a master degree in Economics, experts A, B and E – a doctoral degree in Economics), and

academic and/or professional experience in the field (each of the experts – more than 10 years of experience). Results of the expert discussion are summarized in Table 2.

Table 2 Results of the experts' evaluation
(author's calculations based on the data obtained in February 2016)

Financial ratios	Experts					Sum of evaluation L_i	$d_i = L_i - L_{vid}$	di2	Rank R
	A	B	C	D	E				
	Evaluation								
Current ratio	7	11	13	5	14	50	12,5	156.25	12
Cash ratio	10	10	11	14	13	58	20,5	420.25	13
Quick ratio	14	6	12	6	11	49	11,5	132.25	10,5
Assets turnover, times	13	5	8	13	10	49	11,5	132.25	10,5
Accounts receivable turnover, days	2	8	6	3	7	26	-11,5	132.25	4
Accounts payable turnover, days	4	9	7	4	8	32	-5,5	30.25	6
Inventory turnover, days	9	7	5	10	9	40	2,5	6.25	7
Debt-to-equity ratio	8	14	14	11	12	59	21,5	462.25	14
Debt ratio/ Equity ratio	12	13	9	7	6	47	9,5	90.25	9
Short-term debt ratio in balance	5	12	10	12	5	44	6,5	42.25	8
Gross profitability	3	4	2	8	2	19	-18,5	342.25	3
Return on assets (ROA)	11	1	3	9	4	28	-9,5	90.25	5
Return on equity (ROE)	6	3	4	2	3	18	-19,5	380.25	2
Return on sales (ROS)	1	2	1	1	1	6	-31,5	992.25	1
n=14	m=5					$\sum L_i = 525$	0	$S = 3409,5$	-

The expert opinions were measured by the degree of consensus of the views. In case of the direct parameter evaluation, the degree of consensus of the experts is assessed applying the coefficient of concordance – Kendall's W (Kendall, 1955) using Formula 1:

$$W = \frac{12 \sum_{i=1}^n \left\{ \sum_{j=1}^m r_{ij} - \frac{1}{2} m(n+1) \right\}^2}{m^2 (n^3 - n)} \quad (1)$$

- where, W – coefficient of concordance
- n – number of objects to be ranked
- m – number of experts
- r_{ij} – rank given to object i by expert number j

The value of the coefficient of concordance can vary in the range $0 \leq W \leq 1$; additionally, $W=0$ if there is no correlation between the ranks, and $W=1$ if all the experts have ranked objects equally. It is regarded that an adequate value of the coefficient of concordance is $W \geq 0.50$ when it is considered that the expert consensus is adequately high (Kendall, 1955).

The computed coefficient of concordance $W=0.6$ indicates that the experts have generally been united in their views and have unanimously recognized that the most significant financial indicators for the SMEs performance evaluation are as follows: return on sales (ROS), return on equity (ROE), gross profitability, receivables turnover (in days), return on assets (ROA), payables turnover (in days), and inventory turnover (in days).

A comparison of the financial indicators used by the institutions for the company's financial analysis (Table 1) and the financial indicators ranked by the experts (Table 2) leads to a conclusion that at least two institutions for the company's financial analysis use the same financial ratios indicated as the most important by the experts.

Further research on the use of financial indicators for the SMEs performance evaluation shall be focused on the importance of the indicators in accordance with the aim of the SMEs performance evaluation (financial analysis to attract investments; interest of owners, etc.).

Conclusions

1. The analysis of the SMEs performance measurement and management frameworks and the study on performance measurement practices point out that the direction towards merging the financial and non-financial performance perspectives can be observed. In Latvia, the assessment of SMEs performance can be carried out using only financial indicators.
2. The CSB of Latvia, "Lursoft" Ltd, and the CrediWeb portal equally use the same three financial ratios for the company's financial analysis: cash ratio, total debt/equity ratio, and return on assets ratio.
3. The experts have unanimously recognized that the most significant financial indicators for the SMEs performance evaluation are return on sales (ROS), return on equity (ROE), gross profitability, receivables turnover (in days), return on assets (ROA), payables turnover and inventory turnover (in days).
4. To identify and to assess the significance and the role of financial indicators for the effective solving of the company's financial management problems, it is necessary to develop a common financial indicators system for business performance evaluation.

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EDUCATION AND FUTURE WORK ATTITUDES OF STUDENTS IN POLAND AND LITHUANIA: A COMPARATIVE ANALYSIS

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Abstract. *Increasing the employment among young people is one of the main objectives of the European Union labour market policy. On the one hand, labour market indicators of youths are worse than the ones for the population as a whole. Moreover, the EU countries face NEETs phenomena when young people are not in education, employment and training. Simultaneously, the strong aging process in Europe and demographic changes determine the need for a particular focus on young people who are an important part of future labour force. It is crucial to equip young people with the skills and competencies tailored to the needs of employers, which also would be consistent with the attitudes and expectations of young people. That is why the authors of the paper decided to take into consideration the work and education attitudes of students in two European countries - Poland and Lithuania. These neighbouring EU member states went through comparable historical and political conditions, which influenced their economic situations also in the area of labour market. However, those countries followed different educational reforms. Lithuania implemented basic dual learning and Poland still represents more theoretical orientation in tertiary education.*

The research aim of the paper is to identify the differences in education and future work attitudes of Polish and Lithuanian students. Those differences were diagnosed taking into account: an assessment of own skills for a 'dream' job, perceptions of the impact of environmental factors on a future career, as well as a diagnosis of motivators to work.

The chosen research methods were both secondary data analysis as well as realisation of the primary quantitative research among Polish and Lithuanian students. The survey was conducted among 500 students - roughly in half from each country. The comparison showed large similarities in the factors affecting the motivation of students to work as well as some differences in the perception of the impact of the environment on the future career. The biggest differences among students from two countries were identified in the evaluation of skills needed to find employment.

Keywords: *education and future work attitudes, education and work motivation, skills' assessment, youth's employment, comparative analysis.*

Introduction

The human capital of young people is a significant element of labour force for European markets. This is mainly because of demographic changes and the strong ageing of European society. On the one hand, Europeans are living longer and healthier lives, and subsequent generations can benefit from longer life spans. However, this spectacular achievement of European societies is accompanied by fertility rates below replacement levels and, in a remarkably large number of countries, far under that level (EC, 2014). In 2013 the fertility rate in the EU ranged from 1.21 in Portugal to 1.99 in France (Eurostat, 2015).

Simultaneously young Europeans are eager to improve their education, competencies and qualifications. Those precious resources of human capital in many European countries with a lower standard of living are tempted by lucrative emigration to the neighbouring states of the European Union with better job offers. It is crucial to analyse the young people's expectations in the area of their educational and professional activity to create such conditions in the domestic economies that would encourage the young generation to acquire knowledge and conduct a professional life in the country.

The authors chose for the analysis two European countries - Poland and Lithuania. Both of them can be treated as transition economies with a lower GDP than the EU average as well as with worse access to well paid vacancies.

These neighbouring EU member states went through comparable historical and political conditions, which influenced their economic situations also in the area of labour market. However, they differently shaped systems of education after 1989 (including higher education).

Lithuania implemented basic dual learning and Poland still represents more theoretical orientation in tertiary education.

The research aim of the paper is to identify the differences in education and future work attitudes of Polish and Lithuanian students. Those differences were diagnosed taking into account: an assessment of own skills for 'dream' job, perceptions of the impact of environmental factors on future career, as well as a diagnosis of motivators to work.

The chosen research methods were both secondary data analysis as well as realisation of the primary quantitative research among Polish and Lithuanian students. The survey was conducted among 500 students - roughly in half from each country.

The research findings may help the state authorities to determine the actions to support both employers in creating jobs more receptive to young people and also the educational units to be prepared for organising a successful transition of their students from education into the working environment.

The role of attitudes and motivation in the professional life

Attitudes are evaluative statements - either favourable or unfavourable - about objects, people, or events. In literature attitudes have three components: cognition, affect, and behaviour (Breckler, 1984). The cognitive component of an attitude is a description or belief in the way things are. It sets the stage for the more critical part of an attitude—its affective component. Instead, affect is the emotional or feeling segment of an attitude. Finally, affect can lead to behavioural outcomes. The behavioural component of an attitude describes an intention to behave in a certain way toward someone or something.

Attitudes to work are strongly determined by demographic characteristics, and the age is its crucial element. The significant amount of research has been carried out among the people from generations X and Y diagnosing their attitudes toward work. The current generation of youths represents another attitude to the educational and professional life compared with their older co-workers. The research findings suggest that large generational gaps exist, particularly when it comes to work attitudes. Young people just entering the workforce, often called GenMe or Millennials, are more likely than their elders to value leisure time over work and to place a premium on rewards such as higher salaries and status (Bryner, 2010).

An analysis of educational and work attitudes is strictly connected with professional activity's motivation, as it is the driving force of personal professional growth and is determined by a complex system of internal and external impulses.

According to Robbins and Judge (2009), motivation is a process producing individual intensity, objectives, and perseverance in an effort to achieve a goal.

Motivation is broadly considered as one of the most important predictors of successful entry into the professional life (Valero, Hirschi 2016; Hirschi et al., 2009; Salmela-Aro, Mutanen, Koivisto, & Vuori, 2009).

Such a motivation is often connected with personal proactivity. Being proactive is about taking control to make things happen rather than watching things happen. It is a special type of goal-directed behaviour, which is self starting, anticipatory and change-oriented (Bindl & Parker, 2010). Proactivity is a significant attitude interacting with the professional position. It can enhance workplace performance as well as generate positive outcomes beyond work performance, such as obtaining career satisfaction (Parker et al., 2010).

Work motivation is dependent on many factors which are connected with individuals' personalities as well as their surroundings. Kanfer, Chen, and Pritchard (2008) postulated that progress in work motivation research is needed to have a better understanding of the content of work motivation, an enhanced insight into how motivational constructs and processes operated across the

working life-span and how the context in which people live and work influences the content and function of work motivation. The analysis of two countries such as Poland and Lithuania with, on the one hand, common legacy and comparable past socio-economic conditions during the transition process but with a slightly different choice of development paths on the other, can be an interesting field for the research of context influence on education and work attitudes.

The labour market situation of young people in Poland and Lithuania

After analysing Eurostat labour market indicators for young people in Poland and Lithuania, a better situation among the Lithuanians than the Poles can be noticed. In 2014 both a higher unemployment rate of young people aged 15 to 24 (23.9% in comparison with 19.3% in Lithuania) and the indicator of young people neither in employment nor in education and training - so called NEET (12% for Poland and 9.9 for Lithuania) was recorded in Poland. Simultaneously, the employment rates of youths as well as recent graduates were higher in Lithuania (62.5% and 80.7% respectively, for Poland those indicators reached 60.2% and 75.6%).

The labour market situation of young people is determined not only by the potential of labour demand and the number of vacancies but also the abilities of the education system in terms of providing graduates with the skills needed in the labour market. Such perceived efficiency of education is assured by both adequate levels of financing and reasonable systemic solutions. In 2011, the level of annual expenditure on public and private educational institutions per student compared with GDP per capita at the tertiary level of education was slightly higher in Lithuania (39.2%) in comparison to Poland (38%) (Eurostat, 2016).

However, those countries represent significant differences in the field of system solution implemented in tertiary education. Lithuania has introduced a series of reforms aimed at the liberalization of higher education. They involved enhancing competition between public and private universities, the implementation of liberal instruments, i.e. students' vouchers¹, which changed the financing of higher education as well as increasing the importance of practical orientation of students through the dissemination of dual education (Wołkonowski, 2015). At the same time, the Polish system of tertiary education is considered to be academically driven, and hence insufficiently responsive to the diverse needs of the present-day economy and society (Fulton et al., 2007).

¹ Public authorities introducing the model of students' vouchers received a chance to adapt a stream of future students, admitting more vouchers on the directions important for the development of the national economy.

The research project description and sample characteristics

The empirical part of the paper is a fragment of a research project completed by V. Kumpikaite –Valiūniene et al. (2016) between 2014 and 2015. This project included an online survey administered to business, management or administration students from seven countries, however for the needs of this paper only the statistical material containing the results of a survey conducted in Poland and in Lithuania were used. Questionnaires were prepared according to Analoui's (1993) skills description, Wahba & Bridwell's (1976) and Maslow's motives' presentation (1967) and environment factors described by Daft et al. (1988) in the native language of respondents using the double translation technique. All the instrument are presented in more details by V. Kumpikaite – Valiūniene et al. (2016) The questionnaire contained questions which were aimed to ascertain the attitudes of students regarding their future "dream" job. These attitudes were identified through the prism of three elements: an assessment of own skills gained during college applicable to the "dream" job, perceptions of the impact of environmental factors on a future career, as well as a diagnosis of motivators for work in the future. A four point scale was used to describe motives and the environment, where 0 meant "not important at all", 1- "little important", 2 – "important", 3 – "very important" with another 4 point scale applied in respect to the assessment of skills gained during college where 0 meant "weak", 1- "average", 2- "good" and 3- "very good". The sample consisted of 530 people with 322 (61%) being students from Lithuania and 208 students from Poland. In both groups women were the majority, with 58.1% of Lithuanian students and nearly 56% of Polish students being female.

Research results

The students taking part in the study were asked to assess their skills in the context of finding desired employment after obtaining a degree. The survey questionnaire presented 16 abilities which in their turn were divided into 4 groups: task related, people related, analytical and self related. The research results indicate that the students rated their people related skills the highest. The largest average scores in this group of skills were attained by: the ability to make contacts (a mean score of 2.35), communicability (2.34), the ability to work in a team (2.31) and self-reliance (2.28). Analytical abilities, those which could help with gaining good employment in the future, were rated relatively high but lower than people related skills. Within this group the abilities which attained the highest scores included: a sense of responsibility (a mean score of 2.33) and ability to solve problems (a score of 2.25). Students rated their self-related abilities as well developed but lower than skills classified into groups mentioned

above. In this category of abilities, activity gained the highest mean score (2.15). The students' assessments showed that they judged their preparedness for future employment in the context of task related skills as being the lowest. The average score of all three skills in this group: subject specialized knowledge, experience and the application of experience oscillated around the value of 2.0, while specialty experience was ranked the lowest.

Table 1 **Assessment of skills learned during studies – mean values**
(source: authors' construction)

Mean values	Skills															
	Task related				People related				Analytical				Self-related			
	Subject knowledge	Specialty experience	Application experience	Self-presentation	Ability to make contacts	Ability to show own opinion	Communicability	Ability to work in a team	Self-reliance	Ability to solve problems	Analytical thinking	understanding, ability to plan,	Sense of responsibility	Creativeness	Activity	Tolerance to criticism
Total	1.91	1.70	2.09	2.05	2.35	2.18	2.34	2.31	2.28	2.25	2.12	2.22	2.33	2.14	2.15	2.14
Lithuania	1.97	1.37	1.77	2.12	2.31	2.25	2.27	2.30	2.17	2.18	2.11	2.26	2.16	2.06	2.11	2.47
Poland	1.85	2.02	2.41	1.98	2.39	2.11	2.41	2.32	2.40	2.32	2.13	2.18	2.50	2.23	2.18	1.82

Significant differences were observed between the group of students from Lithuania and those from Poland in respect to the assessment of skills obtained through their college education needed to gain their "dream" job in the future. The students from Poland value such skills as: application experience, specialty experience, self-reliance, a sense of responsibility and creativeness decidedly higher than their peers from Lithuania. In contrast, the Lithuanian students put a higher worth on tolerance to criticism, subject knowledge and goal understanding in terms of preparation for future employment. Skills rated the highest by the students from Lithuania are: tolerance to criticism, ability to work in a team, and understanding goals, the ability to plan, the capacity to analyze results. The Polish students rate a sense of responsibility, communicability and self-reliance the highest (analytical skills). Specialty experience was given the lowest rating by the respondents from Lithuania. The Polish students felt their tolerance of criticism was their weakest point.

The respondents were asked to select factors related to the environment, which influenced their attitudes toward future professional employment. Among the seven factors included in the study questionnaire (health, family/parents, governmental educational policy, economic situation of the country, political situation of the country, education, experience), the highest average value (2.5)

was assigned to the factors connected to health and education. The factors concerning experience were gauged to be slightly less significant (an average value of 2.19) but still very important in shaping attitudes toward work. Aspects such as: economic situation of the country (an average value of 1.99) and family (1.91) were assessed to be moderately important in the process of shaping the attitudes of students toward employment. The influence of governmental educational policy (an average value of 1.46) and the political situation of the country (an average value of 1.61) were ranked the lowest.

Table 2 **Importance of environmental factors - mean values**
(source: authors' construction)

Mean values	Environmental factors						
	your health	family/parents	governmental educational policy	economic situation of the country	political situation of the country	education (back-ground)	experience
Total	2.50	1.91	1.46	1.99	1.61	2.50	2.19
Lithuania	2.47	1.84	1.56	2.03	1.72	2.40	1.90
Poland	2.52	1.99	1.37	1.96	1.50	2.60	2.49

The assessment of individual environmental factors regarding the attitudes toward work was quite similar among the students from both Lithuania and Poland, especially in respect to the factors which were deemed as the most important. The students of both countries decided that health and education were the two most important environmental factors influencing their attitudes toward future work. The difference between the students from Poland and Lithuania emerged in defining the third most significant environmental factor. In the opinion of the students from Lithuania, an important role in shaping attitudes toward future work was played by the economic situation of the country. On the other hand, the Polish students stressed the role of experience in constructing their attitudes connected to employment. In the opinions of the students from both countries participating in the study, the least important factor shaping attitudes toward future work is the political situation of the country.

The students participating in the study were asked to indicate the importance of individual factors concerned with motivation in their future workplace. Elements which were considered during the compilation of a list of motivational factors included those meeting basic needs and social needs as well as the need for growth and self-development. Motivational factors were divided into groups. The first set contained an attractive salary and attractive working conditions, while the second consisted of good work atmosphere, an understanding supervisor, good interpersonal relations and the wish to belong to some social group. The third group of factors incorporated a quick career,

prestige of a workplace, possibility to be promoted, possibility to use your skills and knowledge as well as self-expression. The importance of these elements in a future workplace, as well as the mean values of the answers chosen by all the students participating in the study has been presented in Table 3.

Table 3 Importance of motivation factors - mean values
(source: authors' construction)

Mean values	Motivation factors										
	Basic needs		Social needs				Growth needs				
	Attractive salary	Attractive work conditions	Good work atmosphere	Understanding supervisor	Good interpersonal relations	Wish to belong to some social group	Quick career	Prestige of workplace	Possibilities to be promoted	Possibility to use your skills and knowledge	Self-expression
Total	2.66	2.66	2.57	2.34	2.35	1.37	1.37	1.79	2.12	2.47	2.16
Lithuania	2.63	2.66	2.60	2.41	2.38	1.55	1.86	1.87	2.54	2.60	2.37
Poland	2.69	2.66	2.54	2.27	2.33	1.19	1.67	1.71	1.69	2.34	1.94

Looking at the average scores produced by the students, material aspects (those fulfilling basic needs) connected with future work turned out to be the most important group of motivational factors. The results of the research showed that within the group of social motivational factors, the element connected with good working atmosphere (a mean score of 2.57) as well as the related factor of good interpersonal relations at work (an average of 2.35) were especially highly regarded. Another social motivational factor which was a very significant motivator for students was to have an understanding supervisor (an average score of 2.34). The notion of wishing to belong to some social group turned out to have less relevance to the participants (an average of 1.37). The third group of factors influencing the students' motivation toward employment included those elements connected with fulfilling their need for self-development. Within this group of factors, a very significant role in motivating the students at work was played by the possibility to use your skills and knowledge (a score of 2.47) as well as the ability to express yourself through the realization of working tasks (an average score of 2.16). After analyzing the differences in assigning importance to individual factors motivating students toward future professional employment, it could be noted that they are not very clear cut. The students both from Lithuania as well as from Poland admitted that their motivation toward employment would be connected with material factors such as attractive working conditions and salary level. According to them, good working atmosphere, a factor being social in character, plays an important role in

building motivation for work but it is less significant than material issues. The Lithuanian students also point to the possibility to use their own skills and knowledge as a factor that is equally important as good working atmosphere in the process of shaping their attitudes to work. For both groups, the least significant motivator is the wish to belong to some social group.

Conclusion

The research conducted among students from Poland and Lithuania exposed some differences in attitudes toward future professional employment. These differences are especially apparent in relation to the assessment of their own skills gained during the course of study. The students from Poland feel that they are decidedly better prepared for employment than their peers from Lithuania when it comes to: application experience, specialty experience, self-reliance, a sense of responsibility and creativeness. In contrast, the Lithuanian students assess their skills of tolerance to criticism, subject knowledge and goal understanding in terms of preparation for future employment higher than their Polish counterparts.

When we consider the division of skills into task related, people related, analytical and self-related, it could be concluded that the students from Poland most highly value those skills from the first three categories, while the students from Lithuania those from the last group – self related.

When it comes to motivation as an element of attitude toward future employment, it could be noted that material factors are the most important motivator for the students of both countries. However, it is clearly visible that the students from Lithuania put greater emphasis on motivational factors connected with satisfying their social needs and those concerning self-fulfilment.

The smallest differences in attitudes toward future employment between the students from Poland and Lithuania occur in perceiving the influence of individual environmental elements on their future professional career. However, the factor concerning experience was much more important for the Polish than Lithuanian students in shaping their attitudes toward work. The experience in general seems to be a crucial determinant of young Poles' future work attitudes.

The above research findings indicate the workplace expectations of tertiary education graduates in the analyzed countries. Beside the financial motivation, they greatly appreciate the prospects of getting experience in Poland and possibilities of self-fulfilment in Lithuania.

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VIETĒJĀS IDENTITĀTES PĀRTIKAS PRODUKTA NOVĒRTĒJUMS GASTRONOMISKĀ TŪRISMA ATTĪSTĪBĀ RĒZEKNES PILSĒTĀ UN NOVADĀ

Evaluation of Local Identity Food in the Development of Gastronomic Tourism in Rezekne City and County

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Abstract. *The number of tourists increases every year, and it is necessary to improve the quality and quantity of tourism products. The importance of gastronomic tourism in today's society and the necessity of its development in regions are determined by the market rules and principles. Developing gastronomic tourism in Latgale region will introduce competitive products in the border area of Latvia and will decrease the effect of being a remote part of the country; also, infrastructure will be improved in its counties that would contribute to the development of the region in the future. The aim of this paper: to evaluate local identity food in the development of gastronomic tourism in Rezekne city and county.*

Keywords: *gastronomic tourism, local identity, Latgale region.*

Ievads

Introduction

Tūrisms mūsdienās ir viena no strauji augošām nozarēm. Pēc Pasaules Tūrisma organizācijas datiem tūristu skaits ik gadu kopš 2010.gada pieaug par aptuveni 4% (World Tourism Organization, 2016). Valstis, reģioni, pilsētas un citas administratīvās teritorijas konkurē savā starpā, lai piesaistītu pēc iespējas lielāku tūristu skaitu. Tajā pašā laikā tūrists kļūst arvien „prasīgāks” gan attiecībā uz pašu produktu, gan arī pakalpojuma sniedzēju. Rezultātā tūrisma produktu piedāvājums tiek kvalitatīvi un kvantitatīvi uzlabots, lai apmierinātu pieprasījumu.

Sabiedrība nepārtraukti attīstās un tehnoloģiskais progress arvien vairāk sāk ietekmēt katra cilvēka ikdienu, nosakot dzīvesveidu, pieprasījumu, attieksmi pret lietām un vērtībām. Bet neskatoties uz to ir pierādīts, ka sabiedrība attīstās pēc cikliskuma principa (vēsturisko ciklu jeb kultūras ciklu teorija). Šis princips ir vērojams arī pārtikas nozarē.

Sabiedrības pirmsākumos cilvēki izmantoja naturālo saimniekošanas formu, kad sev nepieciešamo pārtiku cilvēks izaudzēja, nomedīja vai salasīja.

Evolūcijas un tehnoloģiskā progresa rezultātā, mūsdienu sabiedrība, izmantojot zinātniskos atklājumus dažādās nozarēs, spēj mākslīgi „radīt” produktus (ģenētiski modificētie organismi; minerāli un ķīmiskas vielas, kuras veicina ražīgumu; ķīmiski „radīti” kāposti u.c.). Tas dod iespēju apgalvot, ka mūsdienu sabiedrībā var „radīt” gandrīz visu. Tomēr pakāpeniski ir vērojama jauna tendence: sabiedrība ir „nogurusi” no progresa, ko apliecina pieprasījuma pieaugums pēc dabiskiem, ekoloģiski tīriem pārtikas produktiem (Leitis, 2012). Mainoties sabiedrības paradumiem, pieaug pieprasījums pēc vietējiem pārtikas produktiem. Šo tendenci izmanto arī salīdzinoši jauna tūrisma virziena – gastronomiskā tūrisma – attīstībā.

Statistikas dati liecina, ka Latvijā iekšējais pieprasījums pēc vietējiem produktiem samazinās, bet pieaug eksports. Šī tendence ir būtiska gastronomiskā tūrisma attīstībā. Līdz ar to raksta mērķis ir vietējās identitātes pārtikas produktu novērtējums gastronomiskā tūrisma attīstībā Rēzeknes pilsētā un novadā.

Mērķa sasniegšanai izvirzītie uzdevumi:

- Izpētīt vietējās identitātes pārtikas produkta un gastronomiskā tūrisma teorētiskos aspektus.
- Izvērtēt esošo vietējās identitātes pārtikas produktu piedāvājumu Rēzeknes pilsētā un novadā kā pamatu gastronomiskā tūrisma attīstībai.

Pētījuma metodes: zinātniskās indukcijas un zinātniskās dedukcijas metodes, grafiskā metode, sintēzes un analīzes metodes, monogrāfiskā metode, aptauja.

Pētījuma rezultāti ***Results of research***

Jēdziena „vietējais pārtikas produkts” lietošana arvien paplašinās, tomēr nepastāv vienota un oficiāla tā definīcija.

Pētījumiem par vietējo pārtikas produktu izpratni ir pievērsušies daudzi zinātnieki, piemēram, G. Abate (2008), M.D.Anderson (2009), P.Aurier, F.Fort, L. Sirieix (2005), Bahram (2003), M.J.Best, K.L. Wolfe (2009), C.Brown and S. Miller (2008), G.Edwards-Jones (2008), C.E.Carpio and O.Isengildina-Massa (2009), T.Futamura (2007), D.W. Hughes (2007) u.c. Katrs no tiem ir mēģinājis skaidrot jēdzienu „vietējās identitātes pārtikas produkts”. Tomēr, pastāv divas būtiskas problēmas:

- kāds ir produkta ražošanas areāls, lai to varētu saukt par vietējās identitātes pārtikas produktu ;

- vai vietējās identitātes pārtikas produkti ir tie, kas ražoti no konkrētā areālā audzētām izejvielām vai svarīgākais ir ražošanas vieta, neatkarīgi no izmantoto izejvielu izcelsmes.

Par iepriekš minētajām problēmām ir daudz diskusiju, kurās aktīvi iesaistās ne tikai zinātnieki, bet arī ražotāji.

Idejiski jēdziens „vietējais pārtikas produkts” apvieno divus būtiskus aspektus:

- Ģeogrāfisko (Hughes, 2007, Best & Wolfe, 2009, Bahram, 200), P.Aurier, Fort & Sirieix, 200), Abate, 2008, Anderson, 2009 u.c.). Šajā konceptā dominē attālums starp ražotāju un patērētāju. Jaunajā Oksfordas amerikāņu vārdnīcā ir uzsvērts, ka vietējais produkts var būt tāds, kas audzēts vai ražots 100 jūdžu rādiusā. Tomēr tiek uzskatīts, ka šāds skaidrojums neatspoguļo reālo situāciju, jo ir būtiski ņemt vērā arī apdzīvotības blīvumu. Amerikas Savienoto Valstu lauksaimniecības departaments ir noteicis kopējo attālumu, kas ir 400 jūdzes kādā produktu var transportēt no pirmavota vai ražošanas vietas, lai to varētu saukt par vietējo produktu.
- Sociālās un piegādes ķēdes īpašības (Futamura, 2007, Carpio & O.Isengildina-Massa, 2009, Brown & Miller, 200), Aurier, Fort & Sirieix, 2005, Abate, 2008, Anderson, 2009, u.c.). Šajā konceptā ir svarīga ražotāja personība un ētika; lauku saimniecības pievilcība un apkārtējā dabas ainava; visi pārējie faktori, kas veido „stāstu aiz ēdiena”. Īsām produktu piegādes ķēdēm izdevīgums saistīts ar attiecībām starp produktu patērētāju un pārdevēju. Īsām produktu piegādes ķēdēm raksturīgs telpiskais tuvums, kur produkts tiek ražots un tirgots specifiski šim reģionam, un patērētāji ir zinoši par vietējā produkta īpašībām.

Vietējā pārtikas tirgus tipoloģija dalās divos veidos:

- Tiešie darījumi starp ražotāju un patērētāju, kā arī starp ražotāju un restorāniem, mazumtirdzniecības veikaliem un dažādām pašvaldības iestādēm.
- Mazāk formāls vietējās pārtikas avots, kuru ir sarežģīti noteikt, ietver piemājas dārzus un dalīšanos ar kaimiņiem, ogošana, sēņošana, medniecība.

Tā kā šajā rakstā tiek izvērtēts gastronomiskais tūrisms, tad ar vietējās identitātes pārtikas produktu tiks saprasti Rēzeknes pilsētai un novadam raksturīgie ēdieni un dzērieni, kas iekļauti Latgales kulinārā mantojuma sarakstā.

Kulinārā tūrisma jēdziens tiek lietots kopš 20.gs.90.g.b., kad L.Longs (*L.Long, 2004*) izteica ideju, ka tūrista priekšstats par ceļojuma galamērķa kultūru veidojas ar ēdiena starpniecību. Pasaulē gastronomiskais tūrisms ir zināms arī kā „ēdienu tūrisms” (*„food tourism”*), „garšošanas tūrisms” (*„tasting*

tourism”), „gardēžu tūrisms” („gourmet tourism”) un ”kulinārais tūrisms” („culinary tourism”).

Dr.B.Santiča (*B.Santich*) skaidro, ka vēsturiski un etimoloģiski, gastronomija saistās ar padomiem un ieteikumiem par to, ko ēst un dzert, kur, kad, kādā veidā, kādās kombinācijās. To var saprast arī kā „dzīves mākslu”, izmantojot prasmes un zināšanas saistībā ar pārtiku, veikt izvēli, līdz ar to gūt prieku un baudu no ēšanas un dzeršanas (Santich, 2004).

Meklējot skaidrojumu gastronomiskajam tūrismam autore saskārās ar dažādām piedāvātajām definīcijām (skat.1.tabula.).

1.tabula **Gastronomiskā tūrisma definīcijas**
Table 1 Definitions of the gastronomic tourism

Autors	Definīcija	Aspekts
Pasaules pārtikas tūrisma asociācija (International Culinary Tourism)	Nodarbošanās veids ar unikālas un neaizmirstamas ēšanas un dzeršanas pieredzes iegūšanu	Unikalitāte Neaizmirstama pieredze
Tūrisma un viesmīlības terminu skaidrojošajā vārdnīcā (Bērziņa, 2008)	Tūrisma veids, kam galvenais ceļojuma nolūks ir nacionālās virtuves un augstas kvalitātes pārtikas produktu un dzērienu, augstas kvalitātes pavāru pagatavoto ēdienu baudīšana	Nacionālā virtuve Augsta kvalitāte
B. Makkerčera un H. Du Krosas (Makkerčers, & Du Krosa, 2007)	Kultūras tūrisma paveids. Ceļojuma forma, kurā galvenais mērķis ir atšķirīgu, bieži vien nacionāli vai lokāli specifisku ēdienu un dzērienu baudīšana.	Atšķirīgums Specifiskums

Apkopojot 1.tabulā minētās definīcijas, jāsecina, ka gastronomiskais tūrisms saistās ar nacionālu ēdienu un dzērienu baudīšanu, kas ir „unikāli”, „atšķirīgi”, „sniedz neaizmirstamu pieredzi”.

Gastronomiskais tūrisms var tikt organizēts vairākos veidos. Mandriks (Мандрюк, 2011) rakstā „Гастрономический туризм в Германии” norāda, ka gastronomisko tūrisma var piedāvāt:

- **ekskursijās**, kuru laikā piedāvā vīna, alus un vietējo produktu degustācijas. Šādos braucienos tūristi uzzina par nacionālās virtuves tradīcijām, apmeklē alus darītavas, vīna rūpnīcas, konditorejas fabrikas un rūpnīcas.
- **specializētās ekskursijās**, kuru laikā notiek dažādas meistarklases un tūristi iegūst pieredzi no īstiem profesionāļiem. Labākie pavāri stāsta par nacionālo ēdienu pagatavošanu, par virtuves īpatnībām. Ceļotāji

uzzina, kā pareizi izvēlēties produktus, lai radītu garšīgu un oriģinālu ēdienu.

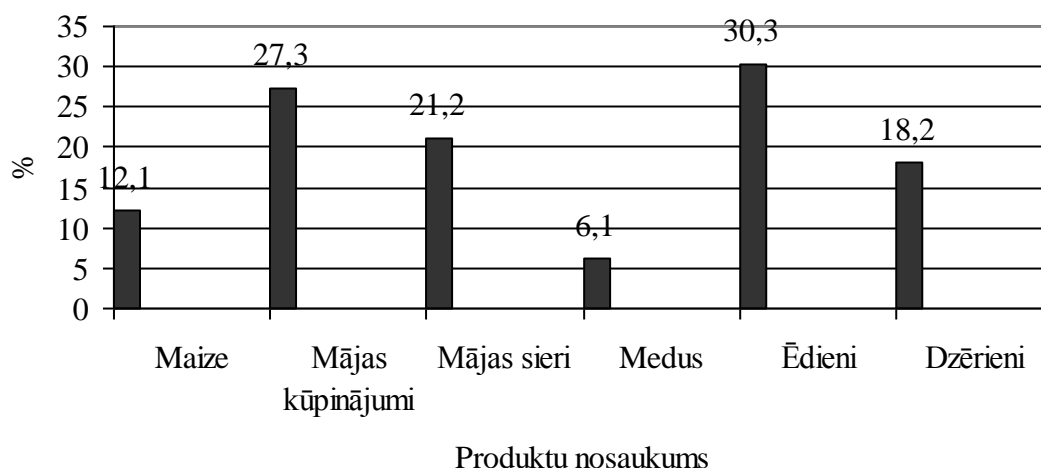
Sekmīga gastronomiskā tūrisma attīstībā būtiska nozīme ir piedāvājumam. Lai izvērtētu vietējās identitātes pārtikas produktu iespējas gastronomiskā tūrisma attīstībā Rēzeknes pilsētā un novadā, autore veica anketēšanu. Respondentu ģenerālkopu veido uzņēmumi, kas sniedz ēdināšanas pakalpojumus Rēzeknes pilsētā un novadā. 2016.gada janvārī Rēzeknes novadā kopumā ir 54 (Latgales reģiona tūrisma informācija, 2016)—lauku tūrisma mītnes, bet ēdināšanas pakalpojumus sniedz tikai 6. 2016.gada janvārī Rēzeknes pilsētā ir 28 (Rēzeknes pilsētas kafejnīcas un restorāni, 2016) ēdināšanas uzņēmumi. Līdz ar to ģenerālkopu veido 34 uzņēmumi. Respondentu aptauja notika laika periodā no 2016.gada 12. – 20.janvārim. Aptaujā piedalījās 33, jo viens uzņēmums nesniedza atbildes uz anketas jautājumiem. Līdz ar to var uzskatīt, ka iegūtie aptaujas dati ir reprezentatīvi un pamatojoties uz tiem, var izdarīt atbilstošos secinājumus.

Anketa sastāvēja no sešiem jautājumiem par Latgalei raksturīgiem pārtikas produktiem, ēdieniem un dzērieniem. Šo kritēriju izvēli autori pamato ar autores I.Silickas jau iepriekš veikto pētījumu (Silicka, Dembovska, 2014), kura gaitā tika izpētītas Dienvidlatgales lauku saimniecību „lauku labumu” piedāvājums.

Respondentiem bija nepieciešams norādīt vai uzņēmums šādus produktus, ēdienus/dzērienus piedāvā, vai pēc tiem ir pieprasījums un kas ir šo produktu pircēji.

Iegūtie dati tika apstrādāti ar SPSS.

Anketā tika iekļauti tie pārtikas produkti, ēdieni un dzērieni, kas ir nosaukti kā Latgales kulinārais mantojums (Culinary Heritage, 2014).



1.attēls. **Produktu piedāvājums Rēzeknes pilsētas ēdināšanas uzņēmumos un Rēzeknes novada lauku tūrisma mītnēs (Respondentu aptaujas dati)**

Fig.1 Product offer in Rezekne catering companies and rural tourism establishments in Rezekne county (Survey data)

Pamatojoties uz aptaujas datiem, jāsecina, ka salīdzinoši neliela daļa respondentu saviem klientiem piedāvā Latgalei raksturīgos produktus, ēdienus un dzērienus.

Visvairāk ēdināšanas uzņēmumi saviem klientiem piedāvā latgaliešu tradicionāli gatavotos ēdienus (krupniks, guļbešniki u.c.). Respondenti anketas komentāros ir minējuši, ka vislielākais pieprasījums pēc latgaliešu tradicionāli gatavotajiem ēdieniem ir tieši ārzemju tūristiem, tātad varam secināt, ka Latgalē par gastronomiskā tūrisma produkta sastāvdaļu kļūst arī paša produkta audzēšana, ievērojot noteiktus apstākļus, šī produkta audzēšanas, iegūšanas un pagatavošanas mākslas demonstrēšana.

27,3% respondentu piedāvā mājas kūpinājumus, kas ir gatavoti no vietējām izejvielām. It sevišķi lauku tūrisma ēdināšanas uzņēmumi, saviem klientiem piedāvā kūpinātas zivis, jo:

- lielākā daļa lauku tūrisma mītņu atrodas pie ūdens tilpnēm un tas dod iespēju salīdzinoši viegli iegūt nepieciešamās izejvielas;
- kūpinātas zivis harmonizē ar viesu mājas atrašanās vietu.

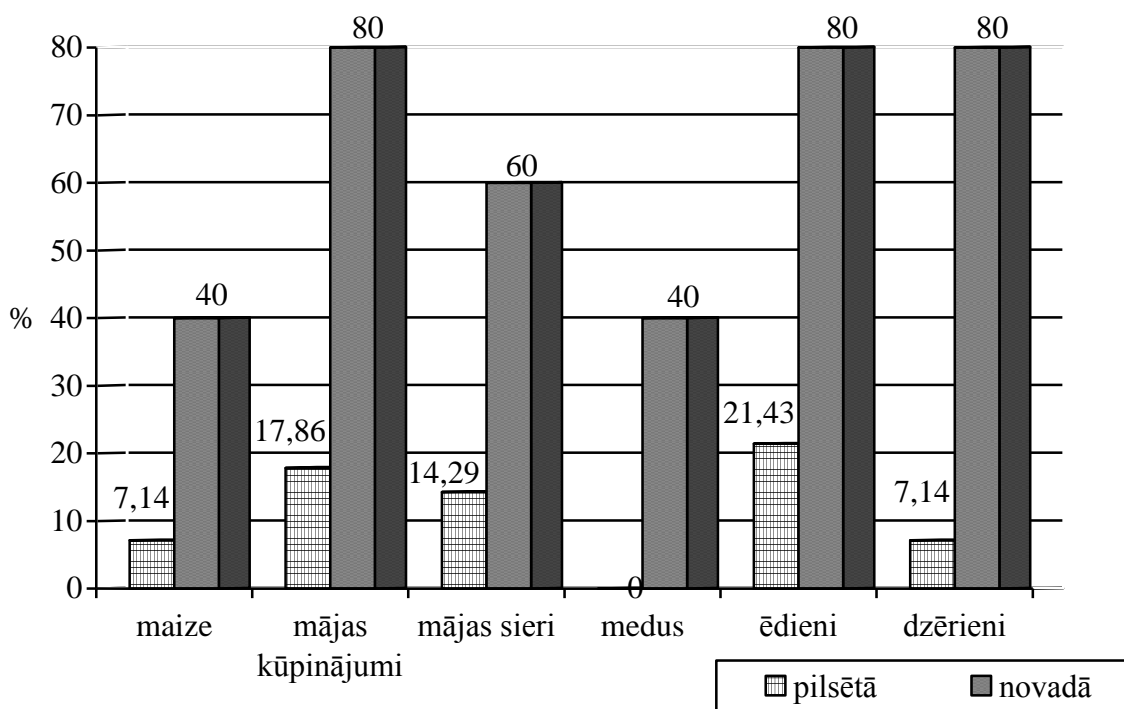
21,2% respondentu saviem klientiem piedāvā mājas sierus, kas ražoti no savās saimniecībās iegūtā piena. Pēc respondentu sniegtajām atbildēm, var secināt, ka ir pieprasījums pēc mājas siera. Mājas sierus piedāvā arī pilsētas ēdināšanas uzņēmumi. Šajā gadījumā jāņem vērā fakts, ko norāda arī daudzi respondenti, ka mājas siers tiek iepirkts no vietējām saimniecībām, kuras nodarbojas ar šāda siera ražošanu.

Tikai 18,2% respondentu saviem klientiem piedāvā tradicionālos dzērienus (alu, šmakovku). Autores uzskata, ka šādu uzņēmumu būtu vairāk, jo paši respondenti atzīst, ka ir pieprasījums. Bet alkoholisko dzērienu ražošanai un tirgošanai ir nepieciešams saņemt speciālu atļauju.

12,1% respondentu cep un saviem klientiem piedāvā maizi pēc senām receptēm. Maizes cepšana ir laikietilpīgs un darbietilpīgs process un rezultātā parasti tiek izcepti vairāki kilogrami maizes. Ņemot vērā, ka tūristu plūsma tomēr ir salīdzinoši neliela un bieži vien arī neregulāra, uzņēmumiem tas ir dārgs pakalpojums, lai maize tiktu piedāvāta kā atsevišķs tradicionāls produkts, bet parasti tiek iekļauta kā viens no produktiem tradicionāli gatavotajiem latgaliešu ēdieniem.

Medus tikai 6,1% no visiem respondentiem ir iekļāvuši savā piedāvājumā. Daudzi respondenti uzsver, ka pieprasījums pēc medus ir ļoti minimāls.

Autores salīdzināja anketas datus par produktu piedāvājumu pilsētas ēdināšanas uzņēmumos un lauku tūrisma mītnēs, kas piedāvā ēdināšanas pakalpojumus (skat. 2.attēls).



2.attēls. Produktu piedāvājums Rēzeknes pilsētas ēdināšanas uzņēmumos un lauku tūrisma mītnēs Rēzeknes novadā (Respondentu aptaujas dati)

Fig.2 Product offer in catering companies in the Rezekne city and rural hostels in Rezekne countryside (Survey date)

Kopumā ir jāsecina, ka vislielākais Latgalei raksturīgo produktu, ēdienu un dzērienu piedāvājums ir lauku tūrisma mītnēs, kas piedāvā ēdināšanas pakalpojumus. Pilsētā ir salīdzinoši daudz ātrās ēdināšanas uzņēmumu, kuru piedāvājums un darbības specifika nav savienojami ar Latgales kulināro mantojumu.

Rēzeknes pilsētas un novada uzņēmumi ir gatavi apmierināt klientu pieprasījumu ar Latgalei raksturīgajiem pārtikas produktiem, ēdieniem un dzērieniem.

Secinājumi un priekšlikumi

Conclusions and suggestions

Respondenti savās anketās ir uzsvēruši vietējo pārtikas produktu izmantošanu. Gadījumos, kad pats ēdināšanas uzņēmums vai lauku tūrisma mītne nesien mājas sierus, tad tie tiek iegādāti pie vietējiem mājražotājiem. Līdz ar to jāsecina, ka uzņēmumu vadītāji izprot, kas ir vietējās identitātes pārtikas produkts. Jo īpaši autores grib uzsvērt to, kas attiecas uz kūpinātām zivīm, kas iegūtas vietējos ezeros un labi raksturo blakus esošās lauku tūrisma mītnes.

Gastronomiskā tūrisma attīstības galvenais priekšnoteikums ir atbilstošs piedāvājums. Jāsecina, ka Rēzeknes novadā ir salīdzinoši daudz uzņēmumu – 54 lauku tūrisma mītnes, bet tikai 11,1% no tiem piedāvā ēdināšanas pakalpojumus. Pilsētā ēdināšanas uzņēmumu ir vairāk, bet Latgalei raksturīgos produktus, ēdienus un dzērienu savā ēdienkartē ir iekļāvuši tikai aptuveni ¼ daļa no respondentiem.

Rēzeknes pilsētā un novadā, lai sekmētu gastronomiskā tūrisma attīstību ir nepieciešams pilnveidot piedāvājumu, padarot to pieejamāku un daudzveidīgāku.

Summary

The number of tourists increases every year, and it is necessary to improve the quality and quantity of tourism products. The importance of gastronomic tourism in today's society and the necessity of its development in regions are determined by the market rules and principles. Developing gastronomic tourism in Latgale region will introduce competitive products in the border area of Latvia and will decrease the effect of being a remote part of the country; also, infrastructure will be improved in its counties that would contribute to the development of the region in the future. The aim of this article: to evaluate local identity food in the development of gastronomic tourism in Rezekne city and county.

Respondents in their questionnaires have emphasized the use of local food products. Business executives understand what local identity foods are. Gastronomic tourism development is possible only if an appropriate offer is made. In conclusion, Rezekne municipality has a relatively large number of companies - 54 rural tourism establishments, but only 11.1% of them offer catering services. Only ¼ of the city's catering companies include Latgale specific products and beverages in their menus.

In Rezekne city and county, to promote gastronomic tourism development, it is necessary to improve the offer, making it more accessible and more diverse.

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TURNOVER OF PUBLIC SECTOR EMPLOYEES AND THE MEDIATING ROLE OF JOB SATISFACTION: AN EMPIRICAL STUDY IN LATVIA

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Abstract. *Public sector reforms in many countries have been related to cost reductions, increased workload and similar issues. Ignoring the impact of reforms on employee job satisfaction may decrease employee engagement and the quality of service delivery. This paper aims to identify the main factors that determine the level of job satisfaction of public sector employees in a developing country and to find out which factors should be addressed first in order to decrease employee turnover. The survey conducted in 2015 included 365 respondents. For data analysis, partial least square structural equation modelling (PLS-SEM) technique is used to test the model and identify the most important factors relevant to turnover intentions. The results indicate a strong relationship between satisfaction factors and intentions to stay. Satisfaction partly mediates the association between career growth possibilities, work environment, attitude of a direct manager, pay as well as social security and intentions to stay. Growth has the strongest total effect on intentions to stay with a public sector organisation. Thus, taking into consideration the cost cuttings and economic situation, career growth and the reward system are the two factors, which should be addressed first. Moreover, pay is the most important factor for the attraction of younger generation employees to the public sector.*

Keywords: *public sector, human resource management, employee satisfaction, turnover, intentions to stay.*

Introduction

Over the last 40 years in Europe and around the world, public sector reforms are an on-going phenomenon. Since the 50`s of the 20th century, public sector developments can be characterized by significantly different features and expressions and we can follow through three main stages. The first is the traditional Public Administration stage (Huges, 2003); since the 1970's until the end of the 1990`s the so-called New Public Management stage followed (Hood, 1991; Turkyilmaz et.al., 2011). The New Public Management (NPM) ideology of treating a government as if it were a business has informed many changes in many countries; however, some argue that it has already become

obsolete. Western scholars call the period since the 1990-ies the New Public Governance (Bovaird & Löffler, 2005; Eliassen & Sitter, 2008; Meuleman, 2008; Pollitt & Bouckaert, 2011). Recently it has been argued that the New Public Governance (NPG) has become the dominant regime of public policy implementation and public service delivery (Osborn, 2010, p. 414).

On the backdrop of all these developments, among primary problems raised by modern public administration there is the question how to respond to developmental changes, how to implement new approaches and modern characteristics of new public management (Cankar & Petkovsek, 2014). The global recession has introduced new public sector reforms in many countries, including cost reductions, restructurings, activities with purpose to increase efficiency and effectiveness, an increased workload, introduction of new management tools like performance management, performance related pay and other similar changes. Public sector reforms are generally aimed at management that is more effective and efficient. The necessity of these reforms may not be questioned. However, ignoring the impact of reform implementation on employee motivation and job satisfaction may decrease employee engagement and the quality of service delivery. This, in its turn, can lead to high turnover in the public sector and even the loss of trust in public administrators.

Latvia, like other post-communist countries in the early 1990s, by launching its administrative reform, had to master the principles of democratic countries' traditional bureaucracies as well as to keep up with the latest modernization trends in public administration. According to recent data on the public sector, the efficiency and management of state-owned enterprises has significantly improved. A public administration efficiency rating expressed from 0 to 100%, which is the highest rating, in Latvia from 61% in 1996 climbed to 76% in 2013, and is well ahead of the National Development Plan control indicator in 2014. Still there is place to grow up to the 2020 target of 85%. According to Global Competitiveness Index (GCI) sub-index "public institutions", Latvia is ranked 52nd out of 144 countries (Schwab, 2015). The single remuneration system in the public administration is mentioned among the brightest state administration reforms. Since the government is also the European Union's priority, the European Commission recommends Latvia to further strengthen the public administration reform, including the implementation of corporate governance reforms. The International Monetary Fund agrees and recommends centralizing the management of state-owned enterprises, while getting rid of the supporting activities (Rutkovska, 2015).

Because of all the reforms and changes, public sector organisations in Latvia feel pressure with regard to delivering high quality services. Public sector organisations have shown increasing interest in introducing various human resource management tools, including employee evaluation and job satisfaction.

The latest becomes especially important because many public sector organisations recently faced a high employee turnover and even a severe lack of qualified employees. In a situation when extrinsic motivators, like pay, are constrained or even reduced, complex approaches become more important. Latvia is not actually investing in public sector research to serve as the basis for different decision-making in public administration. It is necessary to carry out research studies regularly on this nationally important sector and to base decisions on these studies.

This paper presents an empirical study of employee satisfaction and its impact on turnover in a large Latvian public sector organisation. It aims to identify the main factors which determine the level of job satisfaction of public sector employees and identify a variable that might have an impact on turnover intentions of public sector employees, mainly to find out which factors should be addressed first by management in order to decrease employee turnover. The paper explores whether intentions to stay with a public sector organisation can be fostered by the application of such HR practices as support employees receive from the organisation and talent management.

To achieve the aim, the case study strategy was chosen and quantitative data gathered using structured on-line survey. For data analysis, partial least square structural equation modelling (PLS-SEM) technique was used and the model designed.

This research study contributes to HRM literature on several aspects. It is one of the first research studies on the Latvian public sector to investigate turnover intentions; moreover, it is one of few research studies investigating the mediating effect of satisfaction on turnover and the moderation role of age on satisfaction and turnover. The paper is structured as follows. First, theoretical aspects of employee satisfaction and loyalty with respect to public sector specifics are discussed. Relationships between different factors of satisfaction and loyalty are identified and hypotheses related to these relationships are developed. The hypotheses are tested by means of a variance based structural equation model with the Smart PLS software. The paper ends with the evaluation of results, discussion and conclusions.

Theoretical framework and research questions

Many researchers have investigated causes of employee turnover and concluded that turnover intentions heavily depend on human resource management practices and job satisfaction is of utmost importance (Sajjad, et al., 2013). Job satisfaction is in an antecedent to organisational loyalty and intentions to stay (Turkyilmaz, et al., 2011). Job satisfaction has been defined as a positive feeling about one's job. Locke defined job satisfaction as "the

pleasurable emotional state resulting from the appraisal of one's job as achieving or facilitating the achievement of one's job values" (Locke, 1969, p. 316). Gordon defined it as "employee's reaction to what he or she receives from the job" (Gordon, 2011, p. 191).

Previous studies on staff satisfaction and job performance in the profit and public sector organisations have yielded differing results. Therefore, it is essential to focus on the specifics of the public sector organisations. The nature of the job and consequently the feelings of public sector employees are specific. Job satisfaction is an important indicator of how employees feel about their job and, among other things, the predictor of turnover (Kumari & Pandey, 2011). Public sector employees have different job motivations and work values (Turkyilmaz, et al., 2011). Kumar and Pandey (2011) state that in public sector institutions, compared to private sector firms, the organisation and separation of departmental power is very strict. Public sector employees have to exhibit transparency and the objectives are indefinite. Another peculiarity is elected representatives. The public sector has serious extrinsic motivators, such as security of tenure, career development opportunities and the pension system. Quality of life is also identified as an attraction to the public sector, as many people believe it offers better flexibilities if compared with the private sector (O`Riordan, 2013).

Summarising previous research studies on the public sector, several predicting factors of employee satisfaction and intention to stay are commonly used. Attitude of a supervisor or manager, salary, recognition, rewards and promotions, career development and training programmes, working conditions are the most frequently used constructs (Turkyilmaz, et al., 2011; Steijn, 2002; Bodur, 2002; Gupta & Sharma, 2009; Kim, 2009; Cankar & Petkovsek, 2014; Kim, 2002; Yang & Kasseket, 2009; Sajjad, et al., 2013). Taking into consideration O`Riordan (2013), social security should be included. Since the public sector has to work under the "public eye" (Kumari & Pandey, 2011), transparency could be expected also from the organisations. Therefore, the transparency of pay and the award system might be an important factor as well.

All the above-mentioned constructs were included in the research model and the following research questions were formulated:

RQ1: Which constructs are the best predictors of employee satisfaction in the public sector organisations?

RQ2: Which constructs are the best predictors of employee intentions to stay in the public sector organisations?

RQ3: Is job satisfaction a strong mediator? Between which construct and intentions to stay job satisfaction is the strongest mediator?

RQ4: Which factors are the most important determinants of satisfaction and intentions to stay for younger employees?

Data and Methodology

A case study was used to collect the data and one of the largest public sector organisations in Latvia was chosen. This organisation has been reorganised as part of public sector reform and faces both a high employee turnover and a lack of qualified employees. At the end of 2014, the total number of employees was slightly above 4300; however, the total number of job vacancies was more than 300. The organisation constantly faces problems with the attraction of young and prospective employees. The average age of employees in the organisation in 2014 was above 40 years.

The model including nine factors determining employee satisfaction relevant to the public sector and turnover measured by intentions to leave and recommendations to the employer was developed. The survey instrument, a structured questionnaire including 11 constructs with 2 to 6 questions referring to each of them and six demographic type questions, was designed. All items, except overall job satisfaction, were measured on a 4-point Likert-type scale, where 1 = strongly disagree; 2 = disagree; 3 = agree and 4 = strongly agree. The scale does not have a neutral answer, as in the Latvian environment, it is recommended not to use a neutral answer due to the high possibility of receiving too many neutral answers. Below the constructs, their coding, number of corresponding questions and their definitions are described.

Working environment (ENV) is initially measured with 4 statements and refers to physical working environment factors, such as a comfortable and clean workplace, lighting, temperature, office space, technical equipment etc. A sample statement reads, "I am very comfortable with my physical work environment". Career growth potential (GROW) is measured with 4 questions, and this construct measures career development opportunities existing within the organisation and whether employees are informed about them. A sample item forming this scale is "I feel there are good career growth possibilities for me in this organisation". Training and learning (LEARN) with 4 questions measures the quality and applicability of training provided within the organisation. Questions included "Knowledge gained in a training session is applicable to my job". Management (MAN) dimension includes 6 statements and measures the attitude of direct managers towards employees, including respect, a clear explanation of tasks and aims, trust. A sample item from this scale is "My direct manager appreciates my work". Pay (PAY) with 5 questions measures the adequateness and competitiveness of a salary. A sample statement is "My salary is relevant to my contribution". Transparency of Pay system (PAYT) with 2 questions measures the transparency and fairness of the pay system. A statement reads, "I understand the principles of remuneration in the public sector". Bonuses (BON) scale initially had 5 questions and is related to the transparency

and fairness of bonuses. For example, “Bonuses are always given on a fair basis”. Awards (AWAR) dimension with 3 statements measures the transparency and adequateness of monetary awards. For example, “Awards are always based on excellent job results”. Social security (SOC) scale has 3 questions and refers to the perceived competitiveness of the social security package “My organisation ensures a competitive social security package”. Employee turnover is measured as respondents` intention to stay (IS) with 5 questions which refer to willingness to stay in the organisation and willingness to recommend it as a good place where to work. A sample statement is “I am not actively searching for another job”. Overall satisfaction is measured on a 7-point scale where 1 = ‘completely unsatisfied’, but 7 = ‘completely satisfied’. This scale refers to employee satisfaction with the work in the organisation in general and the statement is “Please indicate your satisfaction with your current job”. Some statements in the questionnaire were reversed to match the direction of other statements and scales and avoid confusion.

The survey was conducted electronically in 2015 and included in total 470 respondents. However, quite many of the respondents had never participated in any kind of training, therefore, were not able to answer questions about training and learning. Since this construct, in line with growth possibilities, was initially considered as a very important predictor of intentions to stay, therefore only full questionnaires were retained for analysis. Besides, some questionnaires had missing answers and were excluded from analysis. The final number of observations included in the model for analysis was 365.

Findings and data analysis

For data analysis, variance based structural equation modelling (PLS-SEM) technique was used to test the model and to predict the most important factors relevant to turnover intentions. A particular technique was chosen because it implies the features of multiple regression and does not assume the normality of data distribution, and a K-S test performed with SPSS indicated that data were not normally distributed. Besides, this technique allows including a larger number of indicators and several different scale types (Hair, et al., 2011). The statistical objective of PLS-SEM is to maximize the explained variance of endogenous latent constructs or dependent variables.

The model included two endogenous constructs - IS (intention to stay) and SAT (satisfaction), as well as nine exogenous constructs – ENV (work environment); GROW (career growth opportunities); LEARN (training and learning); PAY (remuneration), PAYT (transparency of remuneration system); MAN (management) and BON (bonuses); AWAR (awards); SOC (social security). All the constructs were measured with reflective type questions.

To evaluate reflectively measured models, the following should be examined: outer loadings (size and significance); composite reliability; average variance extracted (AVE) or convergent validity; discriminant validity (Hair, et al., 2011). In order to do so, the model is designed by means of Smart PLS software and algorithms calculated. Path coefficients and outer loadings of the model are presented in Figure 1.

Outer model results. The outer model shows how correctly each construct is measured or how each set of indicators is related to their latent variable. As seen in Figure 1, all loadings are above the minimum threshold value of 0.708. However, Figure 1 shows the model with already deleted items. Three items (env1, bon4 and bon5) initially had a loading of 0.4, therefore, after examining the questions, it was decided to exclude them from the model. The remaining manifest variables exhibit outer loadings high enough and are a good measure of their latent variables. The bootstrapping procedure was used to determine statistical significance. All the loadings were statistically significant.

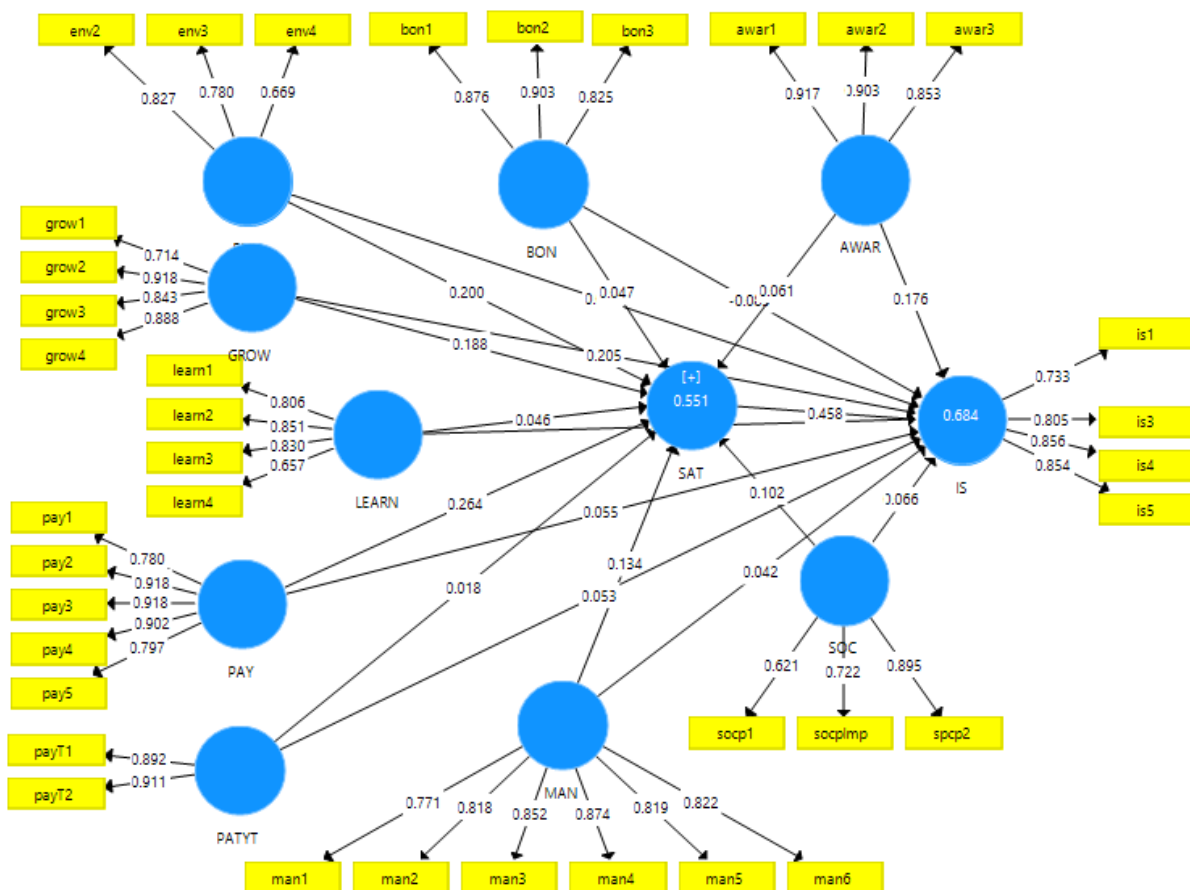


Figure 1 Path coefficients and outer loadings of the model (authors` construction)

Convergent Validity of the reflective constructs is examined with average communality or AVE (average variance extracted). It should be at least higher

than 50%. In the model, AVE scores are as follows: AVE: AWAR 0.795; BON 0.754; ENV 0.580; GROW 0.713; IS 0.662; LEARN 0.624; MAN 0.683; PATYT 0.813; PAY 0.748; and SAT 1.000 (since it is measured by one question); SOC 0.569. All the scores are above 0.5 and thus are acceptable.

Composite Reliability is an estimate of constructs' internal consistency and should be above the threshold level of 0.7. Composite reliability scores of the model are as follows: AWAR 0.921; BON 0.902; ENV 0.804; GROW 0.908; IS 0.886; LEARN 0.868; MAN 0.928; PATYT 0.897; PAY 0.937; SAT 1.000 (since it is measured by one question); SOC 0.795. Composite reliability scores are well above the minimum of 0.7, thus indicating sufficient reliability.

Discriminant Validity represents the extent to which measures of a given construct differ from the measure of other constructs in the same model. The Heterotrait-Monotrait (HTMT) ratio of correlations is used to measure discriminant validity (Hair, et al., 2011). HTMT is a ratio of correlations within constructs to correlations between constructs. All HTMT values should be lower than 0.85 for conceptually distinct constructs, such as work environment perceptions and management, and lower than 0.9 for conceptually more similar constructs such as satisfaction and intentions to stay. All the HTMT values of the model appeared to be lower than 0.85, thus, the validity was confirmed. Besides, Bias Corrected confidence intervals showed that neither the high nor the low confidence intervals included a value of 1. Thus, the discriminant validity is demonstrated by the HTMT method.

Inner model results. The primary evaluation criteria for SEM are R^2 results. R^2 values of 0.75, 0.50 and 0.25 for endogenous latent variables indicate substantial, moderate or weak predicting capacity (Hair, et al., 2011). The model had R^2 (IS) = 0.68 and adjusted R^2 = 0.67; R^2 (SAT) = 0.55 adjusted R^2 = 0.54, thus the model has an above-moderate predicting capacity.

All the relationships between the latent variables (except two non-significant relationships) are positive. Thus, for each of the relationships, an increase in the value of an independent latent variable is associated with the increase in the value of a dependent latent variable. The highest statistically significant path coefficients are SAT-IS (0.46); ENV-SAT (0.2); PAY-SAT (0.26); GROW-SAT (0.2); GROW-IS (0.2), as seen in Table 1.

The individual paths coefficients of the PLS structural model are interpreted as standardised beta coefficients of OLS regressions (Hair, et al., 2011). Data analysis reveals a strong relationship between satisfaction and turnover intentions. Only three factors out of the nine included in the model appeared to have a significant relationship with employee intention to stay. The work environment, growth (potential for personal development) and the award system were found the most effecting factors. Still five factors exhibit a

significant relationship with satisfaction – the work environment, growth, management, pay and social security.

Table 1 **Inner model results** (author`s calculations)

Construct	SAT		IS	
	Path Coefficient	P Value	Path Coefficient	P Value
BON	0.047	0.447	-0.083	0.076
ENV	0.200	0.000	0.078	0.041
GROW	0.188	0.000	0.205	0.000
LEARN	0.046	0.277	-0.002	0.953
MAN	0.134	0.004	0.042	0.289
PAY	0.264	0.000	0.055	0.277
PAYT	0.018	0.757	0.053	0.204
SOC	0.102	0.019	0.066	0.068
AWAR	0.061	0.279	0.176	0.000
SAT	na	na	0.458	0.000

Mediation Analysis. A PLS-SEM technique is especially useful to evaluate a direct effect, an indirect effect and a total effect. In order to understand between which construct and intentions to stay (IS) satisfaction (SAT) is a strong or moderate mediator, we run the model without SAT and received the path coefficients for an indirect effect. Then we run the model with satisfaction (SAT) and got path coefficients for a total effect. This allows calculating variance accounted for (VAF), which is variance accounted for (explained) in the dependent variable by the indirect relationship. Table 2 presents indirect and total effects, as well as mediation strengths. If an indirect effect is significant, there is mediation.

Table 2 **Total effect and variance accounted for mediation** (authors` calculations)

Effect	Indirect effect		Total effect		VAF %	Mediation strengths
	Path coefficient	p Values	Path coefficient	p Values		
ENV -> IS	0.092	0.000	0.170	0.000	54.1	partial mediation
GROW -> IS	0.086	0.001	0.291	0.000	29.6	partial mediation
MAN -> IS	0.061	0.006	0.104	0.015	58.7	partial mediation
PAY -> IS	0.121	0.000	0.175	0.002	69.1	partial mediation
SOC -> IS	0.047	0.023	0.112	0.006	42.0	partial mediation

Growth has the strongest total effect on intentions to stay followed by pay. Thus we can conclude that satisfaction partly mediates the relationship between IS and ENV, GROW, MAN, PAY and SOC.

Multi-group analysis. Multi-group analysis allows comparing parameters such as path coefficients between two or more groups when the groups are known. Since public sector organisations in Latvia are especially interested in attracting young employees, a multi-group analysis is performed between 5 age groups. The question to be answered is “which factors are the most important determinants of satisfaction and intentions to stay for younger employees?”

The multi-group analysis revealed that statistically significant path coefficients for employees under 30 were GROW → IS (0.27); PAY → SAT (0.35) and SAT → IS (0.45). The GROW → IS relationship is important for every second age group. Interestingly that the relationship MAN → SAT becomes significant only for the older generation of employees. PAY → SAT is important only for employees up to 50 years of age, after it loses the importance. PAY is not related to IS for all generations.

Discussion

The overall objective of this research study was to identify the main factors that determined the level of job satisfaction of public sector employees and to find out which factors should be addressed by management first in order to decrease employee turnover in the Latvian public sector.

The SEM technique allowed to study direct and indirect effects of constructs, as well as total effects on intentions to stay with the organisation. Job satisfaction was used as a mediating variable. Overall, the chosen constructs and model appeared to have moderate predicting power and the adjusted R^2 indicates that 67% of employee intentions to stay with the organisation and 54% of job satisfaction can be explained by the included constructs.

In this research study, the career growth was found to be the most important factor affecting employees' intentions to stay with the organisation with a total effect standardized regression weight of 0.29 ($p < 0.01$) and a direct effect path coefficient of 0.205 ($p < 0.01$). This result is consistent with O'Riordan (2013) who said that career development opportunities are among the factors employees traditionally expect from the public sector. In respect to job satisfaction, growth is ranked third with a path coefficient of 0.188 ($p < 0.01$).

Interestingly, that training and learning, which naturally is associated with career growth, appeared to have no effect on intentions to stay as well as on job satisfaction ($p > 0.05$). However, other research studies that combined training and personal development in one construct have found it to be significant (Turkyilmaz, et al., 2011).

Implications for public sector organisations are that they need to create a work environment in which employees perceive support in their career development aims. Talent management practices should be introduced by HR departments and clearly communicated to all employees, even the newcomers. Career plans for all employees should be created and career opportunities discussed during annual evaluations. Organisations should re-evaluate the provided training programmes and, probably, change them to better link them to career growth needs of employees.

The second most important factor on intentions to stay was found to be the work environment with a total effect of 0.17 ($p < 0.01$). The work environment has also a significant effect on job satisfaction with a standardized regression weight of 0.20 ($p < 0.01$). This result is consistent with the conclusions of Turkyilmaz (2011) who suggests that satisfaction can be raised by the ergonomic design of a workplace. The work environment includes such working conditions as a satisfactory workspace, cleanness, appropriate lighting, office equipment, temperature and similar things important for everyday job.

Pay was found to be the third important construct that effect intentions to stay with a total effect path coefficient of 0.264 ($p < 0.05$). It is also a very important creator of job satisfaction with a standardized regression weight of 0.264 ($p < 0.01$). Interestingly, that pay has no significant direct effect on intentions to stay, with job satisfaction mediating the relationship. These results allow drawing conclusions about the Latvian public sector's single remuneration system reform. The system itself provides a transparent structure of job grades and requirements and allows having a coherent and equal approach to setting pay levels in all public sector organisations, which is very important in respect of job satisfaction. However, what needs to be addressed urgently is the pay level itself, which since the crises period and consolidation activities made by the government has significantly dropped below the market's average. The newly introduced performance management systems put high focus on result implementation and thus adjustments in the pay system could be made introducing a stronger link between performance and pay.

Interestingly that awards are linked to pay and have a significant direct effect on intentions to stay with a path coefficient of 0.176 ($p < 0.01$), but no effect on job satisfaction ($p > 0.05$). Awards mean the recognition of excellence of a particular employee. Consequently, if an employee feels that he or she has outstanding achievements and excellent performance but is not awarded for that, the employee may feel offended and leave the company. Managers in public sector organisations should be aware of the importance of awards and recognitions, and the reward system should be based on individual performance and be fair and just towards all employees. This finding is in line with that by

Erturk (2014) who found that recognition was one of the most important HR practice for public sector IT employees.

Finally, an immediate management attitude with a path coefficient of 0.104 ($p < 0.05$) appeared to have a significant total effect on intentions to stay. However, a direct effect is not significant and job satisfaction serves as a mediator. Management with a path coefficient of 0.134 ($p < 0.05$) was found to have the fourth most significant effect on job satisfaction. This finding is in line with that by Nohria (Nohria, et al., 2008) who indicated that supervisors might foster the motivating local environment even if the organisation as a whole was not then the best one. However, the multi-group analysis revealed that this construct was a significant predictor of job satisfaction only for the age group of 56 and above. For younger generation employees, management attitude was significant neither for job satisfaction nor for intentions to stay.

It was expected that in the public sector a better social security package might be a significant factor effecting intention to stay, and it appeared to be a significant predictor of job satisfaction with a path coefficient of 0.102 ($p < 0.05$) and also have a total effect on intentions to stay with a path coefficient of 0.112 ($p < 0.05$), but no direct effect. In this case, job satisfaction serves as a mediator.

Job satisfaction is important, as it partly mediates a relationship among the work environment, growth opportunities, management, pay and social security and intentions to stay with the organisation. The path coefficient between satisfaction and intention to stay is significant and the highest in the model at 0.458 ($p < 0.01$). For public sector organisations, satisfaction with the job has a direct impact not only on the time they spend working for the organisation but also on the quality of services provided.

Public sector organisations are willing to recruit specialists of younger generation; however, it is a well-known fact that younger generations are motivated by different factors, compared with other generations. The multi-group analysis revealed that for employees younger than 30 years, pay is the most important factor with a standardized regression weight of 0.448 ($p < 0.01$) with respect to staying with the organisation and 0.35 ($p < 0.01$) with respect to job satisfaction. This is in line with other generation research studies done in Latvia. Career growth is the second most important factor for staying with a path coefficient of 0.273 ($p < 0.01$). All the other factors for younger generation employees appeared to be statistically insignificant. Implications of this finding for the public sector is that, taking into consideration that salary might not be under control of the organisation, clear career growth paths and opportunities should be envisaged for young employees already during the introduction period. A clear understanding of what career path the public sector may offer for a young employee might be the crucial factor why he or she chooses the particular employer and stays with the organisation.

Conclusion

The paper reveals the relationship between factors forming employee satisfaction and turnover in the public sector in Latvia and identifies the most important factors. Taking into consideration the cost cuttings and economic situation, career growth and personal development and the work environment are the two factors that should be addressed first by the management of a public sector organisation since they have the strongest relationship for intentions to stay with the organisation. Career growth is important also for the younger generation, and for them it is the only factor, which might be influenced objectively.

PLS-SEM appeared to be a useful technique, as it allowed revealing direct effects, indirect effects and total effects of the constructs on a latent variable. It also allowed measuring the strengths of mediation and performing the multi-group analysis.

The research study, however, is subject to some limitations. The research is based on a particular organisation and the case study approach, therefore the findings cannot be generalised to the whole population of public sector employees. The case study was preferred to a large-scale quantitative survey due to the sensitive nature of the subject. Another limitation is connected with the included constructs. Although nine factors were included in the model, it cannot be claimed that these factors are the only possible predictors of job satisfaction and intentions to stay. Other important factors might be relevant, like, for example, public service motivation. Thus, there is a vast arena of future research.

In spite of the above limitations and context specificity of the results, this research study contributes to the academic literature and HR professionals, since it is performed in the public sector organisation in a developing country. Public institutions in other post-socialist countries may experience similar dynamics and thus the findings of this research study may be of interest to HR professionals from other countries. The public sector has a major role to play in the development of any country, thus any kind of research on this sector has a wider impact and could not be overestimated.

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EXPECTATIONS IN RESPECT OF THE SUPERVISOR'S IMAGE: THE LITHUANIAN CASE

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Abstract. *Each profession and the image of its representatives are being assessed taking into consideration the specifics of the activity, the environment, the existing stereotypes and the attitudes towards it. The activity of the supervisor is a new one in Lithuania therefore a lot of stereotypic attitudes appear in respect of the supervisor's profession. That means it is very important to find out what supervisor's image have the supervisors themselves, and what are the expectations of the counselled ones in respect of the professionals in this field. The goal of the research is to analyse the expectations in respect of the supervisor in Lithuania, based on insights of supervisors and of the persons with and without the experience of supervision.*

Keywords: *Image, image formation, supervision, supervisor.*

Introduction

Lately nobody doubts any more that one of the key factors that determines the attitude of the society towards a particular institution or a profession is the image which, in its turn, associates with success and popularity. Image creation is understood as a continuous, planned activity requiring considerable resources, efforts and desire.

Every profession and the image of its representatives are being assessed taking into consideration the specifics of the activity, the environment, the existing stereotypes and the attitudes towards it (Drūteikienė & Mackelo, 2010). The activity of the supervisor is a new one in Lithuania therefore a lot of stereotypic attitudes appear in respect of the supervisor's profession. That means it is very important to find out what supervisor's image have the supervisors themselves, and what are the expectations of the counselled ones in respect of the professionals in this field.

It should be noted that the image is gradually being created, is continuously controlled and enhanced (Uzienė, 2011; Ali-Choudhury et al., 2009), therefore it has to be improved and developed. A negative image is created when the knowledge on image formation is absent, or because of a casual attitude towards the activity being performed. Changing of the image is difficult; it requires not just a lot of efforts, but quite considerable financial resources as well. Aiming at creation of a planned professional image rather than a spontaneous one, the

strategy of the image formation should be thought over and developed already in the beginning of the activity; it would allow the representatives of the profession to assess them in respect of the environment and to set the basic objectives of their activity (Eisenegger, 2009). The strategy of the supervisor's activity shall cover the activities by which he/she will seek for improvement of the professional image. A positive professional image secures a stable position of the supervisor in the society, the desired payment for the provided services and a better competitive position. This research attempts to answer the problem question – what factors help the formation of a positive supervisor's image.

Goal of the research is to analyse the expectations towards the supervisor's image in Lithuania.

Research methods: analysis and synthesis of scientific literature and interview.

Image concept

The conception of the image is investigated through different aspects: strategic management, personnel management, organisations, psychology, communication etc. The concept of the image comes from the Latin word "imago", which joins two meanings "imitari" (imitate) and "aemulor" (endeavour). The image is an emotional conception of goods or of a service determined by social – psychological conception (Čereška, 2004, Pranulis, et al., 2012); that means it is an impression constructed purposefully and consciously (Mikalkevičienė & Laurinčiukienė, 2009). At first sight, it might appear that it is very simple to define the image, but, analysing scientific literature, very frequently the concept of reputation is used together with the image and/or as synonymous concepts. Analysing scientific research studies, it is possible to distinguish two schools in the image and the reputation concepts. The first school considers those concepts identical, i.e., synonymous (Alevesson, 1998; Dichter, 1985; Dowling, 1986, 1993, etc.), the other group of schools treat the concepts as different (Ali-Choudhury et al., 2009, Safon, 2009, Šontaitė & Lydeka, 2010). In the opinion of the authors, the reputation is based on perception/understanding about an organization/person, which is formed in a course of time and is basically focussed on what the person does and what is his/her behaviour. Unlike reputation, the image is formed based on the newest beliefs. The reputation develops in a course of time, it cannot be created so fast as it can be done with the image. Even more, an organisation/a person may have good reputation (for e.g.: supplying excellent products), but have a bad image. That means that the image might be created much faster and simpler than a reliable reputation. Some scientists consider the image as a constituent part of the identity, since the identity is associated with understanding of a profession or

an organisation, and the image is an impression of the profession or of the organisation.

Thus, the image is a picture of the profession existing in the minds of the audience – what idea comes to one's mind when hearing the name of the profession. The image may be created when the reputation must be deserved. Consequently, there is a two-sided subordination, we create the reputation ourselves, but poor reputation has influence also on the image; the same is with the image: it is tough to deserve the reputation when the image is poor. Professional reputation is based on demonstration of "high professional standards" (Cournoyer, 2008), as well as on responsible behaviour (Eisenegger, 2009). According to Eisenegger (2009), the reputation is more than functional competence, it is a moral dimension.

The image is the value of the service for an individual or for a group of individuals (Roberts, 2009). Very often the image is determined by the conception, thinking and feelings of other persons. R. Chun (2005) defines the reputation as the top of the umbrella, and the identity and the image as the constituent parts. The image is understood as the conception of the profession by the interested subjects; the identity as the self-perception of the representatives of the profession, the reputation as the picture of the inside and outside.

In other words, the image is defined as the created and formalised identity presented to the segments of external environment and forming as the result of conception process of different addressees (Lakačiauskaitė, 2012). The image concept defines the whole rather than individual traits, i.e., the solid picture which is formed in human minds (Dichter, 1992).

Every supervisor, as a representative of the profession, becomes the carrier of the supervisor's image. The professional image of the supervisor may be investigated as a personal image, paying attention to the professionalism of the individual, since this phenomenon as a social-psychological phenomenon, first of all associates with human inter-relationship, conception and assessment. Scientists indicate the competence, self-confidence, stability, self-control, morality, leadership traits, optimism, adaptability, conflict solution and communication skills as assumptions for formation of positive Professional image (Drūteikienė & Mackelo, 2010). The specialists of public relations, summarising opinions of different authors, state that the image is considered as the whole of conceptions, imagination, ideas and feelings which a person or a group of persons have in respect of a particular phenomenon or of a particular item (Uzienė, 2011). The image as a specific phenomenon is named as: a condition for seeking of success and stability; as a precondition for easier access to various new possibilities (financial, people, information etc.); a guaranty of reliability and superiority in competition; as an initial contribution to the future.

Without any doubt, defining the supervisor's image, it is possible to define it from the cognitive prospect, i.e., personal feelings in respect of the supervisor and as a communication process, which relates to the information that is spread about the supervisor.

Since the supervisor's activity is new in Lithuania, and its nature determines continuous changing and development through adapting to changing conditions of the society. Therefore it is especially important to develop a planned image, rather than a spontaneous one; it has to be thought over, and to create the image formation strategy, which would help to assess oneself in respect of the environment and to set the key goals of one's activity

Discription of reserch process

The research was carried out from September 2014 to April 2015. The research was organised in three steps. In the first step, with the purpose of highlighting of the factors that influence formation of the image, an analysis of secondary sources was performed. Scientific books and scientific magazines, internet materials were used. It should be noted that only the informational sources required for the research, guarantying reliability and well-founded were selected. Based on the information from the secondary sources, during the second step three groups of informants were surveyed.

Table 1 Characteristics of the informants (author's construction)

Item No	No supervision experience	Code	Having experience of supervision	Code	Supervisors	Code
	<i>Age, sex, professional activity area</i>		<i>Age, sex, professional activity area</i>		<i>Age, sex, professional activity area</i>	
1.	Female, 45, law and order	(NS1)	Female, 48, social services	(TS1)	Sex and age of the supervisors is not indicated securing their confidentiality	(S1)
2.	Female, 56, education	(NS2)	Male, 45, Head of a NGO	(TS2)		(S2)
3.	Male, 43, management	(NS3)	Female, 45, education	(TS3)		(S3)
4.	Female, 32, art critics	(NS4)	Male, 40, Head of a NGO (133 employees)	(TS4)		(S4)
5.	Female, 38, finance	(NS5)	Female, 50, Director of a foster institution	(TS5)		(S5)
6.	Female, 39, medicine	(NS6)	Female, 42, business, region manager	(TS6)		
7.	Male, 43, business	(NS7)				

The scope consisted of 18 persons from different regions of Lithuania and from different groups: five supervisors, six managers that had had supervision in their organisations and seven informants that had no supervision experience (Table 1). Since the image can be divided into the visionary, the real and the desired: the visionary image – when the object is believed to have a particular image but that is not true; the real one – what others see about the person and the desired image – the image aimed at to be developed (Drūteikienė, 2007); therefore different groups of informants were selected. The number of the informants was determined following the principle of data saturation.

The informants with no experience of supervision were introduced to the concept of supervision and only after that they presented their answers. A structured interview was used for collection of research data. For the analysis of the results the content analysis method was used: 1) the texts of the respondents were read and the key aspects represented by phrases and words were distinguished, the categories were separated; 2) the nominal elements were identified; 3) the nominal elements were divided into sub-categories; 4) interpretation of the content data. A theoretical approach that the text presented by the informant is a content analysis when the material of educational diagnostic research reflects the personal reflection process as the essential aspect of experience-based learning, was followed (Žydžiūnaitė et al., 2005).

The research was performed following all principles of the ethics mandatory for research. During the research, it was attempted to make no moral, psychological or any other damage to the informants. For the purpose of the confidentiality, the informants were granted codes to secure their anonymity.

Factors that influence the supervisor's image formation

An analysis of the informants interviews confirms statements of scientists that exogenous factors and the inner characteristics of the supervisor form the image of the supervisor. Exogenous factors, such as price of the service, age, experience, looks and recommendations influence the image of the supervisor. Inner characteristics mean inner traits of the consultant and his/her posture, values, world-view, competence.

Exogenous factors. Representatives of all the three groups agreed that **the price is important part of the image of a good service**. The supervisors related the piece with the self-esteem of the supervisor and the value of the service for an organisation: *“Price represents supervisor's evaluation of the provided services. An expensive service should be of good quality, and if the price is low, what about the quality then?”* (S4); *“Price is a part of the image”* (S3); *“a good computer, a good car costs a lot – isn't that so?”* (S2); *“As regards the price, I*

believe that supervision might be undervalued very quickly, it is enough that it is underpaid.” (S5).

Both informants, with and without the experience of supervision, emphasized the influence of the price on the quality of the service:

“<...> I don't believe that a cheap service is attractive” (TS2); “higher price means better quality. A good supervisor cannot be bought for a low price.” (NS1); “Price is important, but it should not be very low, since it brings questions about the quality” (NS5).

Both informants, with and without the experience of supervision, asserted that they, when selecting a service, would not go neither for a very high price nor for a very low one: *“Market price does exist, one knows the price of consultancy” (TS5). “Price shall correspond to the price level of similar services on the market.” (NS3); “...the average, neither the highest nor the lowest.” (NS7);*

The image of a consultant is inherent **with maturity and the presence of life experience**. In the opinion of the supervisors, life experience is important: *“I believe that older, having life experience, supervisors are more appreciated” (S4).* The informants that had supervision experience estimated the age of the supervisor as one of the criteria of reliability of the supervisor: *“...age <...>in supervising directly relates with the image,” (TS1); “Anyway, I would opt for a more mature age, because of bigger life experience, better organisation/responsibility skills, ...” (TS2); “...feeling life experience, gained and /or already applied knowledge is important in communication.” (TS6).*

The informants that have no experience of supervision stated that they opt to choose a supervisor with life experience, middle-aged or close to the same age group: *“...close to my age, since it is personal and professional experience.” (NS1); “age (from 40 to 50), because experience and qualification is already present” (NS1); “the priority is over 40, it associates with the experience aspect, the maturity of a human being, and it helps in the context of relationship.” (NS4).*

For the informants without experience of supervision, the older age associates with categorical attitudes, and the young age – with the lack of experience: *“...I would not like to go to an older supervisor, since they are very formatted and categorical (it is not the number of years, but the way of thinking is old fashioned), I would go to a younger than me one, because the vision better corresponds to the pulse“ (NS2); “Very young ones cause doubts about the experience.”(NS3).*

According to the supervisors, **the experience in supervision** is an inseparable part of the supervisor's image: *“Everything is linked together –..., and experience ...” (S1); “probably that is the most important thing for the image. Supervision is a profession for mature people. Experience adds to*

maturity” (S2); “Experience in supervision helps to get orders and in the initial attitude” (S3).

All those with the experience in supervision unambiguously approved that bigger experience in supervision is a reliability criterion: “It would be bloody interesting; they must have solved more than one complex dilemma.” (TS4); “<...>experience in supervision directly relates to the image, but for each client that buys the supervision service those elements would have a different meaning or criteria, since it is difficult to define the experience in years” (TS1).

The informants without supervision experience paid the most attention to the experience. Experience is associated with the duration (years) of supervision and its objects. Choosing a supervisor, the informants without supervision experience would inquire about the experience of the supervisor: “Duration of the work in this field is important<...>of course, experience is important (minimum one year of practice in the field)” (NS1); “Experience in supervision is one of the most important issues, I would look for one with minimum 5 years of experience,.... I would be impressed by diversity of experience. Experience is the formation of informal skills. <...> It includes professional experience and the experience of informal training.” <...>I would ask about the experience, what and how much experience in this field...<...>...though I would go for someone that has experience (NS4); “Experience is the key element” (NS5); “Experience is very important” (NS3); “It is important” (NS6); “People must be strong and have experience. The person shall be a teacher to you. <...>Experience in consultancy: it is important but not critical. Experience relates to the price of the service, the less experience, the lower the price (NS7).

Both informants with experience and without it agreed that the experience of work with well-known companies is inseparable from experience: “I would like to be supervised by those that have experience of work with elite managers...<...>Anyhow, our elite manager is demanding, they will not buy anything, so this would give me some trust in him, but, most probably, he would not supervise me. But it would be bloody interesting, since they must have solved more than one complex dilemmas. <...> (TS4); “Work experience with known companies... “ (NS3); „I do care about work experience, ...experience buys me – the supervisor must have seen everything from all angles, and nothing else matters for me.“(NS4);

Our appearance, especially attractiveness and constitution are significant for efficiency of communication process. It is especially important when we meet the client for the first time (Baršauskienė et al, 2007).

Clothes not just protect against negative factors of the environment but also are one of non-verbal communication signs. The importance of clothes is gradually decreasing, but this just confirms assumptions that in the initial step of

meeting and communication, when the employees have to make as good impression as possible on the clients, clothes are very important.

According to all the supervisors, **supervisor's outfit** is a part of the supervisor's image related to solidness: *"That is a part of the image. One must match the target group. Business most frequently buys solidness (unless knows). If they know you and want you, appearance does not matter. When talking to ministries, it is better to be more solid than in cases of business. Those would not notice you unless you wear a shirt and a jacket. Their eyes are used to that. What can we do? Disabled people. If the relationship is informal, the appearance might also be informal, sometimes even punk-style."* (S2); *"Visual physical image (presentable appearance (manager-level outfit rather than casual))"* (S3).

According to the supervisors, the supervisor's outfit not just simplifies establishment of the contact with the client, but also presents the attitude of the supervisor towards the work and the client and it may influence the dynamics of the supervision process and forward the creation of the desired relationship: *"Appearance makes the first impression and shows the attitude towards the work and the client. I believe the appearance should not upstage the clients. I think the outfit should be to some level matched to the groups of clients. <...>The outfit, in my belief, may provoke dynamics. On the other hand, a geared up supervisor may inspire with his/her set-up"* (S4); *"And as regards the outfit – the first meeting is very important and the outfit is not the least important; I establish a relationship through it."* (S5).

Those that had the experience of supervision were less demanding towards the appearance/outfit of the supervisor. Two informants stated that the supervisor should dress neatly, since this creates business-like atmosphere: *"<...>hairstyle, outfit (neat, not necessarily the smartest ones),...<...>Should be neatly dressed, of pleasant look."* (TS1); *"Exterior: stylish clothes, but more of the classical style rather than a fashion show. <...> without any doubt, the appearance at least reservedly neat, no challenging style."* (TS2); *"Official appearance creates business-like atmosphere. Official outfit is what I wear at work – jeans and a jacket"* (TS5).

The analysis of the research data showed that in one case the exclusivity of the supervisor was assessed negatively, associating it with uncertainty or work disturbances during the course of supervision: *"I would never buy supervision from a supervisor who wears earrings all over <...> That is an artistic person, he/she could forget the meeting."* (TS5); *"Most probably I would not buy from a much sexualised girl. Because I would be afraid of my own reactions to it; it interferes with the process"*. (TS4);

Inner world of the supervisor. In the course of analysis of the research data, the requirements (expectations) set by the informants in respect of the

inner world of the supervisor were highlighted. Three categories were distinguished in the requirements to the supervisor's inner world: inner characteristics of the consultant and his/her attitude, values /world-view, competence.

When assessing the attitude of the consultant, the informants stated that the supervisor should be happy, self-confident and flexible, orientated towards life-lasting learning, bravely stepping over the limits of own comfort zone and etc.: *"Wisdom, personal traits, psychological immunity, creativity and etc. are important"*(S1); *"<...>reserved, self-confident professional who creates conditions for self-reflection and client's reflection. <...>self-confidence, free communication, some attributes of power, response to the needs and ability to satisfy ..."* (S3); *"...the image shall show that the supervisor has solved own problems, so now he/she can assist the others to solve their problems."* (S2); *"<...> posture – ease, openness ;<...> I believe they shall look for clients in all ways – one cannot just become a supervisor at once. So being someone else and having the supervisor's posture, you start search for customers. It is important first of all to see oneself as a supervisor and to tell the others that I am a supervisor."* (S5).

In the opinion of those that have supervision experience, it is also important that the supervisor is self-confident, has inner appeal and charm, is sincere and open, and has a shuddering eyesight: *"it is important that the head of supervision is self-confident"* (TS3); *"I believe that it is very important that the person looks and speaks with self-confidence, with sound self-confidence."* (TS6); *"...a straight piercing look. But not irritating."* (TS6); *"initial charm <...> the charm would add an illusion of easiness, competence, as good sales people have. So the charm..."* (TS4); *"Should be warm, but not too soft,"* (TS6).

According to those that have no experience of supervision, the behaviour of the supervisor shall represent the values that he/she is trying to pass on others; he/she must be objective, "real", open, having a sense of humour, emphatic and *"represent the values that are emphasized <...>"* (NS5); *"Also objectivity, the format should be very flexible and broad. „Open mind“, since it is a human being, not a robot“ <...>personal traits (people that feel whether one works knowing the issue, or just asks because of curiosity), I would go for the one where I feel conviction; the person must have intuition, since those things bring trust; once is enough for me to know to go for or not."* (NS2); *"Empathy, closeness in values, <...>"* (NS4); *"Sense of humour<...>"* (NS5); *"Personal traits (ability to listen, but you see that and feel) work better than the professional ones, because supervision cannot be learned, one must have potency for that..."* (NS2).

The informants that have the experience of supervision and those that do not have it defined the values/world-views that the supervisor should follow.

According to the informants that have the experience of supervision, it is important that the supervisor trusts the capability of the client to solve his/her problem and is honest. Supervisor's choice may be influenced by the supervisor's way of work (more orientated towards psychology or management): *"the supervisor believes that the "client" knows himself and can solve own problems on his/her own, that the supervisor is just a waymark, or a fingerpost. <...> Respect for the client is very important."* (TS3); *"I would buy from the one that believes that I want to and that I really need to solve the problem."* (TS3); *"<...>honesty from the supervisor's side could help to sell, when he/she says that you need other than this. <...> It would help me to buy it and would disclose the value position which is important"* (TS4).

Both the informants with the experience and those without it agreed that the supervisor's declared world-views would influence their selection of the supervisor: *" <...>it is important to estimate own position from the value point, what is the base it is built on, does it belong to any existentialist school, geshtalt, or relates his/her world-view to the Christian base. The value moment is of importance. <...> what is the world-view as the base for the services. I could be bought with an "existential and Christian world-view; it does not have to be worded, but that is an essential issue."* (NS4); *"For this the people that specialise in it are needed"* (TS4).

Analysis of the research data showed how different groups of informants interpret the supervisor's competence concept. Of course, many of the requirements, provisions etc. already discussed at work include individual elements of the supervisor's competence. One of the informants stated that: *"<...> supervisors in Lithuania would make a good impression – demonstrate their competences..."* (S2); Another informant defined the supervisor's competence with the following skills: *"style of speaking – inflection, vocabulary; communication – ability to establish a contact and to guide it towards relationship, listening and response to what you hear"*(S5). *"I believe the authenticity and development of relationship are the most important for the supervisor. <...>it is impossible to achieve trust without authenticity, <...>"* (S5).

The analysis of the research data showed that those that had the experience of supervision associate the supervisor's competence with: the supervisor's experience of the work with different clients *"<...> it may be disclosed through some experience, if he/she says with whom he/she has worked with."* (TS4); abilities to listen, to recognise, to reflect and to explain the on-going processes: *"I would buy from the one that is able not just to listen to, but also to explain the processes that are going on in the group or with me."* (TS3); *"<...>when he said that the depth is enough – it is important for me. <...> I would be encouraged to buy, i.e., understanding that the person understands when I speak"*

and responds to me, that is the reflection that helps me to understand already during the first dialog. <...> that is <...> listening and precise reflection” (TS4); “<...>the supervisor’s competence is disclosed <...> through the style of speaking, which could be helping me to understand” (TS4); Insight – helps to pay attention to “something” in any told story. Concreteness. Setting points at the end of the session or at the end of discussion.” (TS6); ability to control the supervision process: “Ability to communicate, to listen to, to recognise and to guide.” (TS3); “Style of speaking, process control, ability to bring the process to closing and fixing of the result.” (TS3); good communication skills “<...>easily communicating, communicability.” (TS1); “communicative; sense of humour”; “Eye contact – as if sees through a brick wall, <...>” (TS6); “<...>created conditions for open discussion and get deep into one’s problem, I knew that I personally would get as much time as required.” (TS3).

According to those that had no experience of supervision, the competence of the supervisor is disclosed through: supervisor’s communicative skills: “interesting lecturing, presents information in an understandable, visual way...” (NS6); “Oratorical skills, but simple language so that it is understandable to a common listener. Ability to control the audience.” (NS5); “Ability to answer questions quickly and precisely.” (NS5); Ability to influence the dynamics of the process: “The most influence has the one that can tear you to pieces but in the end as a conclusion you understand that you are good”. (NS7); “Technical issues: to respond, to reflect and something else...” (NS2).

Conclusions

The development of a professional image is a complex process, which requires concentration and joint work of supervisors aiming at improvement of the professional image. Every profession has to select a model that fits it and develop own professional image following it.

Creating the image, it is necessary to consider: the user of the service (the needs, the social status etc.); the image of the supervisor (the looks, psychological characteristics, verbal and non-verbal language, the main activity); social behaviour in the society (social responsibility).

The social status of the user of the service supposes the choice of a particular supervisor. The heads often wish a supervisor having the experience of management. The users of the service want a supervisor of similar age. The experience of a supervisor is very important; it is understood as the experience in supervision and the objects of supervision. The look of a supervisor is a positive element of positive development of the supervisor, but the look is associated with neatness rather than with a particular outfit or its style.

Supervisors themselves emphasize the professional development of the supervisor and professional supervision; meanwhile for the recipients of the service, the behaviour of the supervisor, which represents his/her values, certainty, openness, sense of humour, empathy, is the most important.

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LEGAL AND FINANCIAL WORK ASPECTS OF ACADEMIC STAFF IN LITHUANIA, SLOVAKIA AND LATVIA

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***Abstract.** The legal and financial work aspects of academic staff have been insufficiently studied. Basically, it is the existing autonomy of each university personnel policy. The variety of diverse approaches exists not only in different countries, but also within the borders of one particular country. The research aims to provide an evaluation of the legal and financial work aspects of the academic staff in Lithuania, Slovakia and Latvia. In the framework of this research a comparative analysis of all three countries' legislation has been performed, reflecting common and distinctive features of the academic staff requirements, as well as general principles of salary formation have been evaluated.*

***Keywords:** academic load, academic staff, higher education, salary.*

Introduction

Work of the academic staff at higher education institutions is linked to three main areas of activity: provision of the quality study process, methodological work and scientific activity. Nowadays representatives of the academic staff work in a dynamic, complex and unpredictable work environment. They are exposed to increasingly higher quality requirements, for instance, demand for continuous professional development, excellent knowledge of foreign languages, publication in a peer-reviewed databases, etc. Very often the academic staff are challenged by a situation when they have to deal with a great amount of work, they have to meet high quality requirements, although remuneration, especially in the lower categories of positions, such as assistants or lecturer, is not competitive enough.

So far, studies into the legal work aspects and requirements of the academic staff, as well as remuneration mechanisms have been investigated in some other respects. For instance, there have been studies into the role of performance

appraisal in motivating and compensating the academic staff (Tuerk, 2008), a comparative analysis on the appraisal and compensation in public and private higher education institutions (Tuerk & Roolaht, 2007). Separate articles are devoted to the exploration of legal aspects of the academic staff workload (Valčiukienė & Skėruvienė, 2012).

The aim of the research is to provide an evaluation of the legal and financial work aspects of the academic staff in Lithuania, Slovakia and Latvia.

Research methods – monographic, analysis and synthesis, graphic, document analysis and content analysis methods have been employed.

The research is based on current scientific studies and exploration of legislative acts of Latvia, Slovakia and Lithuania.

Interpretation of academic staff qualifications and responsibilities in the legislation

The concept of „academic staff” on a daily basis is understood as a category of people who fulfil their professional duties in higher education institutions. The content-related extent of the concept varies significantly across the legislation of different countries. According to the Latvian legislation, the staff of an institution of higher education shall consist of:

- professors, associate professors;
- docents, senior researchers;
- lecturers, researchers; and
- assistants (Law on Institutions of Higher Education, 1995).

According to the Lithuanian legislation, the positions of teaching staff of higher education institutions are as follows:

- professor,
- docent,
- lecturer,
- assistant (Law on Higher Education and Research, 2009).

It should be noted that the Lithuanian legislation provides individually defined scientific staff positions: „The research staff of higher education and research institutions shall be researchers holding the position of a chief research staff member, a senior research staff member, a research staff member, a junior research staff member, as well as postdoctoral grant holders”

Table 1 The main activities and responsibilities of a professor and a lecturer in Latvia, Lithuania and Slovakia in accordance with the national legislation

Position	Latvia	Lithuania	Slovakia
Position of a professor	The delivery of highly skilled lectures, the supervision of studies, lectures and examinations in his or her study course; the supervision of research works in the sub-field of science or the supervision of artistic creation in a field, which conforms to the title of the position of professor; the supervision of doctoral studies and research works in the sub-field of science or the supervision of artistic creation in a field, which conforms to the title of the position of professor; participation in the evaluation of the work and quality of study programmes, institutions of higher education and the structural units thereof; and the training of the new generation of academics, artists and lecturers. (Law on Institutions of Higher Education, Latvia, 1995)	A scientist or an established artist may hold the position of a professor. A scientist who holds the position of a professor must train scientists, teach students, conduct research and experiment (social, cultural) development and direct them, announce research findings. An established artist who holds the position of a professor must train professional artists, teach students, participate in artistic activities and/or develop art research areas and direct them, announce research findings. (Law on Higher Education and Research, Lithuania, 2009)	Giving lectures and seminars, ensuring student assessment, including assessment of state examinations, PhD students, supervising and reviewing final theses, as well as elaboration of study materials. (Law on Higher Education 2002, 2015)
Position of a lecturer	The tasks of lecturers shall be determined by the constitution of an institution of higher education. (Law on Institutions of Higher Education, Latvia, 1995)	A scientist or a person who has at least a Master's qualification degree or its equivalent may be a candidate for the position of a lecturer. A lecturer shall be involved in teaching students, performing methodological work. (Law on Higher Education and Research, Lithuania, 2009)	Teaching activities that do not require active participation in research and development, especially supervision of research, assessment of students, taking part in the provision of other educational activities and taking part in the process of elaborating study materials. (Law on Higher Education 2002, 2015)

The academic staff at universities in the Slovak Republic is divided as follows:

- university professor (prof.)
- associate professor (doc.)
- assistant professor (Ing., PhD.)
- assistant
- lecturer (Law on Higher Education, 2002 and 2015)

The overall range of academic staff responsibilities includes a variety of both study process-related activities, as well as scientific ones. In most cases, professor's position involves a significant part of duties focused on the implementation of scientific activities.

Evaluating and compiling the type of the academic staff work and the extent of legal regulations, it can be concluded that, in general, in all countries it is still the competence of higher education institutions:

- 1) In Latvia the amount of tasks in each of the types of basic activities shall be determined by the institution of higher education;
- 2) In Lithuania a higher education institution shall lay down qualification requirements of positions of teaching staff, which must not be lower than those established in paragraphs 2-5 of this Article (Law on Higher Education and Research, 2009), as well as shall define the procedure for organising competitions to fill the said positions and structure the performance evaluation regarding the teaching staff;
- 3) In Slovakia all activities of university academic staff are defined by the higher education establishment, based on the principles of institutions of higher education (universities, academies, etc.) as well as the accreditation committee.

Essential conditions in each country's legislation are envisaged exactly for the contractual period, which is the topic for discussion. In this regard, the emphasis should be placed on diametrically opposing views or objectives that are achieved by fixed-term, partially fixed-term or indefinite duration contracts.

In Latvia an employment contract with a person elected to an academic position (professor, associate professor, docent, lecturer or assistant) shall be entered into force by the rector for the period of election – six years.

In Lithuania the legal framework provides the academic staff with far more favourable conditions in case of re-election. Persons shall be appointed to the positions of teachers and research workers of higher education and research institutions through an open competition for a five-year term of tenure.

In Lithuania a person who has won the competition to hold the same position of a teacher or a research worker for the second time in succession shall conclude an employment contract of unlimited duration for holding this

position. Performance evaluation of this person shall be carried out every five years in accordance with the procedure laid down by higher education and research institutions. A period during which a higher education and research institution which carries out performance evaluation of a person granted that person a maternity leave, paternity leave or childcare leave shall not be included in the said five-year period (Law on Higher Education and Research, 2009).

In Slovakia the time of contract has an analogous nature in comparison with Latvia and Lithuania. The procedure of filling positions of university teachers as well as filling positions of professors and associate professors is carried out by the help of a competition in accordance with the established legal framework (Law on Higher Education 422/2015, § 75, point. 2). The selection procedure for filling the vacant positions of a professor or an associate professor is also a function of the defined recruitment process for a job of a university lecturer. The call for the competition in relation to a certain position is published on a university website, the site of the Ministry of Education, Science, Research and Sport of the Slovak Republic and is placed on the official notice board or an official faculty board when it comes to jobs or functions currently required by the faculty.

The employment of a university lecturer, who has a scientific-pedagogical title of a professor or an associate professor, employed in medical, pharmaceutical or veterinary faculties and holding a position in a public university, where the employee is required to fulfil one's duties, may be conditioned on the basis of one competition but for a relatively long period of time. This period is determined by the dean or the rector with a maximum period of ten years. An academic teacher may occupy positions such as an associate professor or a professor on the basis of one competition for a maximum of five years. If a university teacher acquired the position of an associate professor or a professor for the third time, and the total time of his tenure in these positions amounted to at least nine years, and has, if it is a position of an associate professor, a scientific-pedagogical degree or an artistic-pedagogical degree of „docent” and „professor” and if it is the positions of a professor, a scientific-pedagogical degree or an artistic-educational title „professor”, the right to an employment contract with the university is acquired, placing a university lecturer for inclusion in this position for a fixed period of time until the age of 70. A university teacher can be assigned by the rector or the dean for the purpose of carrying out only scientific or artistic work activities. This does not affect the provisions of special regulations on the remuneration of employees based on the Law on Higher Education, 2015.

The employment of university teachers shall expire at the end of an academic year in which they reach the age of 70 if their employment terminated earlier under special regulations (Law of Higher Education, 2002 and 2015).

Academic staff workload and remuneration

The most important concepts that characterise the workload are as follows: an academic hour, working time, which form the academic load and types of work that are included in the academic load. Table 2 summarises Latvian, Lithuanian and Slovak approaches to forming the academic staff workload.

Table 2 Working time of academic staff

	Latvia	Lithuania	Slovakia
What does it mean an “academic hour”?	A unit of working time for studies, the duration of which is 45 minutes (Law on Institutions of Higher Education, Latvia, 1995)	Duration of academic work is measured in academic hours (1 academic hour is equal to 45 astronomical minutes) (Law on Higher Education and Research, Lithuania, 2009)	One academic hour is equal to 45 astronomical minutes for lectures and seminars. Usually it means that a lecture is comprised of 2 or 3 academic hours (90 or 135 astronomical minutes) and a seminar embraces 2 or 1 academic hour (90 or 45 astronomical minutes) (Based on the defined principles by higher education institution)
Working time	600- 1000 hours are determined by an institution of higher education; usually Lecturers – 1000 Professors – 600 (Regulation of academic staff salary, 2009)	280 - 1000 hours are determined by an institution of higher education; usually Lecturers: 600 – 1000 Docents: 500 - 600 Professors – 280 - 600 (Workload structure, norms and the accounting , 2013) <i>Lithuanian University of Educational Sciences Senate in 2013. 20 March. Resolution No. 200</i>	Yearly working time of a university teacher is 1530 hours according to the following structure: - pedagogical activity – 880 hours - research activity – 600 hours - other activities 50 hours. Professors: 156 teaching hours per 1 academic year Docents: 208 hours per 1 academic year Assistant Professors: 312 hours per 1 academic year Assistants: 260 hours per 1 academic year Lecturers: 260 hours per 1 academic year. (Regulation of academic staff salary, 2013)
What do “pedagogical activities” and	Pedagogical activities and teaching hours mean the same; reflecting the following: - lectures,	Pedagogical activities and teaching hours are the same; It means - lectures, - exam (0.3 per student),	Pedagogical activities and teaching hours mean the same; - exam (0.3 per student)

	Latvia	Lithuania	Slovakia
“teaching hours” mean?	<ul style="list-style-type: none"> - exam (0.4 per student), - supervision of a diploma paper (14 hours per student) - supervision of a study paper (7 hours per student) - etc (Regulations on academic staff salaries, 2014, Academy of Technologies, staff.ru.lv)	<ul style="list-style-type: none"> - supervision of a diploma paper (18 hours per student) - supervision of a study paper (7 hours per student) - etc. (Regulations on academic staff workload, 2013, Academic Board)	<ul style="list-style-type: none"> - supervision of a diploma paper (19 hours) - supervision of a study paper (7 hours per student) - etc. (Regulation of academic staff salary, 2013)

Academic hours are identical in all investigated countries. A unique feature that shall be noted is a Slovak approach to allocating time for lectures or classes that are comprised of three academic hours not two, emphasising its unconventional nature. It is certainly appropriate for situations when considerable time for practical classes is required.

It shall be emphasised that there is a very different approach to shaping the academic load. If Latvia and Lithuania share the maximum of 1,000 hours, in Slovakia it is 1,530 hours. However, the Slovak approach foresees these hours including both scientific work, as well as other types of activities, such as administrative activities. Slovak example and comprehensive workload complex is a good example for further research. The research findings could certainly be exploited in discovering new approaches to shaping the academic load in Latvia.

If to compare only Latvian and Lithuanian approaches, the amount of academic load estimated in hours is more favourable in Lithuania for both professors and lecturers.

Noteworthy is the study into the understanding of the concept „teaching hours” across different countries. Latvian and Lithuanian perception is almost the same. However, minor differences still occur when determining the amount of hours allocated per certain type of work (exam time allocated per student, supervision of a diploma paper, supervision of a study paper, etc.). According to the Lithuanian and Latvian approaches this concept also includes indirect contact hours (supervision of a research work, etc.). In Slovakia „teaching hours” mean only part of teaching and include only contact lectures.

The study was originally designed to conduct the compensation comparison, although it should be noted that countries have different approaches to salary formation. Higher Education Institutions in Lithuania are autonomous and have no fixed salaries for employees. This falls under the responsibility of universities themselves. In Latvia the minimum wage per one academic load is stipulated by the legislative acts.

In Slovakia, the average salary ranges from 759 to 1762 EUR (university teachers, 2013). In its turn, in Lithuania assistants' salaries in different universities vary from 502 to 732 EUR per month and professors' salaries fluctuate from 982 to 1726 EUR (Mrazauskaitė, 2015). It should be emphasised that the amount of salaries vary widely by country, as well as by academic staff positions. It is essential to note that the average salary in Latvia is not sufficiently different from the minimum wage, taking into account academic employment of staff on a part-time basis. The minimum wage is anticipated for assistants 481 EUR and professors 1175 EUR.

Conclusions

Research into the legal and financial work aspects of academic staff confirms common features and states differences across various EU countries. It shall be noted that mostly it is the existing autonomy of each university personnel policy. The main problems that emerged are different perceptions and approaches to formation of contact hours and the amount of the academic load, which makes it difficult to carry out a comparative research. In order to assess the extent of remuneration of academic staff and carry out a comparative analysis, it is necessary to study the structure of the academic load formation and perform an analysis of the hourly cost.

It can be positively evaluated that there is a flexible legislative approach to shaping hours in Latvia and Lithuania, where the amount of the academic load may vary significantly, however, it reduces the social guarantees for academic staff and can become an instrument of higher education institutions to balance the budget, which certainly cannot be accepted.

In the framework of the carried out comparative analysis on shaping the academic load, the latter appeared to be least attractive in Latvia exactly where the number of contact hours of the individual position groups is the highest. It is definitely vital to carry out further research on the remuneration systems in other countries, so that higher education institutions in Latvia can develop their own remuneration systems based on the positive experience of other EU countries.

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IEDZĪVOTĀJU AKTIVITĀTES UN EKONOMISKĀS ATTĪSTĪBAS NOVĒRTĒJUMS VRG TERITORIJĀ

Assessment of the Activity of Residents and Economic Growth in the LAG Territory

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Abstract. *Research on participation in local action groups and their influence on the overall development of regional territories has become urgent in recent years, given the implementation of the Rural Development Programme LEADER as well as the interpretation of local action groups as a new research object in theoretical and empirical research studies. The research aim is to assess the activity of residents in the territory of a particular local action group and the overall development of the territory in the period 2009-2013. In 2014, 40 local action groups operated in Latvia. The present research focuses on the territory of a local action group and its residents. The research provides socio-economic characteristics of the territory (changes in the numbers of residents and business entities and in wages) as well as identifies and assesses the opinions of residents on motivations and hindering factors to starting up a business. A statistical analysis of resident survey data, employing the contingency method, shows that increase in the education level reduces one's wish to start up a business and vice versa, whereas the age of the residents surveyed has no effect on their wish to start up a business.*

Keywords: *local action group, residents, entrepreneurship, factors, rural territory, partnership.*

Ievads

Introduction

Pētījumi par dalību Vietējās rīcības grupās (VRG) un to ietekmi uz reģionu teritoriju vispārējo attīstību aktualizējas pēdējos gados, ņemot vērā Lauku attīstības programmas LEADER realizāciju, kā arī VRG kā jauna pētījuma objekta interpretāciju zinātniskajos un praktiskajos pētījumos. Vietējā rīcības grupa (partnerība) ir vietējo organizāciju un lauku iedzīvotāju apvienība, kas darbojas noteiktā lauku teritorijā ar iedzīvotāju skaitu robežās no 5 līdz 65 tūkstoši, pārstāv šīs teritorijas iedzīvotāju intereses un rūpējas par lauku attīstības jautājumiem vietējā līmenī. Latvijas teritorijā 2014. gada darbojās

40 VRG. Šī pētījuma bāze ir vietējās rīcības grupas, kas ir dibinājuši partnerību, teritorija un tās iedzīvotāji. Partnerības mērķis ir uzlabot dzīves kvalitāti lauku iedzīvotājiem Rēzeknes novadā un Viļānu novadā, izmantojot sabiedrības līdzdalības principu gan attiecīgu programmatisku dokumentu izstrādē un apspriešanā, gan to ieviešanā un vietējo kopienu un sabiedrības attīstības darba veicināšanā, veicinot pašvaldību teritoriju attīstību. Partnerības darbības viens no galvenajiem uzdevumiem ir veikt pienākumus saskaņā ar Latvijas lauku attīstības programmu (Biedrība „Rēzeknes...”, 2013; Biedrība „Rēzeknes...”, 2015).

Līdzšinējā zinātniskā izpēte ārpus Latvijas aktualizē sekojošus problēmjautājumus, kas rada zinātnisko diskusiju VRG kā finanšu avots reģiona attīstībai (Varvažovská, 2013), VRG kā jauna sociālās infrastruktūras institūcija lauku iedzīvotāju iztikai (Atkočiūniene, 2006), VRG funkcionēšanas problēmas no sociālā kapitāla koncepta perspektīvas (Zajda, 2014), Vietējās iniciatīvas lauku vitalitātei un sociālajai integrācijai: Serbijas pieredze (Vujicic et al., 2013). Minētajos pētījumos dominē problēmas un izaicinājumi, kas ir aktuāli Latvijai un Latgales reģionam 1) VRG darbība teritorijās, kur samazinās iedzīvotāju skaits un līdz ar to arī teritoriju apdzīvotība; 2) iedzīvotāju mentalitāte ar relatīvi zemu ekonomisko aktivitāti un sabiedrisko iniciatīvu.

Pētījuma mērķis – sniegt novērtējumu par iedzīvotāju aktivitāti VRG teritorijā un teritorijas vispārējo ekonomisko attīstību 2009. – 2013. gadā.

Pētījumā tiek izmantota datu ieguves metode – anketēšana, datu apstrādes un interpretācijas metodes – monogrāfiski aprakstošā metode, kā arī analīzes, sintēzes, datu grupēšanas, grafiskās interpretācijas metode, statistikā (kontingences) metode. Lai noteiktu VRG teritorijā aptaujāto iedzīvotāju anketu apkopojumu un analīzi, raksta autores pielietoja sociālo zinātņu statistikas paketes (Statistical Package for the Social Science) datu un Microsoft Excel analīzes rīkus.

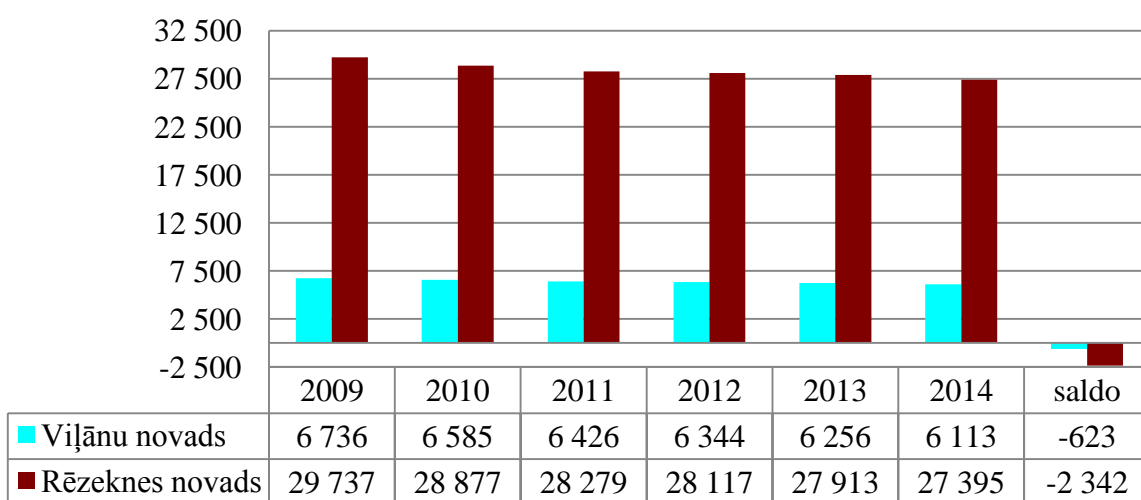
Raksts izstrādāts balstoties uz autoru veiktajiem pētījumiem „Rēzeknes rajona kopienu partnerības Lauku attīstības programmas 2007-2013.gadam pasākumā „Vietējās attīstības stratēģijas” ieviešanas izvērtējums un ieteikumi turpmākai darbībai”.

VRG teritorijas sociālekonomiskais raksturojums *Socio-economic characteristics of the LAG territory*

Rēzeknes un Viļānu novada teritorija sastāda 19.3 % no Latgales reģiona teritorijas un 4.35 % no Latvijas teritorijas. Iedzīvotāju blīvums laika posmā no 2009. līdz 2014. gadam Viļānu novadā samazinājās no 23 cilv. uz 1 km² līdz 21 cilv. uz 1 km², līdzīga tendence ir vērojama Latgales reģionā, kur iedzīvotāju blīvums minētajā periodā samazinājās no 22 cilv. uz 1 km² līdz 20 cilv. uz

1 km². Latvijā kopumā samazinājums bija 2 cilv. uz 1 km², t.i., no 33 cilv. uz 1 km² līdz 31 cilv. uz 1 km². Rēzeknes novadā laika posmā no 2009. līdz 2014. gadam iedzīvotāju blīvuma rādītājs palika nemainīgs 11 cilv. uz 1 km² (Biedrība „Rēzeknes...”, 2015; Mietule & Zvaigzne, 2015).

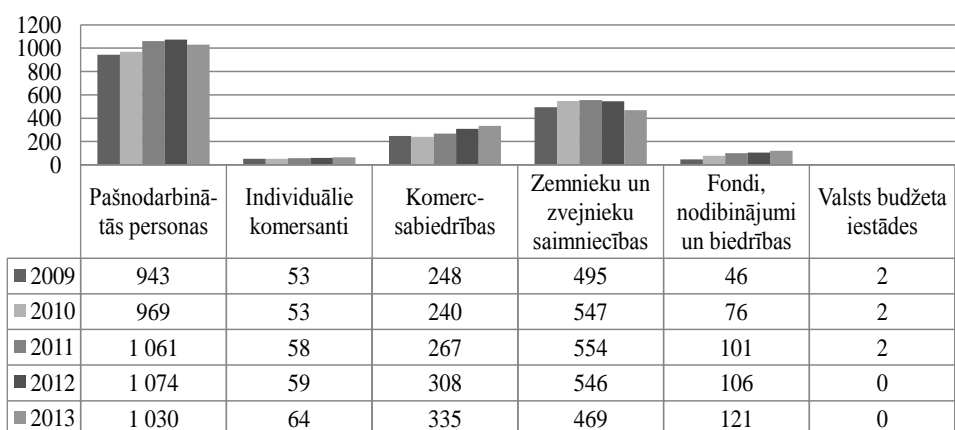
Absolūtajos skaitļos laika posmā no 2009. gada līdz 2014. gada sākumam Rēzeknes novadā iedzīvotāju skaits samazinājās par 2342 un Viļānu novadā par 623 iedzīvotāju (skat. 1.att.). Konkrētajā laika posmā Rēzeknes novadā iedzīvotāju skaita samazinājums sastāda 7.87 % savukārt Viļānu novadā – 9.25 %. Šajā laika periodā iedzīvotāju samazinājums Latgales reģionā sastādīja 11.39 % un Latvijā kopumā – 7.46 %.



1. att. Iedzīvotāju skaita izmaiņas Rēzeknes un Viļānu novadā 2009. – 2014. gadā (autoru veidots pēc Biedrība „Rēzeknes...”, 2015)

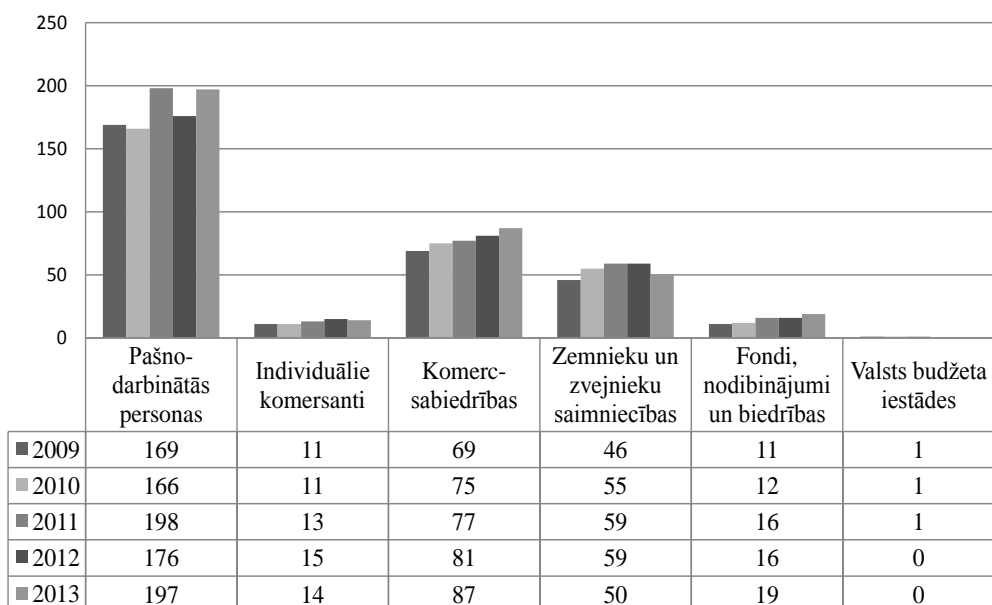
Figure 1 Changes in the number of residents in the municipalities of Rēzekne and Vilani in the period 2009-2014(compiled by the authors, based on the Biedrība „Rēzeknes...”, 2015)

Ekonomiski aktīvo statistikas vienību pozitīvā dinamika norāda uz ekonomiskās vides uzlabošanos. Centrālās statistikas pārvaldes dati parāda, ka laika periodā no 2009. gada līdz 2013. gadam gan Rēzeknes novadā, gan Viļānu novadā (skat. 2. un 3. att.) ir palielinājies visa veida uzņēmumu (komercsabiedrības, pašnodarbinātās personas, individuālie komersanti), izņemot zemnieku saimniecības, skaits. Pozitīvi vērtējama tendence ir arī fondu, nodibinājumu un biedrību skaita pieaugums, kas liecina par iedzīvotāju aktivitāti.



2. att. Ekonomiski aktīvās statistikas vienības Rēzeknes novadā 2009.-2013. gadā (autoru veidots pēc CSB datiem; Biedrība „Rēzeknes...”, 2015)

Figure 2 Number of economically active statistical units in Rezekne municipality in the period 2009-2013 (compiled by the authors, based on the CSB data ; Biedrība „Rēzeknes...”, 2015)



3. att. Ekonomiski aktīvās statistiskās vienības Viļānu novadā 2009-2013. gadā (autoru veidots pēc CSB datiem; Biedrība „Rēzeknes...”, 2015)

Figure 3 Number of economically active statistical units in Vilani municipality in the period 2009-2013(compiled by the authors, based on the CSB data ; Biedrība „Rēzeknes...”, 2015)

Iedzīvotāju aktivitāte LEADER pieejas pasākumu projektu realizācijā un motivācija uzsākt uzņēmējdarbību***Activity of residents in implementing LEADER approach projects and their motivation to start up a business***

Latvijas Lauku attīstības programmas 2007.-2013. gadam 413 pasākuma „Lauku ekonomikas dažādošana un dzīves kvalitātes veicināšana vietējo attīstības stratēģiju īstenošanas teritorijā” un 411 pasākuma „Konkurētspējas veicināšana vietējo attīstības stratēģiju īstenošanas teritorijā” ietvaros kopš 2009. gada janvāra ir noslēgušās 8 projektu konkursu kārtas, kur kopējais fondā pieejamais finansējums sastādīja 1.35 milj. EUR (Biedrība „Rēzeknes...”, 2015).

Pētāmajā teritorijā ELFLA projektu konkursu ietvaros Lauku atbalsta dienestam tika iesniegti 377 projekti, no kuriem tika apstiprināti 250 projekti. Tikai aptuveni ceturtdaļa no projektu iesniedzējiem sniedza un realizēja 1 projektu, attiecīgi lielākā daļā projektu iesniedzēju realizēja 2 un vairāk projektus. Projektu iesniedzēji galvenokārt pārstāv NVO sektoru. Otrā aktīvākā grupa jeb 10 % ir pašvaldības, savukārt attiecīgi – 7 % un 4 % no projektu īstenošanai ir fiziskas personas un komercdarbības sektors. Projekti tiek īstenoti VRG teritorijā, t.i., Rēzeknes novada pagastos un Viļānu novada pagastos un Viļānu pilsētā. Lielākais projektu īpatsvars novērojams rīcībā „Atbalsts sabiedrisko aktivitāšu dažādošanai vietējiem iedzīvotājiem”, kur kopā tika apstiprināti 117 projekti. Otrs rezultatīvākais rādītājs jeb projektu skaits ir rīcībā „Sociālo pakalpojumu pieejamības nodrošināšana”, kur tika apstiprināti 43 projekti. Vismazāk jeb 4 projekti apstiprināti rīcībā „Lauku māju un sētu (muzeju) izveide (rekonstrukcija, pagalmu labiekārtošana) un Kultūrvēsturisko objektu sakopšana” (Biedrība „Rēzeknes...”, 2015).

Projektu iesniedzēji norādīja arī trīs galvenās jomas, kurās plāno pieteikt un realizēt projektus nākamajā plānošanas periodā:

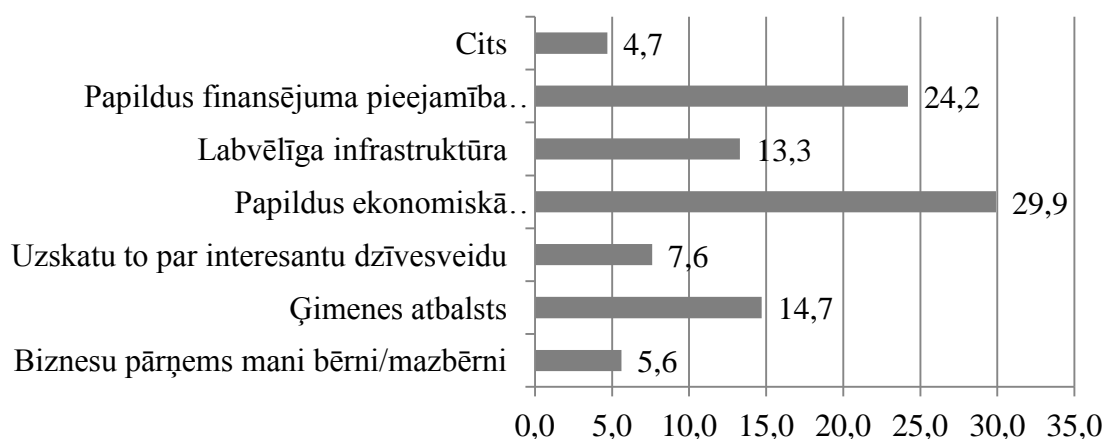
- aktīvās atpūtas veicināšana un sporta projekti;
- teritorijas labiekārtošanas projekti;
- kultūras pasākumu organizēšana, nodrošināšana.

Lai apkopotu iedzīvotāju viedokli par motivāciju veikt uzņēmējdarbību, kā arī apzinātu kavējošos faktorus, tika veikta nejaušās izlases aptauja. Aptaujā tika iegūtas 634 analīzei derīgas aptaujas anketas. Aptaujas rezultāti liecina, ka vidējais respondentu vecums ir 47 gadi. Latvijas iedzīvotāju vidējais vecums 2015. gada sākumā bija 42.4 gadi, t.sk., 39.1 gads vīriešiem un 45.1 gads sievietēm (salīdzinājumam – 2010. gada sākumā attiecīgi 41.2, 38.1 un 43.9). Gados jaunākie cilvēki (40.8 gadi) dzīvo Pierīgas reģionā, vecākie – Latgalē (43.8 gadi). Pensijas vecuma iedzīvotāju īpatsvars augstāks ir Latgales un Vidzemes reģionā (24.1 % un 23.5 %), bet zemākais rādītājs ir Pierīgas reģionā (20.8 %) (Biedrība „Rēzeknes...”, 2015).

Rezultāti liecina, ka visvairāk respondentu 31 % bija vecuma posmā 41-50 gadiem, tad seko 51-60 gadiem – 28 % un 30-40 gadiem – 19%.

Respondentu īpatsvars ar vidējo profesionālo izglītību sastāda 38 %, ar augstāko izglītību – 36 %, ar vidējo vispārējo izglītību – 20 %, ar pamatzglītību – 5 %. Lai arī 67.0 % aptaujāto ir algoti darbinieki, tomēr daži no viņiem paralēli algotam darbam savā māsaimniecībā veic saimniecisko darbību. Kā māsaimniekus sevi identificējuši 13.1 % aptaujāto. Pašnodarbinātas personas, kas nenodarbina citas personas ir 7.7 %, bet darba devēji vai pašnodarbinātas personas, kas nodarbina citus – 3.3 %. Ņemot vērā, ka kopumā respondentu skaits vairāk ir sievietes, tad arī ekonomiskais statuss visās pozīcijās sievietēm relatīvi ir augstāks. Viens no aptaujas anketas jautājumiem bija „Vai tuvākajā laikā esat apsvēris iespēju uzsākt savu uzņēmējdarbību?”, kā arī „Kas Jūs motivē/motivētu veikt saimniecisko darbību?”

Iedzīvotāju sniegtās atbildes liecina, ka tikai 9 % vēlētos tuvākajā laikā uzsākt savu uzņēmējdarbību. Lielākā daļa no aptaujātajiem neplāno sākt nodarboties ar uzņēmējdarbību dažādu šķēršļu dēļ: likumdošana un birokrātija, mazs tirgus pieprasījums/zema maksātspēja, ierobežota resursu pieejamība (darbaspēks, izejvielas, tehnika, iekārtas u.tml.). Pētot respondentu atbildes attiecībā pret dzimumu, var secināt, ka vīrieši ir vairāk motivēti uzsākt uzņēmējdarbību nekā sievietes. Uzsākt uzņēmējdarbību vairāk motivēti ir vīrieši, t.i., 16 % no visiem aptaujātajiem vīriešiem un 7 % no aptaujātajām sievietēm. Uzsākt uzņēmējdarbību vairāk motivēti ir iedzīvotāji ar augstāko izglītību – 34 aptaujātie jeb 15 % no visiem respondentiem ar augstāko izglītību, ar vidējo izglītību -7 % no visiem respondentiem ar vidējo izglītību, kā arī ar vidējo profesionālo izglītību – 13 aptaujātie jeb 5 %.



4.att. Faktori un apstākļi, kas iedzīvotājus motivē/motivētu veikt saimniecisko darbību, %-os (autoru veidots pēc Biedrība „Rēzeknes...”, 2015)

Figure 4 Percentage distribution of the factors and circumstances that motivate/would motivate residents to perform economic activity (compiled by the authors, based on the Biedrība „Rēzeknes...”, 2015)

Iedzīvotājus motivētu nodarboties ar saimniekošanu sekojoši faktori:

- ekonomiskā stabilitāte/neatkarība – 29.9 %;
- papildus finansējuma pieejamība uzņēmējdarbības uzsākšanai – 24.2 %;
- daļa iedzīvotāju kā motivāciju uzsākt uzņēmējdarbību saskata ģimenes atbalstā – 14.7 % un labvēlīgā infrastruktūrā – 13.3 %.

Pēc pieņēmuma, ka nākotnē daļa iedzīvotāju vēlēšies uzsākt uzņēmējdarbību, kā arī tiem, kas jau nodarbojas ar uzņēmējdarbību, tika uzdots jautājums par saimnieciskās darbības ietekmējošiem faktoriem. Šāds iedzīvotāju viedoklis ļautu veiksmīgāk izstrādāt partnerībai turpmākās stratēģijas nākamiem periodiem.

1.tabula. Saimniecisko darbību ietekmējošie faktori, kas būtu jāveicina VRG teritorijā (autoru veidots pēc Biedrība „Rēzeknes...”, 2015)

Table 1 Economic activity influencing factors to be promoted in the LAG territory (compiled by the authors, based on the Biedrība „Rēzeknes...”, 2015)

Saimnieciskās darbības ietekmējošie faktori	ļoti svarīgs		svarīgs		mazsvarīgs		nav svarīgs	
	skaitis	%	skaitis	%	skaitis	%	skaitis	%
Teritorijas popularizēšana plašākā mērogā (piemēram, sporta dienas, kultūras pasākumi)	166	26.2	359	56.6	95	15	14	2.2
Interneta pieejamība	341	53.8	243	38.3	40	6.3	10	1.6
Ceļu kvalitāte (klientu piekļuve, preču piegādes iespējas)	468	73.8	158	24.9	8	1.3	0	0
Pieejami konsultatīvie un atbalsta centri uzņēmējdarbības jautājumos	181	28.5	347	54.7	91	14.4	15	2.4
Regulāri organizēti mājrāzotāju un amatnieku tirdziņi	269	42.4	281	44.3	59	9.3	25	3.9
Darbaspēka pieejamība	128	20.2	347	54.7	143	22.6	16	2.5
Darbaspēka kvalifikācija, zināšanas, prasmes	281	44.3	305	48.1	40	6.3	8	1.3
Finanšu resursu, t.sk. kredītu, pieejamība	313	49.4	273	43.1	38	6	10	1.6
Apdzīvotība (iedzīvotāju skaits)	287	45.3	307	48.4	37	5.8	3	0.5
Telpas ražošanai, noliktavas, zemes resursi	238	37.5	333	52.5	52	8.2	11	1.7
Savstarpējā palīdzība un sadarbība (kaimiņu, draugu, partneru u.c.)	239	37.7	350	55.2	44	6.9	1	0.2
Informatīvie stendi, norādes (par tūrisma objektiem, muzejiem, organizācijām utt.)	145	22.9	364	57.4	107	16.9	18	2.8

Pamatā liela daļa no piedāvātajiem faktoriem tika novērtēti kā svarīgi. Kā ļoti svarīgus faktorus iedzīvotāji atzīmējuši (Biedrība „Rēzeknes...”, 2015):

- ceļu kvalitāti (klientu piekļuve, preču piegādes iespējas);
- interneta pieejamību;
- finanšu resursus, t.sk. kredītu, pieejamību.

Iedzīvotāju ir snieguši atbildes, ka dažkārt internets ir, bet to nav iespējams izmantot finanšu resursu trūkuma dēļ, sevišķi lauku teritorijās. Kā mazsvarīgi faktori tika nosaukti

- darbaspēka pieejamība;
- informatīvie stendi, norādes (par tūrisma objektiem, muzejiem, organizācijām utt.);
- teritorijas popularizēšana plašākā mērogā (piemēram, sporta dienas, kultūras pasākumi).

Kā galvenie šķēršļi ražošanas, pārstrādes un pakalpojumu attīstībai, t.sk., mājas apstākļos, tika norādīti likumdošana un birokrātija. Tāpat kā būtiski šķēršļi ražošanas, pārstrādes un pakalpojumu attīstībai, t.sk., mājas apstākļos iedzīvotāji norādīja:

- mazs tirgus pieprasījums/zema maksātspēja;
- ierobežota resursu pieejamība (darbaspēks, izejvielas, tehnika, iekārtas u.tml.);
- zināšanu trūkums uzņēmējdarbībā.

Lai noskaidrotu, vai pastāv sakarības starp aptaujāto iedzīvotāju „izglītību”, „vecumu” un „vēlmi uzsākt uzņēmējdarbību”, tika izmantota statistiskā-kontingences analīzes metode.

2. tabula. Iedzīvotāju sniegto atbilžu statistiskā analīze, izmantojot kontingences metodi (autoru aprēķini pēc Biedrība „Rēzeknes...”, 2015)

Table 2 Statistical analysis of the answers given by the population applying the contingency method (authors' calculations based on the Biedrība „Rēzeknes...”, 2015)

Analizējamie jautājumi	Sig. (2-tailed) (nozīmīguma līmenis)
Aptaujāto iedzīvotāju „izglītība” pret „vēlmi uzsākt uzņēmējdarbību”	p vērtība=0.0004096
Aptaujāto iedzīvotāju „vecums” pret „vēlmi uzsākt uzņēmējdarbību”	p vērtība=0.3905

Rezultāti liecina, ka cieša sakarība pastāv starp aptaujāto iedzīvotāju „izglītību” un „vēlmi uzsākt uzņēmējdarbību”, bet nepastāv sakarība starp aptaujāto iedzīvotāju „vecumu” un „vēlmi uzsākt uzņēmējdarbību”. Pēc kontingences metodes p vērtība ir nozīmīga robežās no 0.000 līdz 0.003 (Paura & Arhipova, 2002). Iedzīvotāju aptaujas statistiskās analīzes rezultāti parāda, ka paaugstinoties izglītības līmenim, samazinās vēlme uzsākt uzņēmējdarbību un

otrādi, savukārt aptaujāto iedzīvotāju vecumam nav ietekmes uz vēlmi uzsākt uzņēmējdarbību.

Secinājumi **Conclusions**

Ekonomiski aktīvo statistikas vienību pozitīvā dinamika norāda uz ekonomiskās vides uzlabošanos. Laika periodā no 2009. gada līdz 2013. gadam gan Rēzeknes novadā, gan Viļānu novadā ir palielinājies visa veida uzņēmumu (komercsabiedrības, pašnodarbinātās personas, individuālie komersanti), izņemot zemnieku saimniecības, skaits. Pozitīvi vērtējama tendence ir arī nevalstisko organizāciju skaita pieaugums, kas liecina par iedzīvotāju ekonomisko un pilsonisko rosību un dalību novadu sabiedriskajās aktivitātēs.

Lai radītu labvēlīgus priekšnosacījumus, iedzīvotāju vēlmei veidot savu uzņēmējdarbību, svarīgs faktors ir papildus informācijas un finanšu resursu pieejamība saimnieciskās darbības uzsākšanai.

Vērtējot iedzīvotāju ekonomisko stāvokli no vispārējā pieņēmuma – jo augstāks izglītības līmenis, jo lielākas iespējas darba tirgū un vairāk uzdrošinās kļūt par darba devējiem vai pašnodarbinātām personām, var secināt, ka vienlīdz nozīmīga ir gan augstākā, gan vidējā profesionālā izglītība.

Anketēšanas rezultāti parāda, ka tikai 9 % vēlētos tuvākajā laikā uzsākt savu uzņēmējdarbību; vairākums respondentu nedomā sākt nodarboties ar uzņēmējdarbību dažādu šķēršļu dēļ: likumdošana un birokrātija, mazs tirgus pieprasījums/zema maksātspēja, ierobežota resursu pieejamība (darbaspēks, izejvielas, tehnika, iekārtas u.tml.); pētot respondentu atbildes attiecībā pret dzimumu, var secināt, ka vīrieši ir vairāk motivēti uzsākt uzņēmējdarbību nekā sievietes.

Iedzīvotāju aptaujas statistiskās analīzes rezultāti parāda, ka paaugstinoties izglītības līmenim, samazinās vēlme uzsākt uzņēmējdarbību un otrādi, savukārt aptaujāto iedzīvotāju vecumam nav ietekmes uz vēlmi uzsākt uzņēmējdarbību.

Iedzīvotājus lielākoties motivētu nodarboties ar saimniekošanu sekojoši faktori – ekonomiskā stabilitāte/neatkarība; papildus finansējuma pieejamība uzņēmējdarbības uzsākšanai; daļa respondentu, kā motivāciju uzsākt uzņēmējdarbību, saskata ģimenes atbalstā un labvēlīgā infrastruktūrā.

Summary

Research on participation in local action groups and their influence on the overall development of regional territories has become urgent in recent years, given the implementation of the Rural Development Programme LEADER as well as the interpretation of local action groups as a new research object in theoretical and empirical research studies. In 2014, 40 local action groups operated in the territory of Latvia. The present research

focuses on local action groups that have founded a partnership and the territory and its residents. The partnership aims to raise the quality of life for rural residents in the municipalities of Rezekne and Vilani based on the principle of public participation both in designing and discussing and implementing relevant programme documents and in contributing to work on developing local communities and the society, thereby promoting the development of municipal territories. One of the key objectives of activity of the partnership is to perform its duties under the Rural Development Programme of Latvia.

The research aim is to assess the activity of residents in the territory of a particular local action group and the overall development of the territory in the period 2009-2013.

The positive changes in the number of economically active statistical units point to improvement in the economic environment. In the period 2009-2013, the number of all kinds of enterprises (commercial companies, self-employed persons and individual merchants), except for farms, increased both in Rezekne municipality and in Vilani municipality. A positive trend might be observed for non-governmental organisations, as their number also rose; it indicated the economic and civil activity of residents and their increasing participation in public activities in their municipalities.

To create favourable preconditions for residents to start up their own businesses, an important factor is the availability of relevant information and financial resources to start up a business.

After assessing the economic situation of residents based on a general assumption – the higher level of education residents have, the greater opportunities in the labour market they have and the more they are encouraged to become employers or self-employed persons – it can be concluded that higher education and secondary professional education are equally important.

According to the survey, only 9% of the residents wished to start up their own businesses in the nearest future; the majority of the respondents did not think of doing business because of various obstacles: legislation and bureaucracy, a small market, low demand/purchasing power, limited availability of resources (labour, raw materials, machinery, equipment, etc.). As regards genders, one can conclude that men were more motivated to start up a business than women.

The statistical analysis of the survey data shows that increase in the education level reduces one's wish to start up a business and vice versa, whereas the age of the residents surveyed has no effect on their wish to start up a business.

The residents would be mostly motivated to do business by the following factors: economic stability/independence; availability of additional funds to start up a business; part of the respondents perceive family support and good infrastructure as motivations to start up a business.

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KOMUNIKĀCIJAS ATTĪSTĪBA LATVIJAS VALSTS PĀRVALDĒ: IZMAIŅAS UN IZAICINĀJUMI

Development of Communication in Latvian Public Administration: Trends and Challenges

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Abstract. *Along with the decrease of administrative influences, the effective functioning of contemporary public administration needs the support and partnership of society. The necessity to consider the reaction of society obliges to inform and to create public understanding on decisions made by the public administration, as well as to ensure an opportunity for individuals to get involved in the decision making process. Thus, the role of communication in public administration performance increases. The regulation of the state needs increasingly greater public acceptance and approval both by responding to the public's position and wishes and by creating common values and standards that are often achieved by the communication process. In order to understand the role of communications in public administration processes, the author has studied the development of the public administration communication during several state reform stages in Latvia. Using qualitative research methods – interviews, document analysis and comparative analysis and quantitative content analysis –, the trends and challenges in the development of Latvian public administration communication were identified. It is possible to stress two important changes – firstly, the goal of public communications is not just to increase the awareness of the public, but also to involve the public in the state's development, and secondly, the transformation of communication changes the methods and the way of public administration communication.*

Keywords: *communication, political participation, public administration.*

Ievads

Introduction

Valsts pārvaldes galvenais darbības mērķis ir kalpot savas valsts iedzīvotājiem, veicinot valsts izaugsmi un iedzīvotāju labklājību atbilstoši demokrātiskā ceļā pie varas nonākuša politiskā spēka izvirzītajai programmai. “Demokrātisks režīms kā sabiedrības un taisnīgs varas izmantošanas paraugs nozīmē, ka kopienas vai sabiedrības locekļi, balstoties uz vienlīdzības principu un mijiedarbojoties, meklē veidus, kā rast taisnīgus risinājumus, saskaņojot dažādas intereses un centienus” (Jansone, Vilka, 2005). Lai nodrošinātu valsts attīstību atbilstoši iedzīvotāju vajadzībām un gaidām, ir nepieciešama sabiedrības līdzdalība valsts pārvaldē, veidojot dialogu un viedokļa apmaiņu, veicinot informācijas pieejamību un caurspīdīgumu. Uzturēta un īstenota

dažādos valsts pārvaldes līmeņos komunikācija ir būtiski ietekmējusi valdības lēmumu pieņemšanu un īstenošanu, vienojoties un veidojot attiecības starp agrāk nesaistītām sociālajām grupām un sistēmām (Loh, Chong, 2005). Tādējādi demokrātiskā valsts pārvaldē nozīmīga loma ir tās spējai veidot komunikāciju ar sabiedrību. Amerikas Savienoto Valstu (ASV) politikas pētnieks Ralfs Neiders uzver, ka: “Valstī, kur maksimāls spēks ir tautas gribai, ir skaidrs, ka brīva un tūlītēja informācija no valdības ir vienkārši nepieciešamība” (Nader, 2014). Vienlaikus komunikācijas pētnieki norāda uz dažādām komunikācijas problēmām starp valsts pārvaldi un sabiedrību, jo mūsdienu sabiedrībā pieaug indivīdu un sociālo grupu savstarpējā atkarība un rodas nepieciešamība pēc aizvien sarežģītākas sociālās, politiskās un ekonomiskās mijiedarbības. Pēc ASV pētnieka Marks Drapo teiktā, sabiedrība valsts pārvaldi uztver kā anonīmu, nezināmu, monolītu, kaut ko bezpersonisku vai pat neuzticamu (Drapeau, 2009). Tādējādi sabiedrības informēšanas mērķim jābūt vērstam uz informētas, izglītotas un lemtspējīgas sabiedrības veidošanu, savukārt atgriezeniskā saite ir uzticības pamats valsts pārvaldei.

Latvijas valsts pārvaldes darbībā kopš valsts neatkarības atjaunošanas nozīmīga vieta ir atvēlēta attiecību veidošanai ar sabiedrību, lai nodrošinātu sabiedrības informēšanu un izpratnes veidošanu par valsts pārvaldes lēmumiem, kā arī lai veicinātu sabiedrības līdzdalību lēmumu pieņemšanā. Tātad Latvijas valsts pārvaldes darbībā ir mēģināts attīstīt divvirzienu komunikāciju starp valsti un sabiedrību. Šī raksta mērķis ir noteikt būtiskākos attīstības posmus, problēmas un turpmākos izaicinājumus Latvijas valsts pārvaldes komunikācijā, kas vērsta uz mijiedarbības veidošanu starp valsti un iedzīvotājiem. Kā pētījuma metodes rakstā izmantotas: dokumentu analīze, kas ietver Latvijas valdības pieņemto normatīvo dokumentu analīzi, kuri ir noteikuši komunikācijas mērķus valsts pārvaldē, tādējādi ir izsekotas komunikācijai atvēlētās lomas izmaiņas dažādos Latvijas valsts pārvaldes reformu posmos; ekspertu aptauja, veicot daļēji strukturētas intervijas ar Latvijas ministriju komunikācijas speciālistiem, lai noskaidrotu komunikācijas īstenošanas praksi un problēmas valsts pārvaldē; kvantitatīva satura analīze Valsts kancelejas uzturētajiem profiliem sociālajos medijos, lai noteiktu sabiedrības ieinteresētību un iesaisti valsts pārvaldes komunikācijā. Balstoties uz valsts pārvaldes komunikācijas pētnieku nostādnēm, analizējot Latvijas valdības pieņemtos normatīvos dokumentus, ministriju komunikācijas speciālistu viedokļus, kā arī valsts iestāžu profilu saturu sociālajos medijos, raksta ietvaros ir pētīti Latvijas valsts pārvaldes komunikācijas attīstības posmi, pielietotās komunikācijas metodes, pastāvošā prakse un iespējamie izaicinājumi, kas ir saistīti ar valsts pārvaldes grūtībām veicināt sabiedrības ieinteresētību un iesaistīšanos, mazinot sabiedrības distancēšanos un uzticēšanās trūkumu valsts pārvaldei.

No sabiedrības informēšanas uz iesaisti valsts pārvaldē
From informing to involving the society in public administration

Valsts pārvaldes komunikācijas attīstībā ir notikušas dažādas transformācijas: mainījusies tās loma un nozīme, izvirzītie mērķi un pielietotās metodes. Lielā mērā katrā valstī izmaiņas tās pārvaldes komunikācijā ir bijušas atšķirīgas, ko noteikuši vairāki faktori, piemēram, politiskā attīstība, izmaiņas sabiedrības politiskajā kultūrā un arī masu komunikācijas procesi. Tomēr vairumā gadījumu ir vērojamas arī kopīgas transformācijas tendences: daudzviet valsts pārvaldes komunikācija ir attīstījusies no vienvirziena informācijas izplatīšanas līdz mijiedarbībai ar sabiedrību, tās iesaistīšanai valsts pārvaldē. Daudzi komunikācijas pētnieki norāda, ka mūsdienās nozīmīgs valsts pārvaldes darbinieku uzdevums ir veicināt un motivēt iedzīvotāju iesaistīšanos valsts pārvaldē, vienlaikus atzīstot, ka sabiedrības līdzdalība parasti palēnina un apgrūtina lēmumu pieņemšanas procesu, taču tā palielina iespēju, ka pieņemtie lēmumi atbildīs sabiedrības viedoklim (Katlips, Senters, Brūms, 2002).

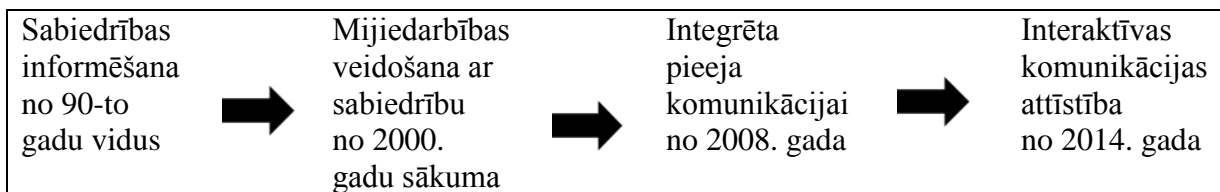
Sanktpēterburgas Valsts Universitātes Filozofijas un politoloģijas katedras docents Arkādijs Rusakovs, analizējot komunikācijas attīstību valsts pārvaldē un izvērtējot vairāku valstu praksi, atzīmē trīs būtiskākos attīstības posmus (Rusakov, 2006). Pirmais posms no 20.gs. 20-tajiem gadiem līdz 20.gs. vidum, kad, pieaugot sapratnei par nepieciešamību informēt sabiedrību par valsts pārvaldes darbību, tiek veidotas pirmās komunikācijas struktūrvienības valsts pārvaldē un attīstīts sabiedrības informēšanas darbs. Otrajā posmā no 20. gs. vidus – 20. gs. 90-tajiem gadiem ir vērojama arvien lielāka sabiedrības aktivitāte, vērtējot valsts pārvaldes darbu, un iesaistīšanās valsts pārvaldes procesos. Tādējādi rodas nepieciešamība ne tikai nodrošināt sabiedrības informēšanu, bet arī veicināt sabiedrības izpratni un atbalstu valsts pārvaldei, skaidrojot un pamatojot valsts pārvaldes pieņemtus lēmumus. Arvien vairāk valsts pārvaldē veidojas izpratne, ka sabiedrības attieksme pret valsts pārvaldi, tās tēls sabiedrības ir viens no faktoriem, kas var ietekmēt valsts pārvaldes darbības efektivitāti. Trešajā posmā no 20. gs. 90-tajiem gadiem līdz mūsdienām valsts pārvaldes komunikāciju ar sabiedrību būtiski ietekmē informācijas tehnoloģiju attīstība un komunikācijas kanālu daudzveidība, kas mudina valsts pārvaldi pārskatīt gan komunikācijas lomu, gan pielietotās metodes.

Savukārt Nīderlandes pētnieks Pīters Jansens, analizējot komunikācijas lomu un attīstību savas valsts pārvaldē, atzīmē četrus posmus (Jansen, 2010). Pirmajam posms „*About*” 1950.-tajos – 1960.-tajos gados ir raksturīga sabiedrības informēšana par valsts pārvaldes ikdienas darbu, nevis pieņemtajiem vai plānotajiem lēmumiem. Tā ir izteikti vienvirziena komunikācija, kurā dominējoša loma ir valsts institūcijām kā komunikācijas iniciatoriem. Šajā posmā vienīgo atgriezenisko saiti nodrošina žurnālistu interese un to uzdotie

jautājumi par valsts pārvaldes darbu. Otrajā posmā „*As*” 1970.-tajos – 1980.-tajos gados noris pāreja no pasīvās uz aktīvo komunikāciju, valsts pārvaldes lēmumu pieņemšanas procesā un komunikācijā iesaistot sabiedrību. Trešajā posmā „*For*” no 1980.-to gadu beigām līdz 1990.-tajiem gadiem attīstās interaktīvā komunikācija, kad komunikācija valsts pārvaldē sāk kļūt kā nozīmīga daļa no politikas veidošanas procesa un lēmumu pieņemšanā arvien vairāk tiek iesaistīti komunikācijas speciālisti. Ceturtajā posmā „*In*” no 21. gs. valsts pārvaldes komunikācija jau ir neatņemama daļa no politikas veidošanas. Tas lielā mērā sakrīt arī ar ASV sabiedrisko attiecību pētnieks Lī Mordekajs teikto, ka komunikācija nav nošķirama no valdības darba, jo pati „valsts pārvalde ir sabiedriskās attiecības” (Mordecai, 2007).

Analizējot komunikācijas attīstību atjaunotās Latvijas Republikas valsts pārvaldē, ir saskatāmās līdzīgas tendences. Latvijas valsts pārvaldes komunikācijas stratēģiskie mērķi pirmoreiz tika definēti 1995. gadā, Ministru kabinetam pieņemot „Valsts reformu koncepciju”, kurā viens no reformas virzieniem tika vērsts uz pārmaiņām valsts varas un sabiedrības attiecībās. Šo reformu mērķis bija nodrošināt iedzīvotāju iesaistīšanos un ieinteresētību valsts pārvaldes procesos, kā arī iespēju katram sabiedrības loceklim iegūt aktuālu, skaidri uztveramu un precīzu informāciju par valsts pārvaldes darbību un attiecībām starp valsti un sabiedrību (Latvijas Valsts reformu koncepcija, 1995). No 2001.gada komunikācijas politiku valsts pārvaldē noteica Ministru kabinetā apstiprinātās „Valdības komunikācijas politikas pamatnostādnes 2001. – 2007. gadam”, kuru mērķis ir valsts pārvaldes un iedzīvotāju efektīva mijiedarbība. Pamatnostādnēs tika noteikti valdības komunikācijas principi un galvenie uzdevumi, kuri tika vērsti uz sabiedrības līdzdalības palielināšanu lēmumu sagatavošanas un pieņemšanas procesā, uz sabiedrības izpratnes veidošanu par valsts pārvaldes darbu, kā arī uz valsts pārvaldes komunikācijas darba organizācijas sistēmas sakārtošanu (Valdības komunikācijas pamatnostādnes, 2001). Tātad var secināt, ka Latvijas valsts pārvaldes darbībā iezīmējas, ka komunikācijas stratēģiskais mērķis ir vērsts divvirzienu komunikācijas veidošanu starp valdību un sabiedrību. Turpinot valdības komunikācijas pēctecību 2007. gadā izstrādātās „Valdības komunikācijas politikas pamatnostādnes 2008. – 2013. gadam” kā politikas mērķi definēja valsts pārvaldes un sabiedrības efektīvas mijiedarbību. Pamatnostādņu galvenie virzieni bija vērsti uz stratēģiskas un koordinētas valdības komunikācijas īstenošanu, definējot komunikāciju kā politikas veidošanas neatņemamu sastāvdaļu, uz efektīva valdības un sabiedrības dialoga veidošanu, īstenojot komunikācijas un līdzdalības integrāciju visos politikas izstrādes un īstenošanas posmos un līmeņos, kā arī uz klientu apkalpošanas kultūras ieviešanu valsts pārvaldē, nodrošinot iedzīvotāju vajadzībām atbilstošus pakalpojumus (Valdības komunikācijas pamatnostādnes, 2008).

Savukārt 2014. gada valsts pārvaldes komunikācijas attīstības stratēģiskie aspekti tika iekļauti “Valsts pārvaldes politikas attīstības pamatnostādnes 2014.-2020.gadam”, kā mērķi nosakot sabiedrības tiesiskās apziņas stiprināšanu un iesaistīšanu lēmumu pieņemšanas procesos un mūsdienīgas komunikācijas nodrošināšanu. Tam paredzēti vairāki uzdevumi, kuri ir vērsti uz valsts pārvaldes un sabiedrības sadarbības veidošanu, efektīvu informācijas apmaiņu un viedokļu saskaņošanu, kā arī inovāciju ieviešanu valsts pārvaldes komunikācijas darbā (Valsts pārvaldes politikas attīstības pamatnostādnes, 2014). Tomēr neraugoties uz pieņemtajiem dokumentiem komunikācijas lomā un valsts pārvaldes institūciju centieniem veidot mijiedarbību un dialogu starp valsts pārvaldi un sabiedrību, iedzīvotāju ieinteresētība un līdzdalība valsts pārvaldes lēmumu sagatavošanas un pieņemšanas procesos un uzticēšanās valsts varas institūcijām Latvijā ir samērā zema.



1. att. **Komunikācijas lomas izmaiņas Latvijas valsts pārvaldē (autores veidots attēls)**
Figure 1 Changes in the communication role in Latvian public administration (author's construction)

Kopumā novērtējot Latvijas valsts pārvaldes komunikācijas attīstību (skat. autores veidoto 1.att.), balstoties uz reglamentējošiem politikas plānošanas dokumentiem, ir nosakāmi četri galvenie attīstības posmi. Pirmajā posmā valsts reformu procesu sākumā no 1990-to gadu sākuma līdz 1990-to gadu beigām kā valdības komunikācijas stratēģisks mērķis bija izvirzīts mērķis padarīt komunikāciju kā neatņemamu valsts pārvaldes darbības sastāvdaļu, ietverot gan sabiedrības informēšanu, gan iesaistīšanu. Šajā laika posmā tika uzsāktas pirmās valsts pārvaldes īstenotās sabiedrības informēšanas kampaņas, lai nodrošinātu Latvijas iedzīvotāju informēšanu par viņu tiesībām un pienākumiem attiecībā ar valsti. Vienlaikus vērojama tendence, ka sabiedrības informēšanas resursi valsts pārvaldē tiek izmantoti institūcijai vai politiķa publicitātes veicināšanai. Otrajā posmā no 2001. gada, Ministru kabinetam apstiprinot „Valdības komunikācijas politikas pamatnostādnes”, valsts pārvaldē arvien lielāka uzmanība tiek veltīta divvirzienu komunikācijas attīstībai, akcentējot sabiedrības un valdības mijiedarbības veidošanu un vienlaikus veicinot arī sadarbību un koordināciju starp ministrijām. Sākot no 2008. gada ir vērojami mēģinājumi attīstīt un dažādot valsts pārvaldē izmantotās komunikācijas metodes, tā, piemēram, no 2008. gada Valdības komunikācijas pamatnostādnes ir iezīmēta

integrētās mārketinga komunikācijas pieeja. Valsts pārvaldes komunikāciju neapšaubāmi ietekmē arī informācijas tehnoloģiju attīstība un arī sabiedrības komunikācijas paradumu maiņa, arvien vairāk ikdienas saziņā izmantojot sociālos medijus. Tādējādi 2014. gadā apstiprinātās Valsts pārvaldes politikas attīstības pamatnostādnes paredz un arī komunikācijas prakse valsts pārvaldē norāda uz tendencēm izmantot jaunas komunikācijas iespējas, arvien vairāk ieviešot dažādus e-risinājumus, tostarp arī sociālo mediju izmantošanu.

Komunikācijas vieta un pielietotās metodes Latvijas valsts pārvaldē *Role of communication and methods applied in Latvian public administration*

Pētot pastāvošo praksi Latvijas valsts pārvaldes iestādēs un novērtējot komunikācijas nozīmi valsts pārvaldē, autores veiktās izpēte liecina, ka vairums valsts pārvaldes komunikācijas speciālisti izprot komunikāciju kā stratēģisku valsts pārvaldes funkciju, kas realizējama visos lēmumu pieņemšanas procesa posmos: izpētes, lēmuma pieņemšanas, realizācijas un ieviešanas novērtējuma laikā. Tomēr šis optimālais komunikācijas modelis, kas ir ietverts arī valdības komunikācijas pamatnostādņēs, ne vienmēr tiek īstenots, un komunikācija bieži tiek uztverta nevis kā iespēja veidot dialogu ar sabiedrību, bet gan tikai kā sabiedrības informēšana par valsts pārvaldes darbu, turklāt pamatā izmantojot diezgan vienveidīgus informācijas nodošanas kanālus, piemēram, iestādes mājas lapu vai piedāvājot informāciju masu medijiem preses reližu formā. Līdz ar to samērā nepilnīgi ir izmantotas komunikācijas iespējas viedokļu apmaiņas veidošanā starp valsts pārvaldi un sabiedrību, kas ļautu gan izzināt sabiedrības vajadzības un gaidas, gan novērtēt iespējamo lēmumu ietekmi uz sabiedrības vajadzībām un palīdzētu izskaidrot valsts pārvaldes pieņemtos lēmumu nozīmi.

Valsts pārvaldes institūciju komunikācijas speciālisti kā būtiskākās problēmas min komunikācijas daudzpusīgās nozīmes nenovērtēšanu un tās sniegto iespēju nepilnīgu izmantošanu, resursu (finanšu un cilvēkresursu) nepietiekamību, kas ierobežo komunikācijas iespējas, reizēm arī komunikācijas speciālistu atbilstošas kvalifikācijas un izpratnes trūkumu. Mijiedarbības veidošanu starp valsts pārvaldi un sabiedrību un līdz ar to divvirzienu komunikācijas attīstību kavē tas, ka reizēm sastopama nepietiekama sabiedrības iesaistīšana lēmumu pieņemšanā, un nereti arī gadījumos, kad tā tiek veikta, izpildot formāli un virspusēji. To kavē arī zemā sabiedrības ieinteresētības un nepietiekamā vēlme iesaistīties valsts pārvaldes lēmumu pieņemšanas procesos. Līdz ar to vairumā gadījumu valsts pārvaldes iestāžu komunikācijā lielākā loma ir atvēlēta sabiedrības informēšanai, kaut gan ir vērojama virzība uz lielāku sabiedrības iesaisti. Maz uzmanības tiek veltīts tādām aspektam kā valstiskas pašapziņas audzināšana, kas radītu sabiedrības pārliecību un uzticību šai valstij.

Apkopojot ekspertu viedokļus par galvenajiem komunikācijas uzdevumiem valsts pārvaldē, jāsecina, komunikācijas speciālisti to novērtē kā ļoti būtisku, jo demokrātiskā sabiedrībā svarīga ir viedokļu apmaiņa starp valsts pārvaldi un sabiedrību, pie tam valsts pārvaldes komunikācijas speciālisti akcentē nepieciešamību attīstīt divvirzienu komunikāciju, veidojot dialogu un iesaistot sabiedrību lēmumu pieņemšanas procesos, tādējādi neaprobežojoties tikai ar sabiedrības informēšanu. Nenoliedzami svarīgs un sarežģīti īstenojams uzdevums ir valsts pārvaldes iestādes tēla veidošanu, ko ietekmē gan sapratne un atbalsts no iestādes vadības puses, gan arī komunikācijas struktūrvienību spēja pārliecināt kolektīvu par iestādes tēla veicinošu rīcību. Bieži vien komunikācijas speciālistu pienākumos ietilpst arī konsultāciju sniegšana iestādes vadībai komunikācijas jautājumos, kas pamatā aptver sadarbību ar masu medijiem, retāk – lēmuma iespējamo ietekmi uz sabiedrisko domu, līdz ar to ne vienmēr komunikācija tiek izmantota kā stratēģisks instruments.

Aplūkojot valsts pārvaldes komunikācijā izmantotās metodes, visbiežāk valsts pārvaldes iestāžu komunikācijas darbā tiek pielietotas mediju attiecības, ietverot gan preses relīzes, preses konferences, tikšanās ar žurnālistiem, intervijas. Tāpat valsts pārvaldes iestāžu komunikācijas struktūrvienību vadītāji par nozīmīgu uzdevumu uzskata sabiedrības iesaisti, kas tiek nodrošināta, organizējot darba grupas, sabiedriskās apspriešanas, konsultācijas. Atsevišķās iestādēs apmeklētājiem ir izveidoti arī informācijas centri vai vienas pieturas aģentūras, dažas iestādes izdod elektroniskos izdevumus. Samērā maz valsts pārvaldes komunikācijā tiek veikti padziļināti un visaptveroši pētījumi, lai novērtētu īstenotās komunikācijas ietekmi un noteiktu sabiedrības attieksmi un vajadzības. Šādiem pētījumiem nepietiek finanšu līdzekļu, visbiežāk pētniecība aprobežojas ar mediju monitoringu, kā arī mājas lapas statistiku un komunikācijas aktivitāšu uzskaiti. Ierobežoto finanšu resursu dēļ samērā reti tiek izmantotas komunikācijas kampaņas, speciālie pasākumi vai sociālās reklāmas. Tikai atsevišķos vai īpašos gadījumos iestādes ir rīkojušas komunikācijas kampaņas ar maziem budžetiem vai ar Eiropas Savienības finansējumu attiecīgo programmu ietvaros. Savukārt kā samērā attīstīta joma ir minama iestāžu sadarbība ar nevalstiskajām organizācijām, kuras ir gan nozīmīgs informācijas ieguves avots, gan tiek iesaistītas lēmumu pieņemšanas procesos. Pakāpeniski ir vērojama dažādu jaunu komunikācijas metožu attīstība: gan informatīvie e-pasti, gan iestāžu mājas lapu pilnveidošana, gan sociālo mediju izmantošana.

Turpmākie izaicinājumi Latvijas valsts pārvaldes komunikācijas attīstībai *Future challenges in the development of communication for Latvian public administration*

Kā viens no būtiskākajiem jauninājumiem ir paredzama arvien plašāka sociālo mediju izmantošana Latvijas valsts pārvaldes komunikācijā. Valsts kancelejā ir tikušas izstrādātas vadlīnijas sociālo platformu izmantošanai valsts iestāžu darbā. Jau kopš 2009. gada Valsts kanceleja un arī citas iestādes ir attīstījušas jaunus kanālus komunikācijai ar iedzīvotājiem. Piemēram, Valsts kanceleja ir izveidojusi profilus vairākos sociālajos tīklos, kuriem ir ļoti atšķirīgs sekotāju skaits (skat. autores apkopotos datus uz 2016. gada februārī 1.tab.).

1. tabula. **Valsts kancelejas profili sociālajos tīklos un sekotāju skaits 2016. gadā (autores veidota tabula)**

Table 1 State Chancellery profiles in social media and the number of followers in 2016 (author's calculations)

Valsts kancelejas profili sociālajos tīklos	Sekotāju skaits	Procentos
https://twitter.com/Brivibas36	11 6555	93.97
http://www.draugiem.lv/latvija/	6827	5.50
https://www.youtube.com/user/valstskanceleja	246	0.19
https://www.instagram.com/Brivibas36/	243	0.19
https://www.flickr.com/photos/valstskanceleja	147	0.11
https://www.linkedin.com/company/office-of-the-prime-minister-of-latvia	62	0.04

Papildus tam pastāv arī Ministru kabineta sēžu vadības sistēma ePortfelis, nodrošinot iespēju saņemt Valsts sekretāru sanāksmes, MK komitejas un sēžu materiālus, kā arī MK mājaslapā ir pieejama iespēja parakstīties uz jaunumu saņemšanu par tiesību aktu projektiem. ePortfeļa pakalpojumam ir virs 1000 lietotāju, tai skaitā NVO pārstāvji, savukārt jaunumu saņemšanu izmanto ap 1400 lietotāju (Dreimane, 2011). Valsts pārvalde komunikācijā ar sabiedrību ir centusies attīstīt arī citas mūsdienīgas komunikācijas formas, piemēram, Valsts kancelejas izveidotā mobilā aplikācija „Futbols” Apvienoto Nāciju Organizācijas rīkotajā mobilo lietotņu konkursā „World Summit Award Mobile” ir ierindota starp 40 labākajām pasaulē un novērtēta kā TOP5 mobilā aplikācija pasaulē kategorijā „m-valdība un līdzdalība” (Valsts kanceleja, 2014). Plašu rezonansi un popularitāti ieguvis arī valdības uzturētais profils “If you like Latvia, Latvia likes you” sociālajā tīklā Facebook.com ar 96 320 sekotājiem.

Kopumā var secināt, ka pagaidām sociālo mediju lietotāju skaits Latvijas valsts pārvaldes komunikācijā ir samērā neliels, lai gan iedzīvotāji arvien biežāk izmanto jaunas formas sava viedokļa paušanai un informācijas iegūšanā. Interneta forumi un komentāri, sociālie tīkli, emuāri un mikroblogi ir biežāk sastopamās jaunās publisko diskusiju formas, kurās ne tikai iespējams informēt sabiedrību un veidot tās viedokli par būtiskiem jautājumiem, bet arī veicināt iedzīvotāju sadarbību kopēju sociālu problēmu risināšanā.

Tātad valsts pārvaldei ir potenciāls uzlabot komunikācijas rezultātus, izmantojot tiešsaistes sadarbību un dalīšanos ar informāciju. Daudzi pētnieki atzīst, ka valsts pārvaldes komunikācijas izaicinājums slēpjas valsts pārvaldes inertumā: ievēlētajiem politiskajiem līderiem un valsts pārvaldes darbiniekiem jāpārvar kulturālās barjeras, kas stāv ceļā daudz atvērtākai, brīvas formas stila komunikācijai (Drapeau, 2009). Amerikāņu informācijas tehnoloģiju pētnieks Endijs Blūmentāls uzsver, ka sociālie mediji ir spēcīgs fenomens, kas var likt organizācijām pielāgoties un pieņemt jaunus darbības principus (Blumenthal, 2009). Pie tam lielāka atvērtība un informācijas pieejamība mazinās pārvaldes slogu, racionalizējot politisko lēmumu pieņemšanas procesu (Macmillan et al, 2008), jo ievērojami palielinātu pilsoņu līdzdalības darbības lauku un sasniedzamību (Lange, 2008). Informācijas tehnoloģijas turpinās attīstīties un kļūs daudz vērtīgākas valsts pārvaldei un tās ieinteresētajām pusēm.

Latvijā šī mijiedarbības ar sabiedrību forma pakāpeniski attīstās, iestādēm veidojot profilus sociālajos tīklos un izmantojot citas interaktīvas komunikācijas iespējas. Arī Latvijas ilgtspējīgas attīstības stratēģija līdz 2030. gadam „Latvija 2030” paredz e-pārvaldības un sabiedrisko inovāciju attīstību, lai valsts pārvaldi veidotu efektīvāku, atvieglotu pilsoņu iespējas piedalīties referendumos un parakstu vākšanā gan vietējā, gan nacionālā līmenī. (Latvijas ilgtspējīgas attīstības stratēģijā līdz 2030. gadam „Latvija 2030”, 2010).

Tādējādi komunikācijas tehnoloģiju attīstība ienes valsts pārvaldē gan jaunas politiskās līdzdalības, gan jaunas komunikācijas formas, sociālajiem tīkliem un citiem jaunajiem medijiem topot par publisko debašu vietu ar lielām interaktivitātes iespējām, kas spēj nodrošināt valsts pārvaldes komunikācijā atgriezenisko saiti ar sabiedrību. Tomēr šai komunikācijas formai piemīt arī vairāki trūkumi, piemēram, interneta forumos un komentāros bieži vien ir pārstāvēts ļoti nelielas sabiedrības daļas viedoklis, sastopams zems komunikācijas ētikas sliekšnis un konstruktīvu priekšlikumu trūkums.

Secinājumi *Conclusions*

Mūsdienu informācijas tehnoloģiju un integrētās mārketinga komunikācijas laikmetā bieži vien izšķiroša loma ir valsts pārvaldes spējai veidot komunikāciju

ar sabiedrību. Kā uzsver komunikācijas pētnieki, ja izpildvarai vai likumdošanas varai neizdodas pievērst uzmanību tās programmai vai tās lēmumiem, tad tā nespēj gūt sabiedrības atbalstu un galu galā cieš neveiksmi.

Attīstoties informācijas un komunikācijas tehnoloģijām, mainoties sabiedrības komunikācijas paradumiem, Latvijas valsts pārvaldes komunikācijas būtiskākais izaicinājums ir spēja atrast un pielietot jaunus sadarbības un līdzdalības mehānismus, kas veidotu un vairotu ikviena iedzīvotāja līdzatbildību par valsts izaugsmi un sabiedrības labklājību. Tātad arī valsts pārvaldes komunikācijā ar sabiedrību arvien izšķirošāka nozīme būs jaunāko informācijas tehnoloģiju un to iespēju prasmīgai pielietošanai, gan izvēloties atbilstošas komunikācijas formas, gan veidojot tās saturu.

Noslēgumā sniedzot priekšlikumus Latvijas valsts pārvaldes komunikācijas turpmākajai attīstībai, minami šādas pilnveidošanas iespējas: valsts pārvaldes komunikācijā pilnvērtīgāk izmantojamas jaunākās informācijas tehnoloģijas, attīstot interaktīvu komunikāciju, kas rosinātu sabiedrību uz kādu noteiktu rīcību vai vismaz dalīšanos ar informāciju savā lokā; ņemot vērā sabiedrības komunikācijas paradumu izmaiņas, nepieciešams dažādot valsts pārvaldes informācijas izplatīšanas veidus un izmantot daudzveidīgākus kanālus, vienkāršojot saturu un padarot to vairāk vizuāli uztveramu; valsts pārvaldes lēmumu pieņemšanas procesā parādīt dažādus veidus, kā iedzīvotāji var iesaistīties tajos un kādu rezultātu tas var sniegt kā valsts attīstībā, tā sabiedrības un indivīda izaugsmē, tādējādi mazinot sabiedrības distancēšanos un zemo uzticēšanos valsts pārvaldes institūcijām. Turpmākā valsts pārvaldes komunikācijas attīstība saistāma arī ar pastiprinātu sadarbību starp dažādām valsts iestādēm, paplašinātu valsts pārvaldes piedāvājumu interneta lietotājiem.

Summary

Nowadays, in the era of information technologies and integrated marketing communication, a crucial role is often played by the ability of state administration to communicate with the public. As emphasised by researchers, if executive or legislative power fails to attract the public's attention to its programmes or decisions, it cannot gain the public's support and eventually suffers failure.

As information and communication technologies developed and the public's communication behaviour changed, the most important challenge of Latvia's state administration is the ability to find and apply new cooperation and participation mechanisms that would contribute to and increase any resident's co-responsibility regarding the country's economic growth and the society's wellbeing. This means that in the state administration's communication with the public, an increasingly crucial role is played by the application of the newest information technologies and their options when choosing appropriate communication forms and shaping the content of communication.

Finally, giving proposals on further communication development for Latvia's state administration, the following opportunities may be mentioned: in communication, the state administration has to widely use the newest information technologies, focusing on interactive communication that would encourage the public to do some action or at least to share their information among their community; given the change in the public's communication behaviour, it is necessary for the state administration to diversify the ways and channels of disseminating its information, simplifying the information content and making it better visually perceivable; in the decision-making process, the state administration has to present various ways how residents can engage in it and how it can contribute to the country's development and the growth of the public and individuals, thereby reducing the public's disassociation from and low level of trust in state administration institutions. The further development of the state administration's communication should be associated with stronger cooperation among various government institutions and greater opportunities provided by the state administration for Internet users.

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COMMUNICATION MODELS AND COMMON BASIS FOR MULTICULTURAL COMMUNICATION IN LATVIA

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Abstract. *Different models serve not only as a frame for communication, they can help to rise problems as well as discuss them. This article introduces with the four communication models starting from Aristotle's triangle model and ending with a more contemporary one. The authors try to find out, which is the most appropriate model for intercultural communication in Latvia? The empirical data collected from two focus-groups representing different cultures in Latvia serves as a base for interpretation of current situation where communication challenges can occur as a result of interaction between people with different cultural backgrounds. The article approves the idea to elaborate the new specific model for multicultural communication, and after analysis highlights the base and components of this new model.*

Keywords: *communication, models, multiculturalism, cultural differences, elements of communication.*

Introduction

Almost any organization in Latvia has to deal with employees, partners or clients from different cultures. Such condition can pose challenges, but at the same time it can be beneficial. In a global and a diverse world, we can leverage these advantages and mitigate the risks through both awareness and complexity of communication. Communication models from dominant to alternative ones are being discussed and used continuously, but the problem occurs when we try to implement the specific communication model in the selected group of people with different backgrounds. The lack of awareness about communication models and the absence of multicultural communication competence could be the reasons why people from different cultures in Latvia annoy each other and cannot find a common language. Question of research: How to overcome cultural differences in communication using models of communication? In order to create the new specific model of multicultural communication, authors highlight the different communication models and examine their usage between people with different cultural backgrounds.

Communication is not only transportation of messages, nowadays communication is more of sharing ideas and feelings and willingness to participate. Ancient Greek philosopher Aristotle provides an explanation of communication that is still worthy of attention. His study of communication called „rhetoric” speaks about the elements within the process. Aristotle provides us with this insight: rhetoric falls into three divisions, determined by the three classes of listeners to speeches. For the three elements in speech-making – speaker, subject, and person addressed – it is the last one, the hearer that determines the speech's end and object (Aristotle, 350 BC: part 3). Here Aristotle speaks of a communication process composed of a speaker, a message and a listener. Note, he points out that the person at the end of the communication process holds the key whether or not communication takes place. Since Aristotle the communication process has been studied by many promoters of models. They designed certain formats adapted to different situations and types of communication. The use of models allows the interpretation of phenomena using certain structures that link the elements and relationships that can exist between these elements. (Popescu, Pargaru, Popescu, Mihai, 2015:65) They are vitally necessary because both biological and social life of society exists through a process of transmission. Without the communication of ideals, hopes, expectations and practices from those members of society who are passing out of the group life to those who are coming into it, social life could not survive. It makes communication both pleasant and essential. The famous communication scholar from US Joseph DeVito accounted at least five main reasons why we communicate. They are: 1) to influence people, 2) to establish/maintain interpersonal relationships, 3) to acquire knowledge, 4) to help people, 5) to play. (DeVito, 2013: 11). The authors of communication's definitions have tried to say something unique about this process in which messages are sent and received with a specific aim via communication channels through noise which envelops the communication channels, the sender and receiver and feedback. The communication is primarily understood in the sense of transmission. (McQuail, 2005:26). However, the professor emeritus from University of Amsterdam Dennis McQuail agrees with the idea of American philosopher John Dewey that there is more than a verbal tie between the words in common, community, and communication. People efforts to put communication into a precise frame led to development of communication models. At the core of modeling is the fundamental notion, that models are approximations of the real world. (Sokolowski J.A., Banks C.M., 2010:1). In this very first step in modeling, model is created according to the real world, and vice versa – model can be modified after testing.

Aristotle Model of Communication

According to Aristotle, the speaker plays a key role in communication. He is the one who takes complete charge of the communication. The sender first prepares a content which he does by carefully putting his thoughts in words with an objective of influencing the listeners or the recipients, who would then respond in the sender's desired way. No points in guessing that the content has to be very impressive in this model for the audience or the receivers to get convinced. The model says that the speaker communicates in such way that the listeners get influenced and respond accordingly (Aristotle, 350 BC, part 3).

The speaker must be very careful about his selection of words in this model of communication. In other words, think before you act, as advises DeVito (DeVito, 2013:20). Speaker would explore the target audience and then prepare his speech. For example, the politician must understand the needs of the people in his constituency like the need of a shopping mall, better transport system, safety of society and then design his speech. The speech should address all the above issues and focus on providing the solutions to their problems to expect maximum votes from them. His tone and pitch should also be loud and clear enough for the people to hear and understand the speech properly. Stammering, getting nervous in between of a conversation must be avoided. Voice modulations also play a very important role in creating the desired effect. Blank expressions, confused looks and similar pitch all through the speech make it monotonous and nullify its effect. The speaker should know where to lay more stress on, highlight which words to influence listeners. One will definitely purchase the mobile handset from that store where the salesman gives an impressive demo of the mobile. It depends on the salesman what to speak and how to speak in a manner to influence the listeners so that they respond to him in a way he actually wants i.e. purchase the handset and increase his billing. The Aristotle model of communication is the widely accepted and the most common model of communication where the sender sends the information or a message to the receivers to influence them and make them respond and act accordingly. Aristotle model of communication is the golden rule to excel in public speaking, seminars, lectures where the sender makes his point clear by designing an impressive content, passing on the message to the second part and they simply respond accordingly. Here the sender is the active member and the receiver is passive one.

Shannon and Weaver's Model of Communication

This model was introduced in the middle of the last century, is particularly designed to develop the effective communication between sender and receiver. This is however, a model of signal processing. Shannon and Weaver did not rise

the question of the content or message that was transferred. They found factors which affects the communication process called “Noise”, but the model also deals with various concepts like information source, transmitter, noise, channel, message, receiver, channel, information destination, encode and decode. In this model the sender is the originator of message or the information source selects the desired message. Encoder is the transmitter which converts the message into signals (Shannon, Weaver, 1948:380). Nowadays with “converting” we understand not only signals like waves or binary data which are compact-able to transmit the messages through cables or satellites, but usage of words, symbols and signs to express an idea. If the message is distracted by noise, it will affect the communication flow between sender and receiver. During this process the messages might be distracted or affected by physical noise like sounds, thunder and crowd noise or encoded signals may distract in the channel during the transmission process which affect the communication flow or the receiver may not receive the correct message. Despite on latest findings of Joseph DeVito, who divides noise into four parts: physical noise, physiological noise, psychological noise and semantic noise (DeVito, 2013:8), the Shannon and Weaver model clearly deals with external noises which affect the messages or signals from external sources. This model helps us to understand the components, their role and structure of communication.

Berlo’s Model of Communication

While the Aristotle model of communication puts the speaker in the central position and suggests that the speaker is one who drives the entire communication, the Berlo’s model of communication takes into account the different aspects of the message (content, elements, treatment, structure, code) and equalizes both sender and receiver. Berlo’s model of communication operates on the SMCR pattern (Berlo, 1960: 124). In the SMCR pattern S - Source; M – Message; C – Channel; R – Receiver; the source also called the sender is the one from whom the thought originates. Sender transfers the information to the receiver carefully placing his ideas into words. The ideal communication occurs when both sender and receiver have the common expertise in communication skills, the same attitude, knowledge, social system and culture. These factors play a significant role in the communication process and level of encoding and decoding. Berlo’s model differs from Shannon and Weaver’s model mostly because it emphasizes the common understanding, which is significant part of communication. Despite on the criticism of Berlo’s model (model leaves no place for feedback, there is no barriers, filters or feedback), it has its own preferences. The most important contribution from Berlo can be the idea that meanings are not in the message, they

are in the message users, and therefore communicators must be explored from perspective of their background.

Schramm's Interactive Model of Communication

In his Circular Model Schramm embodied idea that communication is a circular process by nature. Schramm conceived of decoding and encoding as activities maintained simultaneously by sender and receiver; he also made provisions for a two-way interchange of messages (Schramm, 1961: 5-6). In this model, encoder is who originates and sends the message. Decoder is who receives the message and interpreter could be any person trying to understand and analyze, perceive or interpret. From the starting point of communication to the end an interpretation goes on. This model breaks the traditional sender and receiver models; each person acts as both sender and receiver and hence uses interpretation. Encoding, decoding and interpretation is going on simultaneously. Semantic noise is a concept introduced here when sender and receiver apply different meaning to the same message. It happens mostly because words and phrases are not understandable, so certain words and phrases will cause you to deviate from the actual meaning of communication.

Multiculturalism

The man of a postmodern age has been rooted in new orders determining his/her everyday reality, where existence involves answering many questions of primal nature, including communication. Alicja Szerlag stressed the role communication into process of understanding and tolerating other cultures (Szerlag, 2015: 137). The definition of culture has long been a controversy because culture as a phenomenon on the object level is constructed in the discursive process by forming various concepts (Budin, Vol.I) . Very popular United Nations Educational, Scientific and Cultural Organization definition considers the culture as complex which includes knowledge, beliefs, morals, laws, customs, and any other capabilities and habits acquired by a human as a member of society.¹ Center for Advanced Research on Language Acquisition from University of Minnesota for purpose of intercultural studies project defines culture as the shared patterns of behaviors and interactions, cognitive constructs, and affective understanding that are learned through a process of socialization.² It means, the essence of culture is not artifacts, and different tangible cultural elements but how the members of specific group interpret, use, and perceive them.

¹<http://www.unesco.org/new/en/social-and-human-sciences/themes/international-migration/glossary/cultural-diversity/>

²<http://www.carla.umn.edu/>

It is the values, symbols, interpretations that distinguish people in modern societies. This idea was dominant for Dutch scientist Geert Hofstede to develop his onion model (Hofstede G., Hofstede G.J., 2005:26) If for Michelle LeBaron the culture is like underground river which runs through our lives and relationships, giving us messages that shape our perceptions, attributions, judgments, and ideas of self and other³ at the same time, we have to bear in mind that culture is ordinary (Williams, 1958:2). Though culture is powerful, it is often unconscious, influencing conflict and attempts to resolve conflict in imperceptible ways. Culture is more significant than language, costumes and foods. Cultural groups may share race, ethnicity, or nationality, but they also arise from cleavages of generation, socioeconomic class, sexual orientation, ability and disability, political and religious affiliation, language, and gender⁴. Multicultural ideology refers to overall evaluation of the majority group addressing the degree to which they possess positive attitudes toward immigrants and cultural diversity. (Arends-Toth, Vijver, 2003: 249-266) Multiculturalism is viewed as a paradox in dealing with the question of how to construct a society that accommodates universal rights with the rights of minority groups. (Dong, Day, Collaco, 2005:27-38). Any group of people consists of individuals, therefore capacity of individual plays the main role in intercultural communication, and different individuals have various values.

These values are communicated through rituals, heroes and symbols. Sometimes, they are as ordinary as a napkin. However, even ordinary symbols can have a powerful influence on relationship and the ultimate success or failure of an encounter. It could easily happen, if one uses the moral standards of one culture to judge the other. That other culture will invariably appear to be morally inferior. (Hofstede, Pedersen., Hofstede, 2002:19-69). The researcher Benjamin M. Cole suggests that high-context communicators utilize content management practices – which alter message content characteristics – and context management practices (Cole, 2015:585) which either rely on, tear at temporarily, or attempt to reprogram more permanently the shared understandings through which messages are being delivered and interpreted.

Key Findings of Focus Group Discussions

The objective of empirical research was to find out: 1) How different cultural backgrounds can influence the selection of communication model? 2) Which components of models are primary for multicultural communication, and how the specific model of multicultural communication should look like? Empirical research was conducted from September 10 to September 12, 2015. The focus

³<http://www.beyondintractability.org/essay/culture-conflict>

⁴<http://www.beyondintractability.org/essay/culture-conflict>

group discussion was chosen as a form of qualitative research to get opinion of representatives of different cultures. Criteria for participation was nationality, legal status (citizens of LR versus non-citizens of LR), and social status. Two focus groups organized according to nationality Latvian and Tajik were gathered with ten participants in each. Participants (in total 20 persons) included opinion's leaders, artists, teachers, state social workers, employers and NGO managers. During the two hours 12 significant topics from the communication's field ((1) role of sender, (2) role of receiver (3) role and choice of communication channel, (4) reconciliation of values of sender and receiver, (5,6,7,8) the technical, physical, physiological, psychological noises, (9) barriers in communication, (10) necessity of feedback, (11) usage of signs and symbols, (12) recognition of models of communication)) similar to both groups were discussed to find out the structure and components of new possible model for intercultural communication.

Authors examined, categorized and indexed the data to make conclusions. Summary of empirical research: all Tajiks and eight of the Latvian participants have a contact with representatives of different cultures every day, two Latvians have contacts less than once in week. All of the participants evaluated their experience in communication with different cultures above mediocre, 3,8 from 5 in average. The main factors influenced the opinion about representatives of different cultures in descending order were the own experience of participants, family, friends, mass media, and politicians. Nine representatives of the Latvian group and all ten representatives of the Tajik group expressed the willingness to learn more about different cultures, the same proportion was indexed for willingness to communicate with representatives of different cultures. 10 Tajik correspondents and 9 Latvians were interested in cooperating and communicating with representatives from other cultures. After analyzing the communication models it came out that Latvians were more stressed in the role of channels and sender in communication but for Tajiks both parts the sender and the receiver played a significant role. Personality of communicator means a lot for both Tajiks and Latvians. Here they totally relied on Aristotle's model. Latvians put charisma and honesty of a partner in the first place, while Tajiks stressed the attitude and leadership. Tajiks are more flexible than Latvians towards using the third language as lingua franca, they are more patient and ready to adapt requirements of communication circumstances. The crucial necessity to provide the dialogue for mutual benefit according to Schramm's model was widely expressed and became undisputable after discussions.

Combined model of communication between people of different cultural background

The models mentioned above show the variety of concepts for transferring the message. As far as a choice of model depends on many characteristics, we cannot simply choose the one model and ignore the others. Therefore, the authors were interested to unify concepts from different models for communication in a multicultural environment to justify idea of Tomas Garza that attaining comfort and fluidity in multicultural communication is surprisingly easy (Garza T., 2015: 23). The figure 1 below shows how the combination of communication models looks like from the point of authors according to different cultural background of people.

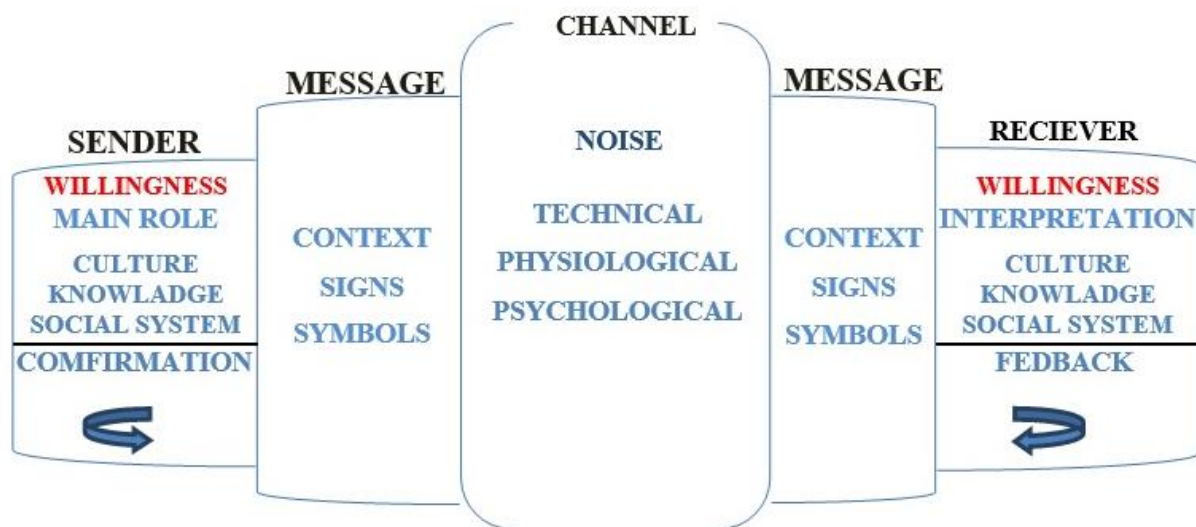


Figure 1 **Combined model of communication between people of different cultural background (done by authors)**

The sender plays the main role in this model because participants of focus groups admitted the significance of it. This corresponds with the idea of Aristotle. Sender creates the message based on his culture, knowledge, and social system he belongs to. The importance of context is undisputable according to findings of authors. The channel of communication must be chosen adequately in order to avoid noises such as fatigue, bad mood, and lack of time, wrong assumption or reputation. The noise could shape the message and receiver again has to have willingness to interpret it. After getting the immediate feedback sender confirms how received message matches with the original one. The most important components of this model are willingness and conformity from both sides the sender and the receiver. Words in red color indicate the contribution of the authors on the recommended combination model of communication (CMC) in Latvia. Willingness and other elements from the sender’s side should minimize the wrong

encoding and decoding of message. Receiver by interpreting the message reflect its willingness to receive message and correctness of message through feedback to the sender. Then there is a confirmation part which approves the correctness of message and shows the ongoing nature of communication's circle.

Conclusion

The authors propose the integration of elements from Aristotle's, Berlo's, Shannon & Weaver's and Schramm's models as the key to succeed in intercultural communication by adding to the model the element of interpretation and confirmation of the feedback. In this combination of the most known models of communication the speaker plays 'main role', because the speaker takes initiative and opens an adequate channel. From the model of Shannon and Weaver authors want emphasize the idea that communication consists of transmitting the messages by using the adequate channel of communication. Unfortunately, the role of personalities and content of message in this model is a minimal. For this reason, communicators should use the model of Berlo to develop these elements. According to Berlo, the role of the receiver is even more significant than the sender but authors, according to the results of focus-groups, consider that the sender has more responsibility to find form, structure and context which allows easy understand the message. By focusing on this, the authors want to stress the role of people and their experience based on cultural background.

Although meanings have always been changing, and two people do not have the same meaning for anything in the most cases, people with similar experience have a privilege to communicate more easily. On the one hand, such experience rises the capacity to communicate with other people, on the other hand, it is absolutely necessary, because the postmodern rhetorical theory claims to take two minds to make truth. One of the biggest mistakes in communication process, according to the focus-group results, is to consider it finished. This gives as straight approve to Schramm's idea that communication naturally has a form of a circle. Circulation from Schramm's model gives us feedback, the interpreted decoding, which is the representation of the meaning received. However, confirmation of the feedback seems necessary to keep the communication ongoing and make sure that the message is understood as it was aimed. The study also showed that leaders emphasized the principles of dialogue, including the willingness to understand the partner, communicator's accuracy, the adequate channel and responsibility of sender of information; but the first of all they stressed the goal of all process. It corresponds with the idea of Anderson (Anderson, 1994:295) that intercultural adaptation is a motivated and goal-oriented process. Findings of authors approved the necessity of new, specific

model of multicultural communication, and provided with information necessary for construction of this model.

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MAIN CHALLENGES AND OPPORTUNITIES FACED BY THE NONPROFIT SECTOR IN CURRENT POLAND

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Abstract. *There are over 100 000 nonprofit organizations registered in Poland that constitute a growingly important actor in the economic area and for the public administration. The sector has been growing, yet there are many factors that distract nonprofit organizations from carrying out many of their missions and goals and from playing many of the important functions in a society that are or were expected from them. This paper presents the main challenges and opportunities faced by the nonprofit sector in Poland in the recent years and at the beginning of 2016 as well as both the negative and positive trends observed in its development. A stress will be put on the relations between nonprofit organizations and the government and the process of governmentalization will be described.*

Keywords: *governmentalization, Polish nonprofit organizations, Polish nonprofit sector.*

Introduction

There are over 100 000 nonprofit organizations registered in Poland that constitute a growingly important actor in the economic area and for the public administration. The nonprofit sector is more and more important economically, as it employs a growing number of citizens and is selling more and more services. It is also an increasingly important partner for public administration, as public institutions are contracting more and more public tasks to nonprofit organizations.

The sector has been growing, yet there are many factors that distract nonprofit organizations from carrying out many of their missions and goals and from playing many of the important functions in a society that are or were expected from them.

The aim of this paper is to present the main challenges and opportunities faced by the nonprofit sector in Poland in the recent years and at the beginning of 2016 as well as both the negative and positive trends observed in its development. The paper will analyze most important dimensions of the functioning of the nonprofit sector in Poland and the focus will be put on the relations between nonprofit organizations and the government, which is the most interesting and most threatening area for the identity of the nonprofit sector in Poland. At the end of the paper there will be presented the threats and hopes for

the nonprofit sector connected with the new party in power after the presidential and parliamentary elections that took place in 2015.

The analysis that will be presented comes from the qualitative research of the Author (in-depth interviews with people working in the nonprofit organizations), the research in which the Author participated¹, a review of the quantitative research on the Polish nonprofit sector done by others, knowledge gained at various conferences and seminars devoted to this topic, own experience of working in the Polish nonprofit sector and living in Poland, and, recently, opinions raised by nonprofit sector activists during numerous meetings with Government Plenipotentiary for Civil Society² and reflection on the Author's observations.

Legal environment

The Polish nonprofit sector is mostly regulated by the Act on Public Benefit Activity and Voluntary Work, which was passed in 2003 and is often called the constitution of the third sector.

The passing of the Act was the first step out of the chaos prevalent since the political changes, although experts claim that some chaos accompanied the sector for many years on, in which both organizations and officials were learning the new law, which abounded in many ambiguous interpretations.

The most important dimension of the Act was that the Act made it compulsory for local governments to pass annual programs of cooperation with nonprofit organizations and gave them ability to outsource the realization of various public tasks to nonprofit organizations. The Act also divided the activity of nonprofit organizations into statutory unpaid, statutory paid and an economic activity. The novelty was the activity of statutory paid services for which organizations could charge fees without having to register economic activity³ as long as the salaries of people providing these services did not exceed a certain level.

The Act also introduced a status of public benefit organization. Organizations that receive this status can receive 1% of individual citizens' tax liabilities. Unfortunately, relatively few organizations benefit from the 1% mechanism. Although the percentage of citizens transferring 1% of the tax liabilities to public benefit organizations rose from less than 3% in 2004 to 45% in 2014 (Ministry of Finances, 2005, 2015), funds from 1% go in large part to

¹ For over 10 years I have been conducting every years experts' panels as part of Civil Society Organizations Sustainability Index research project, commissioned by the USAID and covering an increasing number of countries in Central and Eastern Europe, Asia, Africa and Middle East. See the bibliography for references.

² To which I have been an advisor since Jan. 2016 and I have been participated in those numerous consulting meetings.

³ Which entails many additional duties and taxes and make it impossible to participate in certain public tenders.

the so-called sub-accounts for individuals, run by just a few organizations⁴. Another problem with the 1% mechanism is that many citizens began to treat this 1% as a substitute for donations and stopped donating money to organizations.

Apart from the Act on Public Benefit Activity and Voluntary Work there are also an Act on Foundations and an Act on Associations⁵, which regulate some aspects of registration and other specific issues with regard to these two legal organizational forms.

As far as the registration of organizations in Poland is concerned, it is too complicated, lengthy and require from organizations submission of too many documents. Despite of common technical advancement it is still impossible to register an organization through the Internet. For the last several years there has been also a problem with finding 15 people required to register an association. Many people, not being able to find these 15 people, registered a foundation instead, even without any capital. In 2015 the Law on Associations was amended. Among the most important changes there was the decrease from 15 to 7 of the minimal number of people who can register an association, which might decrease the level of the mentioned pathology when many smaller groups with no capital instead of associations create a foundation, which in Poland do not require endowments. Other changes were: shortening of the time for consideration of the registration application to 7 days, abolition of supervision of the local government over the process of registration of an association. The Amendment in the Law on Associations limited thus the political control over the registration of an association (and thus political acceptance for the activities it wants to carry out). These changes concern only associations. It is still quite difficult to register a foundation. The procedure of registering a foundation remains bureaucratic, complicated, and lengthy, and is much more complex even from the procedure of registering of a limited liability company.

Another problem connected with the registration is that in Poland there is no obligation to deregister an organization which is not functioning anymore and nothing has been done in this regard. New organizations are registered every year and their absolute number has been growing. But also many stop functioning. Due to no obligation to deregister it is impossible to say how many out of over 100 000 registered organizations in Poland are actually active and whether the number of active organizations has been growing or decreasing. It is estimated that around 70% of registered organizations are active.

⁴ The idea of 1% mechanism was to support public benefit organizations. Instead, a few organizations created numerous sub-accounts, on which they collect the money from 1% and by taking a small amount to themselves they support the therapy of other needs of individual children.

⁵ Act from April 6th, 1984 on Foundations *with later changes* and Act from April 7th, 1989 on Associations *with later changes*.

What remains problematic for nonprofits is that they still must submit reports to various institutions, each in a different format, which is burdensome, especially for smaller organizations. They also complain of numerous inspections, mostly from granting institutions, which can span ten to fifteen days per year and thus hinder organizations' activities. Such inspections generally focus on documentation and do not assess the extent to which granted money serves the public benefit. Internal management is not regulated, law is very superficial in this regard.

Nonprofits in Poland can legally sell products and services, either through economic activities if they are registered also as a business entity or by selling mission-related products or services to recover costs. Organizations can compete for government contracts at both the local and central levels, though engaging in business activities disqualifies organizations from the right to participate in some public bids. The public procurement system has social clauses that contractors must fulfill or receive more assessment points for, for instance, employing people with disabilities, the long-term unemployed, or youth. It gives nonprofits more chances to win a bid. On the other hand, organizations often have to have their own contribution (partly financial) to the realization of certain projects, which makes many of them unable to participate in bidding procedures. Most organizations prefer to apply for public funding than make their own money through commercial activities. More local authorities buy services from local nonprofits.

Employees, volunteers and associations' members

Employers

Although more and more Polish citizens work in the nonprofit sector, the Polish nonprofit sector is based on unpaid work performed by volunteers or associations' members. 45% of organizations do not have any paid employees, 35% have any paid employees (regardless of the type of employment contract) and only 20% of organizations have at least one employee on a regular permanent employment contract (*Praca płatna i społeczna*, 2016). Employees of the nonprofit organizations more and more openly express their criticism over the fact that most of them have only project-based, short-term (and not permanent) contracts, and are forced to voluntary work which they do not want to perform. They debunk a myth that all nonprofits' employees work mostly for mission. It comes together with professionalization of the nonprofits and a new generation of people (today's young people are more assertive and less eager to work long hours for free). Young people treat the work for/in nonprofits as a regular paid-job and want a regular employment contract. In the opinions of organizations' leaders, main problems faced by the employees of Polish

nonprofits are: too low wages (55%), lack of promotion opportunities (47%), too much work (45%) and mentioned before lack of employment stability (34%) (*Praca płatna i społeczna*, 2016). In 2015 a new labor union of nonprofit sector⁷ employees came into being and one could notice the growth of the discussions (seminars, conferences) on the working conditions in the nonprofit organizations.

Volunteers

Opinions and data from various research about volunteering in Poland are ambiguous. It might depend on how volunteering is understood and on the type of questions asked in the research. For many it is only formal engagement in nonprofit organizations, while others consider as volunteering all types of social engagement without enumeration (such as helping sick neighbors or performing various activities at parishes).

According to research done by KLON/JAWOR Association, 20% of Poles engage in volunteering (*Wolontariusze i członkowie*, 2015) and this percentage has not been changing over several years. People who run volunteers' centers⁶ in Poland claim that more and more people come to their centers, willing to work for free for others. Some nonprofit sector's experts claim that it is more and more difficult for organizations to find volunteers as people more and more often engage in informal activities (like informal urban movements, often around particular actions) and not in formally registered organizations (which is also civic engagement and might in itself be considered also as a positive development), while according to others there might be more and more volunteers, especially among young people, who just seek work experience (in such cases volunteering is not truly voluntary but results from a high unemployment rate)⁷.

Associations' members

The membership of Polish associations has been decreasing for years (*Wolontariusze i członkowie*, 2015). There are a few reasons for that.

One of them is that most associations typically do not try hard to seek new members. So called public benefit organizations⁸ seek support from citizens primarily during campaigns when they try to persuade citizens to designate 1 percent of their tax liabilities to their organization.

⁶ Relations during the meeting of representatives of 8 volunteers' centers from various Polish cities with Government Plenipotentiary for Civil Society on Feb. 12, 2016.

⁷ Civil Society Organizations Sustainability Index Research Panel, Institute of Public Affairs, Nov. 4th, 2015.

⁸ Organizations with public benefit status that enables them to receive 1% of tax liabilities of the citizens. Among the conditions that have to be fulfilled to receive such a status there are: conducting of public benefit activities listed in the Act on Public Benefit Activity and Voluntary Work Such for at least 2 years and the functioning of the controlling body within an organization.

Large membership organizations have also become smaller due to their focus on donors rather than on their members. They also rather look for professional employees, not unprofessional members or volunteers (professionalization of organizations). Big membership makes it also difficult to run an organization as it is difficult to find the time where the majority of members will be able to come to meet up and membership organizations make it necessary to consult the members on all important decisions. It is time consuming and slows down the process while often quick decisions have to be made. For this reason there are also more and more foundations registered in the recent years in comparison to associations, as foundations by definition and by law do not have members.

It also seems that fewer people want to be ‘artificial members’ who have no say in anything or are only ‘on paper’, in documents. As it was already mentioned, for many years the Law on Associations required 15 members to register an association and many people were members only because they were asked for it by their friends. Due to this requirement of a certain number of members to register an associations, in the recent years in Poland there has been a growing number of foundations registered, in comparison with associations (*Wolontariusze i członkowie*, 2015). The capital necessary to register a foundation in Poland is very low. It amounts to 1000 PLN (around \$250). Indeed, there has been more and more difficult in recent years to find the required 15 people to create an association and, for this reason, with the amendment to the Law on Associations in 2015 the number of required members to register an association was decreased from 15 to 7.

Among people who really want to make a difference there are also more and more of those who instead of joining the existing organizations where all roles are established prefer to create their own organizations or act informally. Indeed, informal movements and actions have been gaining popularity in recent years in Poland. Also so called participatory budgets (in which local citizens vote on projects listed on the website of the local authorities and local authorities fund the project with the highest number of the vote) are gaining more and more popularity.

Public image

Media coverage of nonprofit organizations in Poland is quite problematic⁹. It focuses on financial scandals involving organizations and large protests or events having an impact on politics, rather than the positive daily impact of

⁹ Opinions expressed during Civil Society Organizations Sustainability Index Research Panel, Institute of Public Affairs, Nov. 4th, 2015.

various activities of the nonprofit organizations. The only regular activities that receive routine coverage revolve around assistance to poor children or people with disabilities. Despite years of organizations' efforts to engage journalists in their work, the media remains unaware of much of the sector's work. Few journalists are interested in the activities of the nonprofits. On the other hand, nonprofits themselves do not use up the time on TV or radio available for them. From 2011 there has been a law obligating Polish National TV channels and the Polish National Radio to devote a certain amount of time every day (9 minutes) to the promotion of activities of organizations with public benefit status. Most organizations, however, do not know that they have such an opportunity or do not know how to prepare a TV spot. Moreover, it is very expensive to produce a social campaign spot and the free time is often available at night time.

The media coverage (focus on scandals) influences public perception of the nonprofit organizations. They are often perceived as interest groups, with their political and particular (also financial) interests as organizations, not organizations looking after social interest. 48% of Poles think that in nonprofit organizations funding is often misused and people act for their private interest¹⁰. More citizens seem to recognize the activities of nonprofit organizations, primarily those of charities and large organizations that receive national media coverage or are very active in the 1 percent campaigns. Few people, however, are aware of the diversity of the sector, differentiate between associations and foundations and know the term: nongovernmental organizations.

Nonprofit organizations are better and better at public relations and are actively creating their image. Thanks to the development of technologies and the Internet they can in a cheaper way promote their activities and they do so.

Finances of nonprofit organizations

The growing problem of nongovernmental organizations in Poland (even though the name would suggest otherwise) is their growing dependence on public funding.

Although 60% of organizations collect memberships' fees (*Finanse organizacji pozarządowych*, 2015), those fees are really low and do not constitute a significant value in money. In 2011 they constituted only 7% of the sector's income (*Podstawowe fakty...*, 2013).

Looking generally, the use of the already mentioned 1 percent mechanism - an option for taxpayers to designate 1 percent of their tax obligations to an organization with public benefit status - has for years continued to increase. For the 2014 tax year, around 12.5 million individuals designated 557 million zloty

¹⁰ Data received from the KLON/JAWOR Association's research team.

(approximately \$141 million), around 50 million zloty more than in 2013, to the 7,888 organizations that are eligible for this support. At the same time, fewer organizations really benefit from this mechanism, as around 25% of the whole 1% money goes to one organization that runs ‘subaccounts’ to support particular children (Ministry of Finances, 2015). In this way, the mechanism that was to support organizations that serve public benefit became a mechanism to support private interests of individuals. The practice has been growing for years yet each consecutive government does not want to ban this practice, being afraid of big protests of parents of children with disabilities, for whom it is the only way to get funding for the expensive rehabilitation of their children.

Individual philanthropy continues to decrease, as many citizens consider the 1 percent mechanism to be a sufficient form of philanthropy. Some nonprofits have recently begun to use crowd funding to fund initiatives. Corporate philanthropy is largely focused on activities that will increase profits in the long-run by improving their image. As philanthropy remains limited, organizations focus more on seeking public grants. Organizations also prefer to rely on public funding rather than engage in risky commercial activities. More and more organizations, however, collect fees for their services (in a form of paid benefit activity to recuperate costs) than 3 years ago (growth from 45% to 55%)¹¹. More nonprofits are aware that they can legally do that and openly collect fees for their services (some of them so far collected fees in the form of pseudo-donations). Some organizations started collecting fees due to shortage of funding. Most organizations collect membership fees, but such fees are small and do not provide significant revenue. For this reason, some organizations do not even bother collecting fees and instead use the time to prepare additional grant proposals for more significant amounts of funding.

The 2015 was a year of a break between the former and coming EU funding period, so many organizations had to look for temporary funding from other sources (while waiting for new EU grant competitions) yet still had to let go many employees, as they did not have funding necessary to keep them. There is a huge financial stratification in the sector, and the largest organizations get most available funding.

But the main source of funding for most organizations having any funding at all are, as mentioned before, money from public sources. Although the research shows that organizations point to more sources of funding they get funding from than it was the case 3 years ago (*Finanse organizacji pozarządowych*, 2015) local governments have been the main source of funding for nonprofit organizations in Poland for years. For years nonprofits have

¹¹ Data received from the KLON/JAWOR Association’s research team.

become more and more dependent on public funding, which for many meant drifting from their original mission.

Most nonprofit organizations' funding from local authorities comes in the form of contracts for public services. The government does not allocate discretionary funding for nonprofits and thus organizations must do what governments tell them to do in the contracts.

Relations between nonprofit organizations and public administration. Growing dependence on public funding and its impact on the loss of identity and drifting from the core mission

The relations between nonprofit organizations and public administration in Poland are determined to a large degree by the process which the author calls the governmentalization of the nonprofit sector.

By the governmentalization of the nonprofit sector the author means the process, in which:

- 1) nonprofit (nongovernmental) organizations are becoming more and more dependent on contracts and projects funded by public institutions,
as a result of which
- 2) they are adopting priorities and methods of operation of public institutions,
through which
- 3) they are becoming in fact quasi-public institutions (*government extensions* or *quangos*),
causing
- 4) functional growth of government (and the weakening of functional importance of the nongovernmental sector)¹².

Nonprofits in Poland are more and more dependent on public funding, as more and more organizations use public funding (in 2014, 55% of organizations profited from local government funding and 18% from central government funding, in comparison with, respectively, 48% and 12% in 2011 (*Finanse organizacji pozarządowych*, 2015). And such growing trends have been in place for years. Public funding has also constituted the growing part of the whole budget of the nonprofit sector (taken together, public funding from local and central government as well as the European Union constituted 30% of the whole nonprofit budget in 2003, 41% in 2005, 52% in 2007, 44% in 2009 and 49% in 2011 (*Podstawowe fakty...*, 2013).

¹² Compare: A. Rymśza, *Zagubiona tożsamość? Analiza porównawcza sektora pozarządowego w Polsce i w Stanach Zjednoczonych*, Ministry of Work and Social Policy, Warsaw 2013.

Why does governmentalization of the nonprofit sector mean drifting from the core missions of organizations? Missions, values, social functions – different from functions of government and business sectors. It is in accordance with government failure theories, according to which the third sector came into being to be an alternative to the government (provide different services, for other target groups).

In the table below one can find exemplary manifestations of governmentalization of the nonprofit sector and its negative consequences

Table 1 Exemplary manifestations of governmentalization of the nonprofit sector and its negative consequences

Manifestations of governmentalization	Consequences
Adjusting to government priorities (regarding the type of beneficiaries, services) through accepting government programs	Abandonment of people excluded from government programs; services incompatible with existing needs
Dependence on public funding	Abandonment of the civil society role of checking government action (watchdog)
Maximalization of the number of programs' beneficiaries and decreasing of costs (quantitative indicators as a decisive factor in competition for public funding)	Quantity > quality Minimal standards of care, support, abandonment of service provision to difficult and demanding beneficiaries (f.ex. people with most severe disabilities)

Source: Author's construction

Thus, through governmentalization nonprofit organizations often abandon helping people excluded from government programs, restrain their criticism towards government authorities and agencies, especially from criticizing the bodies they receive or want to receive funding from and lower the standards of care. They stop serving as an alternative to the government sector. Thus the governmentalization of nonprofit (nongovernmental) organizations threatens the fulfilment of functions traditionally expected from nonprofit (nongovernmental) organizations. Through governmentalization nongovernmental organizations are ceasing to be *non*governmental.

What are the main reasons for growing dependence on public funding? The first reason is that organizations are trying to secure funding for financial stability and growth as philanthropy (corporate and individual), the only– typical for nonprofit – funding, turned out not to be a sufficient and reliable source of money. The second reason comes from the change in the character of support from the government, which is less discretionary and organizations have less say in how the funding they receive can be spent.

Dependence on public funding is not the only dimension of the relations between nonprofit organizations and public administration. There are many organizations that engage in various advocacy and watchdog activities. But those coalitions work mostly on the central level and communicate with the central government, while organizations are mostly dependent on local funding.

Threats and hopes for the nonprofit sector after the presidential and parliamentary elections in 2015

From various international news on the situation in Poland at the end of 2015 and the beginning of the 2016, a person from abroad could get the impression that the Polish democracy has been vanishing. Since strong democracy is highly correlated with a *sine qua non* condition for the strong and vibrant nonprofit sector, one could think that the democratic roles of nonprofit organizations and regular citizens have been also vanishing in Poland.

The situation is much more complex and not as it seems at the first sight.

From the one hand, it is true that the government while passing certain acts at the beginning of its term omitted the consultation phase, during which citizens and organizations can comment on the laws' proposals¹³. It seems to assume that since they won the elections and got the majority of the vote, they are authorized by the society to make the reforms they announced in the campaign.

On the other hand, this is the first Polish government in Polish history that created the Office of the Government Plenipotentiary for Civil Society that aims at strengthening civil society in Poland. The Plenipotentiary was appointed on January 8th, 2016 and has a plan of several changes that are to reform and strengthen the nonprofit sector and civil society in Poland.

Among the changes the Plenipotentiary aims to implement¹⁴ there are:

- Creation of the Council of Social Dialogue, a council that is to be a place of a dialogue between the government and the nonprofit sector. The idea is that the nonprofit sector (its various sub-fields) is truly represented in the Council;
- Amendment of the Act on Public Benefit Organizations and Voluntary Work to make it more open for smaller and weaker organizations;

¹³ In Poland all acts that are passed by the government should go through so-called consultation phase. This is regulated, among others, by such acts as: Act on central administration departments [Ustawa o działach administracji rządowej] from Sept. 4th, 1997, Ustawa o Radzie Ministrów from Aug. 8th, 1996, Act on labor unions [Ustawa o związkach zawodowych] from May 23rd, 1991 and Act on employers' organizations [Ustawa o organizacjach pracodawców] from May 23rd, 1991. The regulations allow the government to omit the consultation phase in 'exceptional situations' without really explaining what are these exceptional situations.

¹⁴ They can be found at the Plenipotentiary website at: <http://www.spoleczenstwoobywatelskie.gov.pl/program-dla-rozwoju-spoleczenstwa-obywatelskiego> [access Feb. 2016].

- The change in support programs for the nonprofit sector run by the central government to prioritize the support for civic education, the watchdog, advocacy organizations and organizations that increase the social participation of citizens;
- Make more time (and in better hours) available for the nonprofit sector in public television and public radio;
- Creation of Polish Solidarity Corps of Volunteering that would encourage volunteering through giving long-term volunteers various benefits including participation in interesting meetings and trainings, free tickets to various cultural places, etc.
- Decrease of bureaucracy of nonprofit organizations, especially those smaller ones
- Introduction of small and large institutional grants for the development of organizations

In March 2016 the Office of Government Plenipotentiary for Civil Society organized a conference during which the Plenipotentiary presented its program for the nonprofit sector's reform and invited the nonprofit organizations to cooperation on its implementation.

These plans for the development of civil society in Poland sound very promising and are commonly accepted by most nonprofit organizations in Poland. The future will show how many of them will become a reality and how many obstacles to the development of the nonprofit sector in Poland will be combated.

Conclusions

The Polish nonprofit sector has been growing for years, yet there are many factors that distract nonprofit organizations from carrying out many of their missions and goals and from playing many of the important functions in a society that are or were expected from them.

Among the most important factors constraining its development one should list:

- Complicated and lengthy registration process
- Complicated reporting requirements and controls
- Unfriendly media coverage
- Short-term funding
- Requirement of own contribution to profit from public funding
- Dependence on public funding and governmentalization

These problems are known to the first in the Polish history and recently appointed Government Plenipotentiary for Civil Society who has a plan of several changes to reform and strengthen the nonprofit sector and civil society in

Poland. The plans for the development of civil society in Poland sound very promising and are commonly accepted by most nonprofit organizations in Poland. The future will show how many of them will become a reality and how many obstacles to the development of the nonprofit sector in Poland will be combated.

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MAZĀS UZŅĒMĒJDARBĪBAS ATBALSTA POLITIKA LATVIJĀ

Small Business Support Policy in Latvia

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Latvija

Abstract. *Economic growth is the important factor for improving competitiveness and to ensure the availability of financial resources at all stages of business development. The authors explore European Union activities to promote the development of small and medium enterprises, the Latvian business environment, the regulatory framework, the accounting regulatory framework for small and medium enterprises. The research study included an assessment of the business environment in the international context for the years 2010 – 2016, national support programmes providing financial resources, their availability and tax policy guidelines for small and medium enterprises. The research study results are summarized in a number of conclusions, and recommendations have been developed. Research methodology is based on the analysis of laws and regulations, statistical data and economic and scientific literature studies.*

Keywords: *development, finance, small, medium, enterprises, taxes.*

Ievads

Introduction

Latvijas ekonomikas pamats ir efektīva, pārdomāta un koncentrēta resursu izmantošana, lai veicinātu uzņēmējdarbības attīstību valstī. Kā atzīmēts Latvijas nacionālā attīstības plānā 2014.-2020. gadam (NAP), nozīmīgākie ir tie uzņēmumi, kas rada produktus un pakalpojumus eksportam. Lai panāktu būtisku tautsaimniecības uzplaukumu, jā rūpējas par uzņēmējdarbībai labvēlīgas vides uzturēšanu, investīciju piesaisti un efektīviem pasākumiem nodarbinātības stimulēšanai, iedzīvotāju kompetenču attīstību un konkurētspēju darba tirgū (Pārresoru koordinācijas centrs, 2012). Arī nodokļu sistēmai jābūt vidējā termiņā prognozējamai un konkurētspējīgai, salīdzinot ar citām ES dalībvalstīm, it īpaši ar mūsu tuvākajām kaimiņu valstīm Igauniju un Lietuvu. Saskaņā ar Centrālās statistikas pārvaldes (CSP) 2013. gada datiem Latvijā bija 93775 ekonomiski aktīvie individuālie komersanti un komercsabiedrības (neskaitot zemnieku, zvejnieku saimniecības un pašnodarbinātās personas, kuras veic saimniecisko darbību), no kuriem 99,6% atbilda mazo un vidējo uzņēmumu

kategorijai (MVU). Latvijā ekonomiski aktīvo MVU sadalījums: mikro uzņēmumi – 86,2%, mazie uzņēmumi – 11,1%, vidējie uzņēmumi – 2,3%, lielle uzņēmumi – 0,4%. Būtisks ekonomisko aktivitāti raksturojošs rādītājs ir ekonomiski aktīvo komersantu, komercsabiedrību un pašnodarbināto personu skaits uz 1000 iedzīvotājiem. Latvijas šis rādītājs ir konstanti audzis pēdējo 10 gadu laikā no 17 – 2001. gadā līdz 78 – 2013. gadā (EM Ziņojums, 2015.). Līdz ar to var teikt, ka maziem un vidējiem uzņēmumiem ir nozīmīga loma iekšzemes kopprodukta radīšanā un darba vietu nodrošināšanā. Raksta mērķis ir analizēt mazās uzņēmējdarbības atbalsta politikas instrumentus un to pieejamību uzņēmējiem un pamatojoties uz pētījuma rezultātiem izstrādāt rekomendācijas ekonomikas politikas īstenošanai mazās uzņēmējdarbības attīstības veicināšanai Latvijā. Pētījumā autores izmanto dažādu statistisko un ekonomiska rakstura informāciju par laika periodu no 2007.- 2016. gadam. Pētījuma metodoloģija pamatojas uz normatīvo aktu analīzi, statistisko datu analīzi un ekonomiskās un zinātniskās literatūras studijām.

Mazās uzņēmējdarbības attīstības veicinošie pasākumi ES līmenī *Activities promoting small business development at European Union level*

Divdesmit pirmajā gadsimtā Eiropas Savienībā (ES) kā viens no galveniem risināmiem jautājumiem ir ekonomiskās attīstības paradigma, kas balstīta uz zināšanām. Kā viena no svarīgākajām ES aktivitātēm mazās uzņēmējdarbības attīstības veicināšanai jāmin jau 2008. gadā pieņemtais „Mazās uzņēmējdarbības akts” (*Small Business Act*). Tā izstrādi un pieņemšanu sekmēja fakts, ka ES gandrīz 99% ir mazie un vidējie uzņēmumi un tie nodarbina 2/3 no visiem strādājošiem uzņēmējdarbības vidē (The European Commission, 2009). Tās mērķis ir uzlabot vispārējo politisko pieeju uzņēmējdarbībai, politikas veidošanā no regulas līdz valsts dienestiem, neatgriezeniski nostiprināt principu “Vispirms domāt par mazākajiem” un veicināt MVU izaugsmi, palīdzot risināt atlikušās problēmas, kas traucē to attīstībai (The Commission of the European Communities, 2008). MVU kategorijā ir iekļauti dažāda lieluma uzņēmumi, tai skaitā arī mikro uzņēmumi, tāpēc Eiropas Komisija ir izstrādājusi kritērijus uzņēmumu kategorijām pēc to lielumiem (1. tab.).

Šos MVU kritērijus ieteicams ņemt vērā arī Eiropas Investīciju bankai un Eiropas Investīciju fondam, lemjot par finansiāla atbalsta piešķiršanu MVU. Simboliskais nosaukums „akts”, kas dots šai iniciatīvai, uzsver politisko gribu atzīt MVU svarīgo lomu ES ekonomikā un pirmo reizi izveidot visaptverošu politikas sistēmu, izmantojot 10 principu kopumu, kas vada politikas koncepciju un īstenošanu ES dalībvalstu līmenī. Šie principi ir būtiski, lai ES līmenī pievienotu vērtību, sniegtu vienādas iespējas MVU un uzlabotu tiesisko un administratīvo vidi visā ES:

1. Radīt vidi, kurā uzņēmēji un ģimenes uzņēmumi var attīstīties un uzņēmējdarbība tiek atalgota;
2. Nodrošināt, lai godīgi uzņēmēji, kas ir bankrotējuši, ātri varētu izmantot otro iespēju;
3. Noteikumus izstrādāt saskaņā ar principu “Vispirms domāt par mazākajiem”;
4. Valsts iestādes padarīt atsaucīgas MVU vajadzībām;
5. Valsts politikas instrumentus pielāgot MVU vajadzībām: atvieglot MVU dalību valsts iepirkuma procedūrās un labāk izmantot valsts atbalsta MVU iespējas;
6. Atvieglot MVU pieeju finansējumam un attīstīt tiesisko un uzņēmējdarbības vidi, kas atbalsta laicīgi veiktus maksājumus komerciālos darījumos;
7. Palīdzēt MVU izmantot iespējas, ko dod vienotais tirgus;
8. Veicināt MVU prasmju uzlabošanu un visa veida inovācijas;
9. Ļaut MVU vides problēmas pārvērst par iespējām;
10. Rosināt un atbalstīt MVU, lai tie izmantotu tirgus izaugsmes priekšrocības (EUR-Lex, 2008).

1.tabula. Mikro, mazo un vidējo uzņēmumu kritēriji ES (The European Commission staff working document, 2009)

Table 1 Criteria for mikro, small and medium enterprises in the EU (The European Commission staff working document, 2009)

Kategorijas nosaukums	Kritēriji		
	Darbinieku skaits (vidēji gadā)	Apgrozījums, EUR	Vai Bilances kopsumma, EUR
Vidējs uzņēmums	< 250	≤ 50 milj.	≤ 43 milj.
Mazs uzņēmums	< 50	≤ 10 milj.	≤ 10 milj.
Mikro uzņēmums	< 10	≤ 2 milj.	≤ 2 milj.

Minētie principi ir paredzēti kā vadlīnijas dalībvalstu valdībām, izstrādājot un veidojot MVU atbalsta koncepciju. Lai raksturotu un akcentētu MVU lomu tautsaimniecības attīstībā, lietderīgi analizēt statistiskos datus par to izplatību uzņēmējdarbības vidē ES.

Pētījuma rezultāti (2.tab.) liecina, ka 99,8% no visiem ES dalībvalstīs reģistrētiem uzņēmumiem ir MVU un to skaitam ir tendence pieaugt no 20,7 milj. 2008.gadā līdz 22,3 milj. 2014. gadā un tai skaitā 92,7% ir mikrouzņēmumi. Arī nodarbinātības dati liecina, ka MVU nodarbina 2/3 no

visiem strādājošiem uzņēmumos un to skaits pa analizētiem gadiem būtiski nemainās.

2. tabula. Uzņēmumu kategorijas un nodarbinātība ES dalībvalstīs 2008.-2014. gads
(avots: Annual Report on European SMEs 2014/2015; EIM Business & Policy Research with financial support of the European Communities)

Table 2 Categories of enterprises and employment in the EU Member States in 2008-2014 (source: Annual Report on European SMEs 2014/2015; EIM Business & Policy Research with financial support of the European Communities)

Kategorijas	Mikro uzņēmumi	Mazie uzņēmumi	Vidējie uzņēmumi	MVU kopā	Lielie uzņēmumi	Uzņēmumi kopā
Uzņēmumi						
2008.g skaits, tūkst.	19 058	1 424	226	20 708	43	20 751
%	91,8	6,9	1,1	99,8	0,2	100
2012.g. skaits, tūkst.	20 718	1 362	224	22 304	44	22 348
%	92,7	6,1	1,0	99,8	0,2	100
2014.g. skaits, tūkst.	20 710	1 373	224	22 307	43	22 350
%	92,7	6,1	1,0	99,8	0,2	100
Nodarbinātība						
2008.g. skaits, tūkst.	39 630	27 652	22 665	89 947	43 414	133 361
%	29,7	20,7	17,0	67,4	32,6	100
2012. g skaits tūkst.	39 199	27 211	22 932	89 342	44 022	133 364
%	29,4	20,4	17,2	67,0	33,0	100
2014.g. skaits, tūkst.	39 274	27 452	23 257	89 983	44 438	134 421
%	29,2	20,4	17,3	66,9	33,1	100

Pozitīvas tendences vērojamas 2014. gadā, kur ES MVU pievienotā vērtība pieauga par 3,3%, nodarbinātība par 1,2% un tie radīja 58% no pievienotās vērtības. Aptuveni trīs ceturtdaļas MVU darbojas piecās galvenajās nozarēs: vairumtirdzniecība un mazumtirdzniecība, ražošana, būvniecība, pakalpojumi, izmitināšanas un ēdināšanas pakalpojumi (Muller P. et al, 2015).

Eiropas mērogā ir veikti nozīmīgi pētījumi par MVU nozīmi tautsaimniecības attīstībā, darba vietu un pievienotās vērtības radīšanā. De Vit un de Kok (2014) pētījums liecina, ka MVU rada vairāk neto darba vietu nekā lielie uzņēmumi. Neto darba vietu pieaugums par 1,8% laika posmā no 2002. - 2008. gadam rāda diezgan lielas atšķirības nozaru griezumā - ieguves rūpniecībā un karjeru izstrādē ir vērojams neto samazinājums par 2,7%, savukārt nekustamā īpašuma un biznesa pakalpojumu nozarē ir vērojams neto darbavietu pieaugums gandrīz par 6%. De Kok (2013) veica analīzi par empīrisko pētījumu rezultātiem

ar mērķi noskaidrot kāda, nozīme darba vietu radīšanas procesā ir MVU. Pētījuma rezultāti ļāva secināt, ka darbavietu radīšanā mikro, mazie un vidējiem uzņēmumiem nozīme ir ievērojama un tie aizņem daudz lielāku daļu kā lieli uzņēmumi. Pie tam, raugoties no ilgtermiņa perspektīvas, MVU ir viens no galvenajiem avotiem inovācijām, kas veicinās ekonomisko izaugsmi. Pētījums parādīja arī, ka mazie un jaunie uzņēmumi attīstās daudz straujāk kā lieli uzņēmumi. Otrs secinājums šajā pētījumā ir, ka, valstīs ar zemiem ienākumiem un valstīs ar augstu ienākumu līmeni, daļa, ko rada MVU neto darba vietas, ir augstāka nekā valstīs ar vidējiem ienākumiem. Tas raksturo kopumā atšķirības uzņēmējdarbības aktivitātēs starp valstīm ar atšķirīgu ienākumu līmeni. Pētījuma autori to skaidro ar grūtībām saņemt finansējumu, normatīvo slogu un vājo infrastruktūru konkrētajās valstīs.

Kā nozīmīgākā ES finanšu atbalsta programma MVU jāmin *COSME* programma ar 2,3 miljardu EUR finansējumu. Tā ir ES uzņēmumu konkurētspējas un MVU programma laikposmam no 2014. līdz 2020. gadam, un paredzēta atbalstīt MVU finansējuma pieejamības uzlabošanu, sniegt atbalstu piekļuvei starptautiskiem tirgiem, labvēlīgas vides izveidei konkurētspējas nodrošināšanai un uzņēmējdarbības kultūras sekmēšanai (Eiropas Komisija, 2015). Eiropas Komisija atbalsta arī izglītību uzņēmējdarbības jomā, līdzfinansē apmaiņas programmas *Erasmus* jaunajiem uzņēmējiem un vada atbalsta tīklus, kur pieejama aktuālā informācija MVU, piemēram, Eiropas biznesa portāls, MVU starptautiskais portāls, portāls finanšu pieejamībai (The European Commission, 2009).

Latvijas uzņēmējdarbības normatīvais regulējums

Business legislative framework in Latvia

Normatīvā regulējumu analīze mazās uzņēmējdarbības uzsākšanai Latvijā, ļauj autorēm secināt, ka pastāv vairākas iespējas - fiziska persona uzsākot savu saimniecisko darbību, var izvēlēties kādu no komercdarbības formām vai reģistrēt savu saimniecisko darbību kā pašnodarbināta persona Valsts ieņēmumu dienestā vai pirkt patentu kādā no nodarbēm. Lai stimulētu iedzīvotājus uzsākt komercdarbību, viens no nozīmīgākiem pasākumiem bija veiktie grozījumi „Komerclikumā” par minimālā pamatkapitāla apjomu un kopš 2010.gada 1.maija personas drīkst dibināt sabiedrības ar ierobežotu atbildību (uzņēmumus) ar minimālo pamatkapitālu 1 EUR apmērā. Šādi mazkapitāla SIA noteikti šādi kritēriji-dibinātāji un dalībnieki ir fiziskās personas (līdz 5), valdes sastāvā ir viens vai vairāki locekļi, un viņi visi ir sabiedrības dalībnieki un katrs sabiedrības dalībnieks var būt tikai vienas mazkapitāla sabiedrības dalībnieks. Šādi mazkapitāla sabiedrībai ir pienākums katru gadu veidot obligāto rezervi,

izdarot atskaitījumus vismaz 25 procentu apmērā no pārskata gada tīrās peļņas līdz tiek sasniegts standarta pamatkapitāls – 2800 EUR.

Būtisku stimulu mazās uzņēmējdarbības veicināšanai deva arī „Konceptija par mikrouzņēmumu atbalsta pasākumiem” ieviešana. Konceptijas mērķis bija radīt nepieciešamos priekšnoteikumus, lai bez darba palikušos iedzīvotājus mudinātu uzsākt komercdarbību, izveidot mikrouzņēmumu darbību veicinošu komercdarbības vidi, samazinot bezdarba līmeni, kā arī attīstīt uzņēmēja spējas, tādējādi palielinot uzņēmēju īpatsvaru kopējo nodarbināto skaitā. Konceptijas rezultātā tapa pilnīgi jauns likums „Mikrouzņēmumu nodokļa likums” un kopš 2010.gada 1. septembra interesenti var pieteikties mikrouzņēmumu nodokļa maksātāja statusa iegūšanai. Minētā likuma redakcijā mikrouzņēmums ir individuālais komersants (IK), individuālais uzņēmums, zemnieka vai zvejnieka saimniecība, kā arī pašnodarbinātā persona, kas reģistrēta Valsts ieņēmumu dienestā kā saimnieciskās darbības veicējs (SDV), vai sabiedrība ar ierobežotu atbildību (SIA), kuri atbilst likumā noteiktiem kritērijiem – apgrozījums līdz 100 000,- EUR, ne vairāk kā 5 darbinieki, maksimālā darba samaksa mēnesī vienam darbiniekam 720,-EUR. Mikrouzņēmumu nodokļa likme ir 9% no apgrozījuma jeb saimnieciskās darbības ieņēmumiem un tas ietver valsts sociālās apdrošināšanas obligātās iemaksas (VSAOI), iedzīvotāju ienākuma nodokli un uzņēmējdarbības riska valsts nodevu par mikrouzņēmuma darbiniekiem, kā arī uzņēmumu ienākuma nodokli.

Jāatzīmē, ka minētie pasākumi – izmaiņas „Komerclikumā” par iespēju dibināt mazkapitāla SIA un veikt saimniecisko darbību izmantojot „Mikrouzņēmumu nodokļa likuma” noteikto regulējumu deva būtisku stimulu jaunu uzņēmumu dibināšanai. Saskaņā ar Uzņēmumu Reģistra datiem, no 2010. gada 1. maija līdz 2014. gada 1. maijam, reģistrētas 62 tūkst. SIA, no tām 66,3% jeb 41,1 tūkst. ir SIA ar samazinātu pamatkapitālu. Pēdējā gada laikā no 2014. gada 1. maija līdz 2015. gada 1. maijam reģistrētas 12 tūkst. no kurām 60,7% jeb 7,2 tūkst. ir SIA ar samazinātu pamatkapitālu. Pēc SIA Lursoft statistikas datiem, apmēram 30% no dibinātājiem ir jaunpienācēji, uzņēmēji, kas nav strādājuši uzņēmējdarbībā kā amatpersonas vai dalībnieki.

Kopumā var secināt, ka 48,3 tūkst. uzņēmumu dibināšanā ir izmantoti Komerclikumā noteiktie atvieglojumi maza uzņēmuma (līdz 5 dalībniekiem) dibināšanai ar minimālo pamatkapitālu 1 EUR apmērā.

Arī jaunā likuma „Mikrouzņēmumu nodokļa likums” ieviešana ir sekmējusi saimnieciskās darbības aktivitāti, par ko liecina 3.tab. apkopotie statistikas dati. Likumā minētās priekšrocības kopumā ir izmantojuši vairāk kā 41 tūkst. nodokļu maksātāju, tai skaitā SIA, individuālie komersanti (IK) un pašnodarbinātās personas (SDV). 2014. gadā mikronodokļa maksātāji ir nodrošinājuši 78,4 tūkst. dabavietas (Ekonomikas Ministrijas Ziņojums, 2015).

3. tabula. Aktīvo mikronodokļa maksātāju skaits sadalījumā pa uzņēmējdarbības formām Latvijā 2011.-2015.g. (avots: LR Labklājības ministrijas ziņojums, 2014; LR Ekonomikas ministrijas ziņojums, 2015)

Table 3 The number of active micro-tax payers by business form in Latvia in 2011-2015 (source: LR Labklājības ministrijas ziņojums, 2014; LR Ekonomikas ministrijas ziņojums, 2015)

Uzņēmējdarbības forma	2011.g	2012.g.	2013.g.	2014.g.	2015.g.
IK	518	1 015	1 284	1 491	x
SDV	2 071	4 665	6 562	8 561	x
SIA	4 423	11 900	17 080	21 696	x
Kopā	7 012	17 580	24 926	31 748	41 343

Līdz ar pozitīvām tendencēm normatīvā regulējumā, kas veicina mazās uzņēmējdarbības attīstību, praksē vērojamas problēmas, kas saistītas ar nodokļu optimizāciju un sociālo nodrošinātību mikronodokļa maksātājiem. To novēršanai tika veikti vairāki grozījumi „Mikrouzņēmumu nodokļa likumā”. Kā būtiskākie no tiem minami – nodokļa likmes palielinājums un nozaru sarksts, kurās nevarēs izmantot mikronodokļa maksātāja statusu. Sākot ar 2016.gada 1.janvāri nodokļa likme apgrozījumam virs 7000 EUR ir: 2016. taksācijas gadā - 13 procenti; 2017. taksācijas gadā un turpmākajos taksācijas gados - 15 procenti. LR Ministru kabinets nosaka nozares, kurās, veicot saimniecisko darbību, mikrouzņēmums nav tiesīgs kļūt un būt par mikrouzņēmumu nodokļa maksātāju, jo nodokļa režīma piemērošana attiecīgajās nozarēs neatbilst šā likuma mērķim. Minētie likuma grozījumi izsauca neapmierinātību no valdības sociālajiem partneriem – Latvijas tirdzniecības un rūpniecības kameras (LTRK) un nozaru asociācijām un diskusiju rezultātā tika panākts kompromiss –minētās normas tika atceltas ar 2016. gada 1. janvāri un tika paredzēts uzsākt pilnīgi jauna likuma izstrāde mazās uzņēmējdarbības uzsākšanai.

Analizējot Finanšu ministrijas speciālistu, sociālo partneru un dažādu uzņēmēju diskusijas masu medijos un dažādos forumos par sociālo garantiju nodrošinātību mikronodokļa maksātājiem, autores veica aprēķinus (4.tab.) kas ļāva nonākt pie vairākiem secinājumiem. Mikronodokļa maksātāja viena darbinieka VSAOI ir atkarīga no neto apgrozījuma un nodarbināto darbinieku skaita mēnesī, savukārt vispārējā nodokļa režīma maksātāja darbinieka VSAOI ir atkarīga no bruto algas lieluma. Sociālās garantijas mikronodokļa maksātāja režīmā strādājošiem līdzvērtīgas vispārējā režīma nodokļa maksātājiem ir gadījumos, kad neto apgrozījums ir 8330, EUR un ja mikrouzņēmumā strādā ne vairāk kā 1 darbinieks ar bruto samaksu 720, EUR, vai 2 darbinieki ar bruto samaksu 500-600 EUR. Ja mikrouzņēmumā strādā trīs darbinieki ar bruto samaksu 500,-EUR, tad katram darbiniekam no sociālo iemaksu aspekta ir

zaudējumi 8,- EUR mēnesī. Kopumā analizējot (4.tab.) aprēķinus, var secināt, ka no sociālo garantiju viedokļa mikronodokļa režīmā strādāt ir izdevīgi ne vairāk kā diviem darbiniekiem.

4. tabula. **VSAOI vienam darbiniekam dažādos nodokļa režīmos Latvijā (autoru veiktie aprēķini)**
Table 4 Social contributions per employee in different tax systems in Latvia (authors' calculation)

Apgrozījums mēnesī, EUR	Bruto alga mēnesī, EUR	Mikronodokļa maksātāja VSAOI			Vispārējā režīma VSAOI par katru darbinieku (34,09%)
		1 darbinieks	2 darbinieki	3 darbinieki	
8330	720	487,31	243,65	162,40	245,45
	600	487,31	243,65	162,40	204,54
	500	487,31	243,65	162,40	170,45
7000	720	409,50	204,75	136,50	245,45
	600	409,50	204,75	136,50	204,54
	500	409,50	204,75	136,50	170,45
5000	720	292,50	146,25	97,50	245,45
	600	292,50	146,25	97,50	204,54
	500	292,50	146,25	97,50	170,45

Izpētot normatīvo aktu prasības par grāmatvedības reglamentāciju, autore nonāca pie secinājuma, ka grāmatvedības organizācijā uz mikrouzņēmumiem attiecas visas tās pašas prasības, kas minētas normatīvajos aktos juridiskām un fiziskām personām, kas veic saimniecisko darbību. Samazinātas prasības ir Gada pārskata sagatavošanā mikrouzņēmumiem, ja tās nepārsniedz vismaz divus no likumā minētiem kritērijiem: bilances kopsumma 50 000,- EUR, neto apgrozījums 100 000,- EUR, vidējais darbinieku skaits 5. Šādiem mikrouzņēmumiem jā sagatavo tikai Balance un Peļņas vai zaudējumu aprēķins (Gada pārskatu un konsolidēto gada pārskatu likums, 2015). Tie nesagatavo arī Uzņēmuma ienākuma nodokļa deklarāciju, bet individuālie komersanti un pašnodarbinātās personas var nesagatavot Gada ienākumu deklarāciju, jo šo dokumentu vietā ir Mikrouzņēmumu nodokļa deklarācija, kura jā sagatavo un jā iesniedz Valsts ieņēmumu dienestā reizi ceturksnī.

Lai novērtētu Latvijas uzņēmējdarbības vidi starptautiskā kontekstā, raksta autore pētīja uzņēmējdarbības vides reformu rezultātus. Atzīts instruments šādi novērtēšanai ir ikgadējs Pasaules Bankas (PB) pētījums „Doing Business” (DB), kur tiek apsektas 189 pasaules valstis. Pamatojoties uz PB izstrādāto metodoloģiju ar indeksa palīdzību tiek mērītas uzņēmējdarbību regulējošās administratīvās procedūras un to piemērošana dažādās pasaules valstīs un kopš 2010. gada šajā reitingā ir iekļauta arī Latvija.

5. tabula. Latvijas vieta Pasaules Bankas pētījumā *Doing Business 2010.-2016*
(World Bank group, 2015)

Table 5 Latvia's rank in the World Bank study *Doing Business 2010-2016*
(World Bank group, 2015)

Rādītāji	2010	2011	2012	2013	2014	2015	2016
Uzņēmējdarbības uzsākšana	51	53	51	59	57	36	27
Būvniecības atļaujas	77	79	112	113	79	24	30
Kredītu reģistrs	6	6	4	4	3	19	17
Īpašuma reģistrācija	61	57	32	31	33	30	23
Investoru tiesību aizsardzība	57	59	65	70	68	46	49
Nodokļu maksāšana	56	59	67	52	49	24	27
Pārrobežu tirdzniecība	16	16	15	16	17	22	22
Līgumu izpilde	14	14	17	24	21	35	25
Uzņēmējdarbības izbeigšana	89	80	32	33	43	39	43
Vieta kopumā	27	24	21	25	24	22	22

Izstrādājot Latvijas Stratēģiskās attīstības plānu 2010.- 2013. gadam, tika izvirzīts mērķis sasniegt DB 19. vietu un lai to panāktu bija paredzēts strādāt pie tautsaimniecības attīstības ilgtermiņā, īpašu uzmanību pievēršot tām jomām, kur Latvijas reitings ir zemāks par 50. vietu. Analizējot Latvijas uzņēmējdarbības vides attīstības tendences starptautiskajā kontekstā pēc DB indeksiem (5.tab.), var secināt, ka ir sasniegts ievērojams progress. Pēdējo divu gadu reitings uzrāda, ka Latvijai nevienā jomā nav zemāka vērtējuma par 50. Rezultāts sasniegts pateicoties vairākām veiktām reformām – samazinātas dibināšanas izmaksas mazkapitāla SIA, ieviesta uzņēmumu elektroniskā reģistrācija, atvieglotas pamatprasības uzņēmumu dibināšanā. Vislielākās problēmas 2012.-2014. gadā bija vērojamas būvniecības jomā. Jaunā „Būvniecības” likuma pieņemšana, kā arī pakāpeniskā Būvniecības informācijas sistēmas ieviešana būtiski ir uzlabojusi uzņēmējdarbības vidi arī šajā jomā, ļaujot Latvijai ieņemt 24.-30. vietu uz pārējo valstu fona. Būtiski uzlabojumi vērojami arī investoru tiesību aizsardzības jomā un nodokļu jomā. Lai turpinātu iesāktās reforma uzņēmējdarbības vides sakārtošanā, ir veikti grozījumi MK noteikumos „Uzņēmējdarbības vides uzlabošanas pasākumu plāns 2014.-2015. gadam”, kas paredz ieviest “klusēšanas-piekrišanas” principu 17 valsts pārvaldes iestāžu pakalpojumiem, piemēram, tiesu ekspertu sertifikācijā un resertifikācijā, sugu un biotopu aizsardzības jomas eksperta sertifikāta izsniegšanā, veterinārmedicīniskā pakalpojuma sniedzēja reģistrācijā. Līdz ar „klusēšanas-piekrišanas” principa integrēšanu atļauju, sertifikātu saņēmējiem tiks mazināti nepieciešamie resursi (laiks, izmaksas) administratīvo formalitāšu kārtošanā ar valsts pārvaldes iestādēm (Ekonomikas Ministrijas Ziņojums, 2015). Tomēr sasniegt DB reitingā 19. vietu Latvijai vēl nav izdevies. Salīdzinot Latvijas vietu DB reitingā ar mūsu tuvākajām kaimiņvalstīm, kur Igaunija pēdējos divos gados

ieņem 16. vietu un Lietuva 21. un 20. vietu (World Bank group, 2015), var secināt, ka mūsu valsts pārvaldei daudz aktīvāk jāveic reformas uzņēmējdarbības vides uzlabošanā, lai mūsu uzņēmēji būtu līdzvērtīgi konkurenti igauņu un lietuviešu uzņēmējiem.

Valsts atbalsta programmas finanšu resursu pieejamībai *National support programmes for the availability of financial resources*

Latvijā vadošā valsts pārvaldes iestāde ekonomiskās politikas jomā ir Ekonomikas ministrija. Aktivitātes, kas saistītas ar Eiropas Reģionālā attīstības fonda, Eiropas Sociālā fonda un Kohēzijas fonda projektiem, administrē Ekonomikas Ministrijas pakļautībā Latvijas investīciju un attīstības aģentūra (LIAA). Tās uzdevums ir nodrošināt ES fondu līdzfinansēto valsts atbalsta programmu ieviešanu, sniedz informāciju par esošajām un plānotajām aktivitātēm, nodrošina projektu iesniegumu pieņemšanu, izvērtēšanu, līgumu slēgšanu, maksājumu veikšanu un projektu uzraudzību. Izpētot LIAA sniegto informāciju par pieejamām atbalsta programmām uzņēmējiem, var secināt, ka to klāst ir plašs - Atbalsts biznesa uzsākšanai un attīstīšanai, Atbalsts sadarbības veidošanai, Aizdevumi un garantijas, Riska kapitāla fondi.

Atskatoties uz 2007.-2013.gada plānošanas periodu, autores atzinīgi novērtē īstenoto programmu „Pasākumi motivācijas celšanai inovācijām un uzņēmējdarbības uzsākšanai”, jo bez zināšanām un pozitīviem stimuliem nav iespējams pievērst jaunus cilvēkus nodarboties ar uzņēmējdarbību. Motivācijas programmā organizētie atbalsta pasākumi ir sadalīti vairākās tematiskās grupās: praktiskie apmācību pasākumi vidējās un augstākās izglītības iestāžu izglītojamiem, pedagogiem un jaunatnes darbiniekiem par inovatīvas uzņēmējdarbības uzsākšanu; tehnoloģiskās intereses un jaunrades veicināšanas pasākumi; apmācību semināri inovatīvo ideju autoriem; atbalsta pasākumu nodrošināšana uzņēmējdarbības uzsācējiem un esošiem uzņēmumiem (LIAA, 2014).

Tāpat atzinīgi autores novērtē Mentoringa programmas īstenošanu, kas paredzēta uzņēmējiem un uzņēmējdarbības uzsācējiem. Pieredzējušie uzņēmēji programmas ietvaros kļūs par jauno uzņēmēju mentoriem, tādējādi nodrošinot, ka abas puses iegūst ko jaunu: mentoriem ir iespēja dalīties savā pieredzē, savukārt pieredzes pārņēmējiem ir iespēja gūt zināšanas un prasmes, kā augt pašiem un attīstīt savu uzņēmumu. Labus rezultātus uzrāda arī Biznesa inkubatoru programma. Latvijas reģionos un Rīgā darbojas 9 biznesa inkubatori un to darbības rezultātā kopumā no 2009.gada līdz 2014. gada beigām ir sniegts atbalsts 1300 uzņēmumiem un izveidotas (saglabātas) vidēji 2000 darba vietas gadā. Biznesa inkubatoru sniegto atbalsta pakalpojumu nodrošināšanai projekta ietvaros šajā periodā izlietoti 19 milj. EUR. Kopumā šajā periodā iesaistīto

komersantu nomaksāto nodokļu apmērs sastāda 19,3 milj. EUR. Kopējais projekta ietvaros pieejamais finansējums ir 28,75 milj. EUR tai skaitā 24,44milj. EUR ERAF finansējums (LIAA, 2014). Biznesa inkubatoru darbības rezultējošie rādītāji apliecina šīs programmas lietderību uzņēmējdarbības veicināšanai un attīstībai.

Kopumā Latvija 2007.-2013. plānošanas periodā ir saņēmusi EUR 4,53 mljrd. kohēzijas politikas mērķu īstenošanai ar ES fondu starpniecību, kur 71% no finansējuma (jeb 3.2miljardi) atvēlēti darbības programmai „Infrastruktūra un pakalpojumi”, 16% (jeb 737 milj.) programmai „Uzņēmējdarbība un inovācijas” un 13% (jeb 583 milj.) programmai „Cilvēkresursi un nodarbinātība” (ES fondi, 2015).

Kā liecina Ekonomikas ministrijas sniegtā informācija, Latvijai no 2014. – 2020.gadam Eiropas Savienības fondu aktivitāšu uzņēmējdarbības un energoefektivitātes veicināšanai ietvaros Mazo un vidējo komersantu konkurētspējas veicināšanai kopējais pieejamais finansējums ir 237,1 milj eiro.

6. tabula. **MVU konkurētspējas veicināšanas programmas un to finansējums Latvijā (LR Ekonomikas ministrija, 2015)**
Table 6 Competitiveness promotion programmes and funds for SMEs in Latvia (LR Ekonomikas ministrija, 2015)

Projekts	Finansējuma saņēmējs/ Gala labuma guvēji	Finansējums, EUR (atbalsts)	Plānotā atlase
Atbalsts ražošanas telpu un infrastruktūras izveidei vai rekonstrukcijai	Komersanti/ Sīkie (mikro), mazie, vidējie komersanti apstrādes rūpniecības nozarē	24 855 142 (grants 35- 45% no projekta summas)	2016.gada 2.cet.
Reģionālie biznesa inkubatori un radošo industriju inkubators	LIAA/ fiziskas personas (ideju autori), kuri veic vai gatavojas veikt saimniecisko darbību), sīkie (mikro), mazie un vidējie komersanti	32.8 milj. (grants 50% no projekta summas)	2016.gada 1.cet.
Starptautiskās konkurētspējas veicināšana	LIAA/ Uzņēmēji un biedrības, nodibinājumi, kuri atbilst MVU statusam, ostu pārvaldes, pašvaldības un plānošanas reģioni projektos, kas neietver saimnieciskas darbības.	60 944 (grants 80-100% no projekta summas)	2016.gada marts
Klasteru programma	Biedrība, kas atbilst Ministru kabineta noteikumos izvirzītajām prasībām/ Sīkie (mikro), mazie, vidējie un lielie komersanti	6 200 001 (grants 85% no projekta summas)	2016.gada 2.cet.
Sēklas un sākuma kapitāla fondi, izaugsmes kapitāla fondi	Riska kapitāla fondi/ Sīkie (mikro), mazie, vidējie komersanti un lauksaimniecības pakalpojumu kooperatīvās sabiedrības	30 000 000 (aizdevums līdz 15 % apmērā no fonda kapitāla)	2017.gada 1. cet.

Projekts	Finansējuma saņēmējs/ Gala labuma guvēji	Finansējums, EUR (atbalsts)	Plānotā atlase
Mezanīna aizdevums, Mikrokreditēšana un aizdevumi biznesa uzsācējiem	ALTUM/Sīkie (mikro), mazie, vidējie un lielie komersanti un lauksaimniecības pakalpojumu kooperatīvās sabiedrības	30 000 000 aizdevums 35-45% no projekta izmaksām (maksimālā summa vienam komersantam ir 25 000 – 150 000)	2016.gada jūlijs-2020.

Patreiz uzņēmējiem ir pieejama informācija par projektiem, kuru īstenošanu paredzēts uzsākt 2016. gadā (6. tab). Finansējums uzņēmumiem būs pieejams konkursa kārtībā iesniedzot sagatavotos projektus izvērtēšanai atbilstoši noteiktiem kritērijiem. Finansējums būs pieejams ar finanšu institūcijas ALTUM starpniecību, riska kapitāla fondu vai LIAA starpniecību. Viena no programmām - Klastera programmas finansēšana notiek ar biedrību starpniecību. Šīs programmas ietvaros projekta iesniedzējs veido klasteri, kas kopējā sadarbības tīklā apvieno komersantus, pētniecības organizācijas, zinātniskās institūcijas, izglītības iestādes un citas institūcijas un darbojas savstarpēji saistītās nozarēs, tautsaimniecības nišā, produkta vai pakalpojuma grupā vai vērtības ķēdē, vai reģionā.

Izpētot MVU konkurētspējas veicināšanai paredzētos pasākumus (tab.6.), var secināt, ka ir paredzēti vairāki finansējuma veidi – granti, dažāda veida aizdevumi un kapitāla fondi. Lai piedalītos projektā uzņēmējam pašam nepieciešams nodrošināt līdzfinansējumu, jo ES fonda finansējums atkarībā no konkrētā projekta ir 15%-80% apmērā. Lielāks finansiālais atbalsts pieejams ir projektiem ar granta finansējumu.

Secinājumi *Conclusions*

Veiktā pētījuma rezultātā autore saskata pozitīvas gan negatīvas iezīmes mazās uzņēmējdarbības uzsākšanai un attīstībai. Būtisku stimulu uzņēmējdarbības uzsākšanai deva “Mazās uzņēmējdarbības akts” kas ietver saistošas vadlīnijas ES dalībvalstīm. ES mikrouzņēmumos nodarbināti vidēji 29, 2 % no visiem strādājošiem, MVU rada vairāk neto darba vietu nekā lielie uzņēmumi un mazie un jaunie uzņēmumi attīstās daudz straujāk kā lielie uzņēmumi. ES līmenī MVU laikposmam no 2014. līdz 2020. gadam finansējuma pieejamībai ir paredzēta apjomīga programma *COSME* ar 2,3 miljardu EUR finansējumu. Plašu atbalstu jauno uzņēmēju izglītošanai sniedz Eiropas Komisija apmaiņas programmas *Erasmus* ietvaros, kā arī tā atbalsta tīklus, kur pieejama aktuālā informācija MVU.

Atzinīgi jāvērtē veiktās izmaiņas Komerclikumā, kas ļauj dibināt jaunas SIA ar minimālo pamatkapitālu 1,- EUR apmērā. Pirmos četrus gadus „Komerclikumā” noteiktos atvieglojumus maza uzņēmuma dibināšanai ir izmantojuši 66,3% no visiem jaundibinātiem uzņēmumiem, pēdējā gada laikā to īpatsvars nedaudz sarucis līdz 60,7%, tomēr tas tāpat liecina par uzņēmēju augsto aktivitāti, jo 30% no dibinātajiem ir jaunpienācēji, kas nav strādājuši uzņēmējdarbībā kā amatpersonas vai dalībnieki.

Pozitīvu stimulu mazās uzņēmējdarbības attīstībai ir devusi arī jauna likuma „Mikrouzņēmumu nodokļa likums” ieviešana 2010. gadā. Likumā minētās priekšrocības kopumā ir izmantojuši vairāk kā 41 tūkst. nodokļu maksātāju, tai skaitā SIA, individuālie komersanti un pašnodarbinātās personas. Tomēr praksē ir parādījušās arī vairākas problēmas. Izvēloties mikronodokļa maksāšanas režīmu, uzņēmējiem uzmanība jāpievērš sociālam aspektam. Autoru veiktie aprēķini parāda, ka no sociālo garantiju viedokļa mikronodokļa režīmā strādāt uzņēmumā ir izdevīgi ne vairāk kā diviem darbiniekiem. Kritiku pelna arī nekonsekventie grozījumi „Mikrouzņēmumu nodokļa likumā”, kas paredzēja nodokļa likmes palielinājumu un nozaru sarkstu, kurās nevarēs izmantot mikronodokļa maksātāja statusu. Lai gan minētie grozījumi ir atcelti, un ir uzsākts darbs pie jauna mikrouzņēmēju regulējuma izstrādes, šāda situācija traucē maziem uzņēmējiem plānot savu saimniecisko darbību mērķtiecīgai attīstībai.

Analizējot Latvijas uzņēmējdarbības vides attīstības tendences starptautiskajā kontekstā pēc DB indeksiem var secināt, ka ir sasniegts ievērojams progress. Pēdējo divu gadu reitings uzrāda, ka Latvijai nevienā jomā nav zemāka vērtējuma par 50. Tomēr, salīdzinot Latvijas vietu DB reitingā ar mūsu tuvākām kaimiņvalstīm, Igauniju un Lietuvu, jāsap, ka mūsu valsts pārvaldei daudz aktīvāk jāveic reformas uzņēmējdarbības vides uzlabošanā, lai mūsu uzņēmēji būtu līdzvērtīgi konkurenti igauņu un lietuviešu uzņēmējiem. Galvenā vērība būtu jāpievērš investoru tiesību aizsardzības pasākumiem, uzņēmējdarbības izbeigšanas normatīvā regulējuma pilnveidošanai un būvniecības jomas sakārtošanā.

Latvijas pievienošanās ES ir devusi iespēju saņemt finansējumu uzņēmējdarbības attīstībai. Par to liecina Eiropas dažādu fondu īstenotie projekti par EUR 4,53 mljrd. 2007.-2013. plānošanas periodā. Šajā plānošanas periodā ir īstenotas vairākas labas programmas, kas motivē, palīdz un atbalsta uzsākt mazo uzņēmējdarbību. Te jāmin „Pasākumi motivācijas celšanai inovācijām un uzņēmējdarbības uzsākšanai”, „Mentoringa programma” un „Biznesa inkubatoru programma”. Arī nākošajā plānošanas periodā 2014.-2020. gadam MVU konkurētspējas veicināšanai ir paredzētas vairākas programmas par kopējo finansējumu 237,1 milj. EUR. Finansējums būs pieejams vairākos veidos – granti, dažāda veida aizdevumi un kapitāla fondi.

Kopumā lai veicinātu uzņēmējdarbības attīstību, Latvijas institūcijām jāturpina strādāt pie uzņēmējdarbības vides uzlabošanas pasākumiem, kā arī jāveic konkrēti pasākumi mikrouzņēmumu nodokļu politikas pilnveidošanai.

Summary

The question to improve competitiveness and to ensure the availability of financial resources at all stages of business development have been important at all times. The aim of the paper is to analyze the small business support policy tools and their availability for entrepreneurs and, based on the results of the research study, to develop recommendations for economic policy implementers to promote the development of small business in Latvia. The first part of research study explores the activities promoting small business development at European Union level, including the Small Business Act, an analysis of statistical data of enterprises and employment in the EU Member States for 2008-2014, the European Commission's activities in the business promotion field. A separate chapter devoted to study the business legislative framework and the accounting regulatory framework for SMEs in Latvia. The author's calculations of social contributions in different tax systems in Latvia have been done. The research study included an assessment of the business environment in the international context for 2010 - 2015. The final part of the paper deals with the national support programmes providing financial resources and their availability in Latvia. The research results are summarized in a number of conclusions, and recommendations have been developed. The research results show that the implementation of the national policy to support small business development involves a lack of consistency that hinders small businesses to plan their economic activities in the development of targeted. Research methodology is based on the analysis of laws and regulations, statistical data and the economic and scientific literature studies.

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VALSTS SEKTORA DARBĪBAS EFEKTIVITĀTES IZVĒRTĒŠANAS IESPĒJAS

Evaluation of Efficiency in the Public Sector

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Abstract. *The paper is focused on the efficiency of government activities and possibilities of evaluating it. Nowadays an appropriate use of public finances is an urgent problem of financial management of the state. Therefore, a special emphasis is put on the necessity to evaluate the results of activities of the public sector. These results have become an important element of the public financial system oriented towards results, as they form a stable base for planning and evaluating government budget resources. Being unaware of results, it is impossible to estimate if the aims and tasks set by the government financial policy are real and appropriate to the current situation and financial resources. Therefore a systematic approach to the evaluation of activities of the state administration is necessary. It can be done with the help of the system of efficiency indicators.*

Existing views on efficiency evaluation options for the public sector in economic literature are summarized, related issues are highlighted and trends in the improvement of the performance indicators system are identified in the research.

Keywords: *efficiency, effectiveness, input, outcome, output, productivity, public sector.*

Ievads

Introduction

Ekonomistu pētījumos par fiskālo politiku tiek uzsvērta nepieciešamība izvērtēt fiskālās vadības mehānismu attiecībā uz valsts budžeta izdevumu daļas veidošanos un nodrošināšanu, aktualizējot valsts sektora rīcībā esošo resursu efektīvu izmantošanu. Izvērtējot Eiropas valstu budžetu veidošanā izmantoto makroekonomisko prognožu formēšanas un budžeta plānošanas pamatprincipus, var secināt, ka laika posmā līdz 2008.gadam lēmumi par budžeta līdzekļu piešķiršanu valdību noteiktajām prioritātēm tika pieņemti, pamatojoties uz pastāvīgi notiekošā valsts budžetu pieauguma rēķina bez izdevumu lietderīguma izvērtēšanas. Līdz ar to fiskālās situācijas kontekstā apstiprinās apgalvojums, ka tradicionāli ekonomikas stabilitātes apstākļos diskusijas par valsts pārvaldes darbības efektivitāti tiek pieklusinātas. Radikālu nozīmi tās iegūst ekonomiski kritiskajās situācijās, kad valdībai, samazinoties budžeta ieņēmumiem,

palielinoties budžeta deficīta apjomiem, valdības parādam, jāsāk risināt valdības izdevumu efektivitātes problēmas. It sevišķi tās ir kļuvušas aktuālas fiskālās konsolidācijas situācijā, kad valdībām ir jāpieņem lēmumi par korekcijām budžetos, kuru viens no risinājumiem ir izdevumu samazināšana.

Tātad, būtiska uzmanība ir jāpievērš tādiem valsts finanšu organizatoriskajiem jautājumiem kā valsts izdevumu struktūras izvērtēšana un to vadības sistēmu pārskatīšana, kuras iepriekšējos gados ietekmēja valdības funkciju un līdz ar to valsts budžetu pieaugumus. Tas viss pastiprina valsts pārvaldes strukturālo pārmaiņu nepieciešamību, kuras nav iespējamās bez reformām budžeta procesa jomā.

Pētījuma autores uzskata, ka reālas strukturālās pārmaiņas valsts pārvaldē nozīmē ne tikai tās struktūras maiņu, bet, būtiska ir sistēmiska pieeja, kurā ir ietvertas atbildes uz jautājumiem: kas valdībai jā dara? kā to var izdarīt? kādi ir efektīvākie darbības risinājumi? Tas viss nosaka nepieciešamību pilnveidot valsts budžeta plānošanas procedūras, kas savukārt aktualizē prasību veidot pilnīgu informāciju par fiskāliem lēmumiem un to rezultātiem. Līdz ar to nozīmīgs kļūst tāds problēmjautājums kā valsts sektora darbības efektivitātes izvērtēšana.

Pētījuma mērķis ir, apkopojot ekonomiskajā literatūrā pastāvošos ar valsts pārvaldes darbības efektivitātes izvērtēšanu saistītos konceptuālos un metodoloģiskos pētījumus un viedokļus, identificēt problēmjautājumus.

Mērķa sasniegšanai izvirzīti šādi uzdevumi:

- izpētīt un apkopot ekonomiskajā literatūrā pastāvošos viedokļus un atzinumus par valsts sektora darbības izvērtēšanas iespējām;
- izvērtēt valsts sektora darbības efektivitātes jēdzienu;
- identificēt būtiskākos problēmjautājumus valsts darbības efektivitātes izvērtēšanas kontekstā.

Jāuzsver, ka identificēto problēmjautājumu risinājumu potenciālo iespēju izpētei un pamatojumam ir nepieciešams veikt atsevišķu un patstāvīgu pētījumu.

Pētījumā izmantotas vispārpieņemtās ekonomiskās analīzes metodes:

- monogrāfiskā jeb aprakstošā, kuras ietvaros, pamatojoties uz Latvijas un ārvalstu speciālās literatūras, zinātnisko publikāciju studēšanu, apkopojot informāciju, tika veikta pētāmā priekšmeta detalizēta izpēte, raksturojot ne vien pētāmā priekšmeta pašreizējo stāvokli, bet arī to, kādas pārmaiņas notikušas laika gaitā;
- analīzes metode, sadalot veselo informāciju sastāvdaļās un apskatot katru no tām atsevišķi;
- loģiski konstruktīvā metode, analizējot rezultātus un izsakot spriedumus;

- kontentanalīze ar mērķi noteikt konkrētus konceptus tekstos, analizējot to nozīmi un savstarpējo attiecību ar citiem konceptiem vai vārdiem.

Valsts sektora darbības izvērtēšanas būtiskākie aspekti *The most important aspects of public sector performance evaluation*

Kopš pastāv valsts institūcija kā tāda, būtiska uzmanība tiek pievērsta valsts pārvaldes darba kvalitātes novērtējumam. Līdz ar to ir aktualizējies valsts pārvaldes darbības efektivitātes jēdziens.

Ekonomiskajā literatūrā valsts pārvaldes darbības efektivitātes izvērtēšanas jautājumi ir iekļauti pētījumos gan makroekonomiskajā kontekstā (J.E. Stiglitz), gan valsts pārvaldes organizācijas kontekstā (A.Premchand, M.Holzer, D.M.Fick, A.Afonso, V.Tanzi u.c.), gan arī publisko finanšu kontekstā (Dž.Miller, B.H.Potter, J.Diamond u.c.). Līdz ar to var apgalvot, ka ekonomiskajos pētījumos valsts darbības efektivitātes jēdziens tiek vērtēts no dažādiem aspektiem, kas rada zināmu problemātiku vienotas izpētes metodoloģijas izveidē.

Praktiski būtiska uzmanība valsts pārvaldes darbības efektivitātes izvērtēšanas jautājumiem tika pievērsta ASV 20.gs. 70.-80.gados, Eiropā 21.gs. sākumā, kad valstīs, palielinoties valdību budžeta deficītam, pastiprinājās sabiedrības neapmierinātība ar pieaugošiem izdevumiem.

Izteikta uzmanība valsts sektora darbībai tika pievērsta situācijā, kad 2007.g. ASV sākusies, kopš 2008.g. pārņemot arī Eiropas valstis, ekonomiskā krīze negatīvi ietekmēja valdību finanšu kapacitāti: samazinājās nodokļu ieņēmumi budžetos, pieauga budžetu deficīti, kas kritiski palielināja valdību kopējos parādus.

Līdz ar to aktualizējās jaunas publiskās vadības (New Public Management) principu ieviešanas nepieciešamība valsts sektora darbībā. Jāuzsver, ka tā nav jauna parādība, jo ilgā laika posmā valstīs tiek aktualizēti pasākumi publiskās pārvaldes darbības izvērtēšanai. Pētnieki uzskata, ka tā ir zināma renesanse valdības sektora izmaksu izvērtēšanā, kad lielāka uzmanība jāpievērš nevis ieguldījumiem, bet, izlaidei (output) (Levy, 2010)

Nenoliedzot iepriekšteikto, autores piekrīt viedoklim, ka jaunajā publiskajā vadībā galvenajai uzmanībai jābūt vērstai uz valsts pārvaldes sistēmas uzlabošanu, to organizatoriski pārstrukturējot (managerialism of Public Sector) (Fatemi, Behmanesh, 2012)

Vērā ņemams arī viedoklis, ka jaunās publiskās vadības principu ieviešanas kontekstā valsts sektora sfērā lietderīgi būtu izmantot privātuzņēmēju pieeju (Guerrero – Orozco, 2014)

Līdz ar to, lai novērtētu valsts pārvaldes iestāžu darbu ar mērķi padarīt to pēc iespējas efektīvāku, plaši tiek izmantota uz sniegumu vadību balstītā teorija. Balstoties uz tās atziņām, iespējams novērtēt valsts pārvaldes sniegumu jeb tās darbībā tieši sasniegtos rezultātus. Tātad tiek nodrošināta uz sniegumu orientēta vadība, kurai ir gan stratēģiska, gan arī integrēta pieeja (Baltiņa, 2010)

Veicot pastāvošo viedokļu izpēti par valsts pārvaldes darbības izvērtēšanas iespējām, pirmkārt, var secināt, ka valsts sektora darbības izvērtēšana ir pozicionējusies kā pētījumu objekts dažādos zinātnes virzienos (ekonomika, vadība, politika u.c.). Līdz ar to tiek izvirzītas daudzpusīgas pieejas valsts pārvaldes darbības vērtēšanas sistēmas izveidei.

Otrkārt, jāuzsver, ka pētījumi šajā jomā ir diezgan haotiski, savstarpēji nesaistīti. Joprojām ekonomisti nav izveidojuši vienotu metodiku, kas dotu iespēju izprast sakarības starp valsts pārvaldes iestāžu izmaksām un iestāžu nodrošināto pakalpojumu rezultātiem. Kā būtiskākais arguments tiek minēts, ka valsts sektora darbības efektivitātes paaugstināšanas problemātiku pēta dažādu zinātnes nozaru pārstāvji, un tiek izmantota arī atšķirīga terminoloģija.

Tomēr autores vēlas uzsvērt viedokli, ka cilvēku darbības efektivitātes izvērtēšana ir būtisks nosacījums valdības lēmumu pieņemšanai. Ja efektivitātes rādītāju sistēma nepastāv, lēmumu pieņemšana tradicionāli notiek, pamatojoties uz subjektīviem viedokļiem. (Public Productivity Handbook, 1992).

Valsts sektora darbības efektivitātes jēdziens *Public sector operational efficiency concepts*

Pirms uzsākt diskusiju par valsts sektora darbības efektivitātes izvērtēšanas iespējām, svarīgi uzsvērt, ka jebkuras darbības kvalitātes izvērtēšanas kontekstā ekonomiskajā literatūrā aktualizē šādus jēdzienus:

- ieguldījumi (input);
- izlaide (output);
- rezultāts (outcome);
- efektivitāte (efficiency);
- rezultativitāte (effectiveness);
- produktivitāte (productivity).

Veicot šo jēdzienu terminoloģisko pielietojumu, var apgalvot, ka pastāv problemātika šo jēdzienu izpratnē un interpretācijā. Autores uzskata, ka galvenais iemesls tam ir pretrunas jēdzienu tulkojumos. Līdz ar to, autoruprāt, valdības darbības efektivitātes izvērtēšanai ir jānodrošina kompleksa pieeja, pievēršot uzmanību visiem rādītājiem. Autores piekrīt viedoklim, ka valsts pārvaldes darbības kvalitātes izvērtēšanai ir jāizmanto rādītājs „izpilde” (performance), un kā būtiskākie komponenti tā kompleksai analīzei tiek izvirzīti sekojoši:

- rezultativitāte (effectiveness);
- ekonomiskā efektivitāte jeb produktivitāte (efficiency/productivity);
- ekonomiskums (economy);
- pakalpojums un kvalitāte (service quality);
- atbilstība (compliance). (Performance Management in Government. Contemporary Illustrations, 1996)

Pētījuma autoru uzmanība tika pievērsta arī OESD (Organization for Economic Co-operation and Development) valstīs pastāvošajai efektivitātes vērtēšanas praksei. Atbilstoši organizācijas metodoloģijai valsts sektora darbība tiek vērtēta kompleksi, izmantojot dažādus rādītājus un metodes tās efektivitātes noteikšanā, bet, kā būtiskākie tiek uzsvērti šādi komponenti:

- rādītāji (performance measures);
- rezultatīvie indikatori (performance indicators). (Enhancing the effectiveness of public spending: experience in OECD countries, 2004)

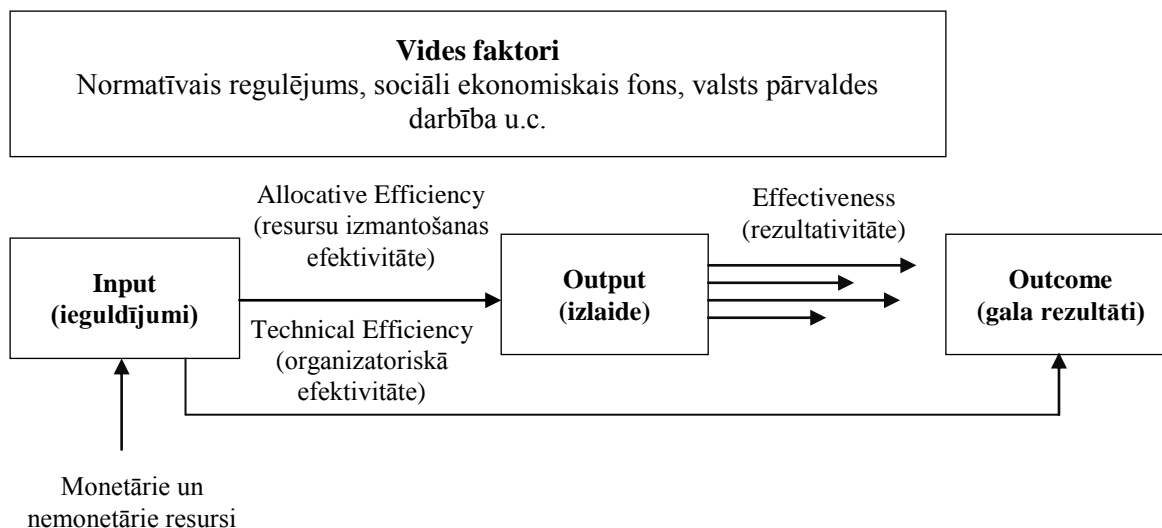
Jāuzsver, ka ekonomiskajā literatūrā pastāvošie viedokļi akcentē, ka starp abiem kritērijiem nav būtisku atšķirību, jo abi tiek izmantoti valdību budžetu programmu gala rezultātu, politiku darbības un to īstenošanai nepieciešamo resursu apjomu izvērtēšanā. Rezultatīvātes indikatori galvenokārt ir kvantitātes vai kvalitātes izvērtēšanas komponente, kas norāda uz darbības rezultātu vai iestādes centieniem reāli sasniegt noteikto mērķi. Bet, rādītāji kalpo gala rezultāta (outcome) izvērtēšanai, kā arī konkrētu politiku, programmu, iestāžu darbību un to īstenošanai izmantoto resursu (output) izvērtēšanai. (Managing Public Expenditure. A Reference Book for Transition Countries, 2001)

Pēdējos gados ekonomiskajā literatūrā tiek izvērsta diskusija, ka valsts pārvaldes darbības izvērtējumam būtiski būtu izmantot daudzfaktoru produktivitātes (multi-factor productivity) rādītājus, kuri sevī ietver darba, kapitāla, preču un pakalpojumu produktivitāti (Jurd, 2011). Var apgalvot, ka līdz ar to veidojas strukturēta pieeja valsts pārvaldes darbības izvērtēšanā atbilstoši konkrētajiem ieguldījumiem un sasniegtajiem rezultātiem.

Veicot valsts sektora darbības efektivitāte jēdziena izpēti ekonomiskajā literatūrā, var secināt, ka tas sevī ietver divus būtiskākos aspektus – ekonomiju un rezultativitāti. Līdz ar to efektivitātes izvērtēšanai tradicionāli tiek piedāvāts attiecināt izlaidi (output) un ieguldījumus (input). Bet, tiek uzsvērts, ka tādā interpretācijā jēdziens „izlaide” tiek uztverts ļoti šaurā izpratnē, jo galvenokārt ir saistīts ar padarīto, bet, valsts darbības sfēru nevar novērtēt tikai ar preču un pakalpojumu apjomu. Būtiska ir to spēja apmierināt sabiedrības locekļu intereses. Tāpēc ir pamatota nepieciešamība ieviest rādītājus, kuri atspoguļo valsts iestāžu sniegto pakalpojumu ietekmi uz sabiedrību. Tāpēc valsts sektora darbības efektivitātes paaugstināšanas problemātikas izpētē paralēli kvantitatīvajiem rādītājiem ir aktualizēti arī kvalitatīvie, kuri norāda uz valsts

sektora darbības rezultativitāti (effectiveness) (Public Productivity Handbook, 1992)

Autores uzskata, ka, lai nodrošinātu korektu izpratni par valsts darbības efektivitāti, nepieciešams veidot ar to saistīto jēdzienu mijiedarbību (skat.1.attēlu)



1.attēls. Efektivitātes un rezultativitātes jēdzienu konceptuālais ietvars (autoru veidots, izmantojot Mandl, 2008)

Figure 1 Conceptual framework of efficiency and effectiveness (authors' construction based on Mandl, 2008)

Var secināt, ka ieguldījumu (input) un izlaides (output) proporcijas ir uzskatāmas kā efektivitātes (efficiency) pamatrādītāji. Līdz ar to efektivitāte koncepcija sevī ietver izpratni par pakalpojumu nodrošināšanas iespēju robežām, tas ir, lielāka izlaide attiecībā pret konkrētu ieguldījumu vai zemāks ieguldījums attiecībā uz konkrētu izlaidi. Tomēr tiek uzsvērts, ka ieguldījumu un izlaides galīgie mērķi ir nodrošināt rezultativitāti, uz ko norāda gala rezultāti (outcome). Līdz ar to būtiski, ka gala rezultāti tradicionāli ir vērsti uz labklājības vai izaugsmes mērķiem, bet, jāņem vērā, ka tos var ietekmēt vairāki dažādi faktori. Tiek apgalvots, ka rezultativitāti (effectiveness) ir problemātiskāk izvērtēt nekā efektivitāti (efficiency), jo gala rezultāti ir cieši saistīti ar politisko izvēli.

Problemātiku rada arī atšķirība jēdzienu „izlaide” (output) un „rezultāti” (outcome) izpratnē un interpretācijā. Minētajā kontekstā autores piekrīt viedoklim, ka jēdziens „izlaide”(output) norāda uz īstermiņa darbības rezultātiem, bet, jēdziens „rezultāts” (outcome) - uz sagaidāmo gala rezultātu jeb noteikto mērķi ilgtermiņā. (Kotāne, 2014)

Tas nozīmē, ka valsts sektora darbības vadības procesā būtiskākai nozīmei jābūt ilgtermiņa mērķu izvirzīšanai un uz to sasniegšanu vērstām darbībām, ņemot vērā visus šo procesu ietekmējošos faktoros: cilvēkresursi, naudas ieguldījumi, pakalpojumi utt.

Akcentējot viedokli, ka jebkuras organizācijas mērķis ir īstenot aktivitātes, kuras palīdz sasniegt rezultātus pēc iespējas efektīvākā un produktīvākā veidā, jāuzsver, ka, lai to panāktu, jebkuras darbības programmas izstrādes sākumā ir būtiski izprast, ko un ar kādiem līdzekļiem vēlamies sasniegt. Līdz ar to jāpiekrīt viedoklim, ka tieši uz sniegumu vadību balstītās teorijas principi var nodrošināt attīstību un izaugsmi (Baltiņa, 2010)

Autores uzskata, ka problēmas izpētē svarīga ir valsts budžeta izdevumu jēdziena koncepcija. Tradicionāli tiek apgalvots, ka tie ir valsts funkciju un uzdevumu veikšanai budžeta likumā noteiktie naudas līdzekļi. Līdz ar to valdības izdevumi tiek aplūkoti kā skaitlisko lielumu virkne, kas sākas budžeta sastādīšanas posmā un turpinās tā izpildes laikā, nodrošinot iedzīvotājiem pakalpojumus. (Premčand, 2006) Pamatojoties uz to, tiek apgalvots, ka valdības izdevumu organizatoriskais cikls ir pabeigts, ja ir sasniegti noteikti mērķi. Kā galvenos valdības darbības rezultātus A.Premčand izvirzījusi efektivitātes rādītājus, kuri tiešā veidā atkarīgi no izdevumu vadības organizatoriskajiem aspektiem valsts finanšu resursu veidošanas un izlietošanas procesā. Līdz ar to var piekrist, ka valdības izdevumu sistēmā jābūt nodrošinātiem šādiem nosacījumiem:

- ar izdevumiem saistīto darbību analīze, to rezultativitātes izvērtēšana;
- informācijas par valdības veiktajām aktivitātēm nodrošināšana sabiedrībā. (Premčand, 2006)

Problemātiku valsts sektora darbības izvērtēšanā akcentē K.Ridlijs (C.Ridley) uzsverot, ka valsts sektorā sniegtie pakalpojumi ir pielietoto spēju rezultāts, kuri norāda uz konkrētu darba apjomu, bet, nav skaidrs, cik labi darbs ir veikts un vai tas atbilst izvirzītajam mērķim un uzdevumiem. Tāpēc nepieciešams aktualizēt jēdzienu „rezultāts” . (Public Productivity Handbook, 1992)

Tātad, valsts pārvaldes darbības efektivitātes izvērtēšanā būtiska nozīme ir tās darbībā iegūtajam rezultātam. Bet, tiek uzsvērts, ka tā interpretācijā jāņem vērā potenciālās rezultativitātes rādītāju pārklāšanās iespējas, piemēram, pakalpojumu kvalitāte, sociālie rādītāji var būt uzrādīti kā gala rezultāti, bet, darbības procesu rādītāji - kā izlietoto resursu rādītāji. Līdz ar to kā galvenie efektivitātes vērtēšanas kritēriji ir izmantoto resursu rādītāji, konkrēto darbību rezultāti un gala rezultātu (*efekta*) rādītāji. Bet, divu pēdējo rādītāju noteikšanā problemātiska ir to savstarpējo sakarību identifikācija. (N.Sivaševa, 2005)

Nostiprinoties viedoklim, ka valsts pārvaldē ir ierobežotas iespējas izmantot privātajam sektoram raksturīgus efektīvas un mērķtiecīgas darbības

novērtēšanas elementus, attīstītajās valstīs budžeta procesa reformēšanas gaitā pakāpeniski ar mērķi nodrošināt publiskā sektora pārvaldes efektivitātes izvērtēšanu tika izstrādāta un piedāvāta **rezultatīvo rādītāju sistēma**. Par galveno tās kritēriju izvirzīta valsts pārvaldes darbības atbilstība sabiedrības vajadzībām. Šajā kontekstā, pētījuma autoruprāt, rezultatīvo rādītāju sistēma var būtiski uzlabot budžeta izdevumu veidošanās procesu, pretargumentējot viedoklim, ka neefektīvu budžeta izdevumu cēlonis tradicionāli ir atbilstošās metodikas trūkums budžeta apjoma un struktūras veidošanās kontekstā.

Jāuzsver, ka ekonomiskajā literatūrā dažādi autori akcentē atšķirīgas valsts sektora darbības rezultātu izvērtēšanas metodes, un joprojām nepastāv vienots viedoklis par rezultatīvo rādītāju formulējumu. Par to liecina fakts, ka valstīs, kur ir ieviesti valsts finanšu izmantošanas rezultatīvie principi, tie ir formulēti ļoti atšķirīgi, un nav izveidota rezultatīvā rādītāja vienota definīcija. Tomēr valsts pārvaldes darbības efektivitātes noteikšanā kā visaktuālākie ir akcentēti rezultatīvo rādītāji, jo tie vērsti uz valsts pārvaldes izdevumu izvērtēšanu konkrētu valdības darbības mērķu, uzdevumu īstenošanā.

Secinājumi **Conclusions**

1. Mūsdienās valstu budžetu jomā būtiska uzmanība ir jāpievērš tādiem valsts finanšu organizatoriskajiem jautājumiem kā valsts izdevumu struktūras izvērtēšana un to vadības sistēmu pārskatīšana, kuras iepriekšējos gados ietekmēja valdības funkciju un līdz ar to valsts budžetu pieaugumus. Tas aktualizē valsts pārvaldes strukturālo pārmaiņu nepieciešamību. Šajā kontekstā būtiski ir veidot sistēmisku pieeju, ietverot atbildes uz jautājumiem: kas valdībai jā dara? kā to var izdarīt? kādi ir efektīvākie darbības risinājumi? Tas viss nosaka nepieciešamību pilnveidot valsts budžeta izdevumu plānošanas procedūras, un nozīmīgs kļūst tāds problēmjautājums kā valsts sektora darbības efektivitātes izvērtēšana.
2. Izteikta uzmanība valsts sektora darbībai tika pievērsta situācijā, kad 2007.g. ASV sākusies, kopš 2008.g. pārņemot arī Eiropas valstis, ekonomiskā krīze negatīvi ietekmēja valdību finanšu kapacitāti: samazinājās nodokļu ieņēmumi budžetos, pieauga budžetu deficīti, kas kritiski palielināja valdību kopējos parādus. Līdz ar to aktualizējās jaunas publiskās vadības (New Public Management) principu ieviešanas nepieciešamība valsts sektora darbībā
3. Valsts pārvaldes darbības efektivitātes izvērtēšanas jautājumi ir iekļauti pētījumos gan makroekonomiskajā kontekstā (J.E. Stiglitz), gan valsts pārvaldes organizācijas kontekstā (A.Premchand, M.Holzer, D.M.Fick, A.Afonso, V.Tanzi u.c.), gan arī publisko finanšu kontekstā (Dž.Miller,

- B.H.Potter, J.Diamond u.c.). Līdz ar to var apgalvot, ka ekonomiskajos pētījumos valsts darbības efektivitātes jēdziens tiek vērtēts no dažādiem aspektiem, kas rada zināmu problemātiku vienotas izpētes metodoloģijas izveidē.
4. Veicot pastāvošo viedokļu izpēti par valsts pārvaldes darbības izvērtēšanas iespējām, pirmkārt, var secināt, ka valsts sektora darbības izvērtēšana ir pozicionējusies kā pētījumu objekts dažādos zinātnes virzienos (ekonomika, vadība, politika u.c.). Līdz ar to tiek izvirzītas daudzpusīgas pieejas valsts pārvaldes darbības vērtēšanas sistēmas izveidei. Otrkārt, jāuzsver, ka pētījumi šajā jomā ir diezgan haotiski, savstarpēji nesaistīti. Joprojām ekonomisti nav izveidojuši vienotu metodiku, kas dotu iespēju izprast sakarības starp valsts pārvaldes iestāžu izmaksām un iestāžu nodrošināto pakalpojumu rezultātiem. Kā būtiskākais arguments tiek minēts, ka valsts sektora darbības efektivitātes paaugstināšanas problemātiku pēta dažādu zinātnes nozaru pārstāvji, un tiek izmantota arī atšķirīga terminoloģija.
 5. Nostiprinoties viedoklim, ka valsts pārvaldē ir ierobežotas iespējas izmantot privātajam sektoram raksturīgus efektīvas un mērķtiecīgas darbības novērtēšanas elementus, attīstītajās valstīs budžeta procesa reformēšanas gaitā pakāpeniski ar mērķi nodrošināt publiskā sektora pārvaldes efektivitātes izvērtēšanu tika izstrādāta un piedāvāta rezultatīvo rādītāju sistēma. Par galveno tās kritēriju izvirzīta valsts pārvaldes darbības atbilstība sabiedrības vajadzībām.
 6. Ekonomiskajā literatūrā dažādi autori akcentē atšķirīgas valsts sektora darbības rezultātu izvērtēšanas metodes, un joprojām nepastāv vienots viedoklis par rezultatīvitātes rādītāju formulējumu. Par to liecina fakts, ka valstīs, kur ir ieviesti valsts finanšu izmantošanas rezultatīvie principi, tie ir formulēti ļoti atšķirīgi, un nav izveidota rezultatīvā rādītāja vienota definīcija. Līdz ar to autores piedāvā valsts pārvaldes darbības efektivitātes noteikšanā kā visaktuālākos akcentēt rezultatīvitātes rādītājus, jo tie vērsti uz valsts pārvaldes izdevumu izvērtēšanu konkrētu valdības darbības mērķu un uzdevumu īstenošanā.

Summary

Nowadays, in the sphere of government budgets essential attention has to be paid to such organizing issues of government finances as evaluation of the structure of government expenditure and revision of those administration systems, which in previous years influenced government functions and consequently the increase of the government budget. It emphasizes the necessity for structural changes in the state administration. In this context it is important to create a systematic approach, including

answers to the questions: What must the government do? How can it be done? Which are the most efficient solutions? All of it prescribes a necessity to improve the procedures of planning government budget expenditure and a special attention has to be paid to the issue of evaluation of operational efficiency of the public sector.

The issues of evaluation of operational efficiency of the public sector are included in research studies in various spheres: macroeconomics (J.E. Stiglitz), organization of state administration (A.Premchand, M.Holzer, D.M.Fick, A.Afonso, V.Tanzi etc.), public finances (Dž.Miller, B.H.Potter, J.Diamond etc.). They drew attention in the USA in the 1970s- 80s and in Europe at the beginning of the 21st century when the increase of the budget deficit made the society to become more and more dissatisfied with growing expenses at government and municipality levels.

After studying existing opinions on evaluation options of public sector operations, one can draw conclusions that research studies in this sphere are rather chaotic and mutually unrelated. Economists have not made unified methods yet, which could help to understand a connection between expenditure of state administration institutions and results of services provided by these institutions. One of the most important arguments is that the issue of increasing operational efficiency of the public sector is being studied by so many different scientific branches, and they also use a different terminology.

As there is an opinion that the state administration have limited possibilities to use elements characteristic of the private sector to evaluate efficient and purposeful activities, during the reforms of budget procedures the developed countries have elaborated and offered a system of performance indicators in order to gradually ensure efficiency evaluation of the public sector operations. Its main criterion is the conformity of state administration operations to the needs of the society.

In economic literature various authors emphasize different methods for evaluation of work results of the public sector, and there is not a unified opinion on the formulation of performance indicators.

During the reforms of government budgets, there appeared a necessity to emphasize the results of current programmes in budget preparation. It means that institutions have to identify the results of the programmes they have already implemented when they decide on their tasks and make a demand for budget funds. Thus, a new approach to budget making determined a necessity to integrate information not only on government activities but also their results in the budget procedure.

When making a result-oriented budget and planning expenditure, it is necessary to follow not only the aims of particular political programmes and their implementation activities but also to take into consideration the evaluation of results by using quantitative and also qualitative measures. Such a system offers a chance to move from the control of investments to the control of results or gains, which ensures more efficient planning of budget expenditure.

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MĀKSLA UN DIZAINS
ART AND DESIGN

THE HEALING OF BLINDNESS IN APOCRYPHAL BOOKS AND THE FINE ARTS

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Abstract. *The image of Tobit and Tobias in apocryphal books and the fine arts gives the possibility to break a code of the attitude of society to the person having the sight disabilities in contemporary society. We can assume that the image of Tobias which has lots of positive moral features in the development of history could have the influence to the formation of a positive attitude of the society to sightless people. The history of Tobias's life and especially its happy ending had a great influence on the formation of the image of the guardian angel and the spread in Italian Renaissance pictorial art as well as in the art of other countries starting from the fifteenth century.*

Keywords: *apocryphal books, blindness, the fine arts, image of Tobit and Tobias.*

Introduction

Apocrypha (Gr. *apokryphos* – “hidden”) are the writings retelling in another way or supplementing the Old and the New Testaments; however, they are non-canonised by the Church. Moreover, they tell stories about the childhood of Jesus, the life of his mother Mary and her parents St Ann and St Joakim. Apocryphal books are literary texts of Jews and early Christians, which do not coincide with the official religious teaching and are not included into the canonical Bible. In some countries, these books are considered to be insufficiently sacred to place next to the Old Testament and the New Testament. Over ten such books are known, to name a few: two “Books of the Maccabees”, “Susanna and Daniel”, “Wisdom of Solomon”, “The Book of Judith” etc. “The Book of Tobit” is also among them.

The image of Tobias in apocryphal books

The myth tells about a man named Tobit, who lived in Tishbe, Upper Galilee, in Nepal's family. This man remained faithful to God even in the times when all other people worshiped golden calves made by the King of Israel, and when he was imprisoned and brought by the Assyrian King to Nineveh by the river Tiger. Living with his wife Anna and his son Tobias among pagan people, he did not give up his belief, gave alms, buried the imprisoned who were sentenced to death by the king's orders. After one of such burials he became

blind. Tobit lived in poverty; however held no anger for God for making him blind; he remained devout and honest. When once his wife Anna brought a goat, Tobit warned her: "Beware that it was not stolen. If it was, give it away to the owner because we should not eat what had been stolen, we even ought to not touch it." Anna was working hard, she sustained the family by spinning. Tobit asked the heavens for some help. Meanwhile his niece Sarah, residing in Media in Ecbatana city, addressed the heavens too; the evil spirit Asmodeus fell in love with her. This demon killed seven bridegrooms of Sarah before reaching the bed of the newlyweds. The heavens sent the archangel Raphael to help them. The old man who asked the heavens for death remembered his silver lent once in Media. He sent his son Tobias escorted by a young man Azaleas, who actually was Raphael repelling evil spirits and patronising travellers. On the first night of their journey, they stopped at the river Tiger. The young Tobias went to wash his feet. An enormous fish jumped out of water and tried to swallow him. Raphael told him to catch the fish with no fear and take its heart, gall and liver. According to the archangel, the heart and liver help repel evil spirits and gall heals blindness. After that event they successfully reached Media. Tobias took his father's loans and decided to visit a familiar Christian man whose daughter, Sarah, he foresaw as his wife, as advised by the archangel.

Raphael indicated a way to get rid of the demon Asmodeus. Tobias repelled the evil spirit by frankincense made of liver and heart of the caught fish. At night in secret, Sarah's father dug a pit intended for burying the eighth bridegroom. However, he did not predict that at that night he would have to back-fill the empty pit because Asmodeus would be defeated. The wedding of Tobias and Sarah was celebrated. The father of Sarah gave half of his property to his son-in-law and promised the second half in his will. Happy newlyweds went to the blind Tobit. Anna recognised her son from afar and rushed to announce the news to her husband. Raphael taught the young Tobias: "When you enter the house, pray, call for God and, thanking God, approach your father, kiss him and spread fish's gall all over his eyes; and then your father will see the light of the sky and will be extremely happy." Tobias greased his father's eyes. He suffered for a half an hour and peeled the ointment off as if an egg's skin. The father and the son did not know how to thank Raphael; they offered Raphael half of the property they brought. Then Raphael told the old Tobit: "As God loved you, he tested, tempered you. I was sent by God to heal you and repel the evil spirit that approached Sarah, your son's wife. I am Raphael, one of seven saint archangels, who stand in front of the Lord." Hearing this, all trembling, they kneeled facing the ground. The archangel told them: "Calm and don't be afraid! Thank God and spread his miracles!" Having said this, the archangel disappeared (Šventasis Raštas, 1999).

In this story Tobit is depicted as a believer and a man of high morality; in his earthly life God awards him. “The Book of Tobit”, entitled by a name of the main character, links the Jewish way of living and morality to eastern folklore by attractive narration favoured both by Jews and Christians. Prayers, psalms and words of wisdom wrapped up in a skilfully narrated story help understand the belief and religious milieu of an unknown author. “The Book of Tobit” was perhaps written in the early II century BC. The place of writing is unknown. The inspired author created a story consisting of three widely spread folk stories of that time:

- 1) a story “The Grateful Dead” (a story about a man who became poor, but was awarded for the burying a desecrated corpse);
- 2) a story “The Monster of the Bride’s Bedchamber” (a story about a demon who would kill bridegrooms on the wedding days);
- 3) “The Story of Achicar” (a story about a wise courtier who was betrayed by an adopted son for no reason and later justified).

The specificity of a structure, images and origin of the book come from the Bible. Even though only Ammon and Nahum are mentioned by names, the story was determined by other books of the Holy Script, especially “Genesis”, “Job” and “Isaiah”. A law of repeated remorse in “The Book of Law”, i.e. the righteous are rewarded and the unrighteous are punished, is theology of “The Book of Tobit”. Even though “The Book of Tobit” is included into a list of historical books, its content is specific. It is attributed to a group of historical books and books of wisdom. The book includes many wise sayings similar to sayings of other wisdom books (Tobit 4,3-19.21; 12,6-10; 14,7.9) as well as familiar themes of writings of wisdom: loyalty to the Law of Moses, the patronage of angels, the duty to take care of parents, wedlock fidelity, respect for the dead and importance of alms, prayer and fast (Šventasis Raštas, 1999). In fine art this myth was depicted by Italian, Dutch and other artists (Мифы народов мира, 1982).

The image of Tobias and Tobit in fine art

Christian fine art turned ideas of apocryphs into independent themes of paintings (Universalus meno žodynas, 1998). The image of Tobias and Tobit in the fine arts can be divided into several sub-themes:

1. Tobit buries killed Christian people.
2. The blinding of Tobit.
3. Tobit and his wife Anna.
4. Tobias and the archangel Raphael.
5. Departure of Tobias.
6. Tobias catches a fish in the river Tiger.

7. Tobias and Sarah.
8. Tobias heals eyes of his father Tobit.
9. Archangel Raphael leaves the family of Tobit.

The article presents only several most characteristic examples of the theme of Tobit and Tobias of our collection comprising 204 reproductions of artworks. An Italian painter Andrea Verrocchio (1435–1488) is one of the first authors on the theme of Tobit and Tobias familiar to us. He was a goldsmith, sculptor and painter of Italian Renaissance, who turned his workshop into a centre of the sunset of Florentine early Renaissance, where a number of artists who later became famous obtained their education (Universalus meno žodynas, 1998). In A. Verrocchio's canvas the major figure is of an angel. The painter decorated angel's clothes with elaborate embroidery and falling folds. Tobias is recognised from a fish that he carries; he is led by the archangel Raphael holding a box full of fish's gall which will cure Tobias's father's unseeing eyes. This piece of art is not only by A. Verrocchio, but also by other members of the Florentine studio. Perhaps, a puppy was painted by Leonardo da Vinci (Lodwick, 2003). The travellers walk along a slope, a perfectly painted landscape including mountains, a snaking river and a bridge is behind them. The painting is exhibited at the National Gallery in London. The composition of this painting was copied in detail by A. Verrocchio's contemporary, fellow citizen Piero del Pollaiola (1443–1496) who painted a picture "Tobias and Angel". The main part of the canvas is covered by the archangel Gabriel having a handsome young man's face. The young Tobias who is smaller and younger, holds archangel's arm, walking behind. It can be assumed that the travellers are coming back home because Tobias carries the fish. Like his predecessor, the painter neglects the context of the apocryphal book in which the enormous fish almost swallowed Tobias; later on the angel told Tobias to catch it and use its heart, gall and liver to combat the evil spirit Asmodeus and cure blind father's eyes. In the painting Tobias easily carries the "small fish" by one hand, comfortably tied with a rope. The picture is exhibited in Turin (Italy), Sabauda Gallery (Мифы народов мира, 1982).

An Italian artist of early Renaissance, Pietro Perugino (1448–1523), who together with other famous masters painted frescos on the walls of the outstanding Sistine Chapel, also dealt with the theme on Tobias. He left a painting "Archangel Michael and Archangel Raphael with Tobias". P. Perugino freely interprets the story of Tobias. In his painting he depicts the archangel Michael who was not mentioned in the story of Tobias. We can draw an assumption that P. Perugino painted the archangel Michael because that was a creature most trusted by God and heading the heavenly soldiery. Michael was a brave warrior, reliable guardian, protecting from evil, the superior over all angels. Michael was the mightiest archangel. In the Old Testament, Daniel calls

Michael a powerful grandee and a guardian of the Israeli nation. The name Michael means “who is like God”; the name suits the angel holding much power. Michael is a fighter for order and justice in each step, fights with evil, takes care of ill people (Lewellyn, 2003). Perhaps because of all these Michael’s strengths P. Perugino depicted him beside the archangel Raphael in his picture. Another moment of free interpretation in the painting under analysis focuses on Tobias who is depicted not as a young man but a boy led by Raphael holding his hand. P. Perugino’s pieces of art are characteristic of slim figures, simple composition of a painting, deliberate perspective, idealised mood of characters. This piece of art in oil on wood is exhibited at the National Gallery in London.

In the Louvre Museum, there is a famous painting by a Dutch artist Peter Paul Rubens (1577–1640), “Tobias Healing His Father’s Blindness”. This painting depicting several figures bears an exceptional feature: in no other painting on healing Tobias familiar to us we can find his blind father with his head covered with a cloth which slightly contrasts old man’s bare feet. The painting is also outstanding among other authors’ works for its dynamism. The painter who favoured expressiveness and decorativeness not only depicted his characters at the background of rich architecture, but also placed one decorated column at the right-hand front plan. No information was found on whether the Dutch grand master or his disciples A. van Dyck, J. Jordaens, F. Snyders and other attempted to transpose this painting onto canvas.

An Italian painter Bernardo Strozzi’s (1581–1644) cultural legacy includes “The Healing of Tobit by Tobias” (1625). The plot of the painting includes major characters only. At the centre there is the blind Tobit wearing ornate silk clothes; other characters are also finely dressed: Anna, the son healing his father and the angel behind them with spread wings. Beside them lie a huge fish and a dog watching the procedure of healing. At a greenish background there is a fragment of a fireplace and a dark curtain. The son’s face is depicted without any outstanding features. The painting may be characterised as unfinished, created in a hurry. This canvas is exhibited at the Cleveland Museum of Art (USA). Perhaps, a notice on B. Strozzi’s painting “The Healing of Tobit by Tobias” (painted in 1625) is correct because ten years later the artist returned to this theme and brilliantly completed the artwork. This canvas of rich colouring was painted in 1635 and is exhibited at the Hermitage Museum in Saint Petersburg. It should be admitted that B. Strozzi did not follow the context of “The Book of Tobias” in which blinded Tobit suffered and lived in poverty. Regardless, in both variants of the paintings (created in 1625 and 1635) the painter depicts Tobit wearing fine clothes. A wish to demonstrate the ability to render the characteristics of fabric, gloss of silk and satin overshadowed the mythological context. The title of the painting already indicates its content. At the front there is the young Tobias kneeling on one knee, suggesting a handful

of treasures taken out of a vessel to the angel as a reward for provided help during the journey and the healing of the father. The youth is persuading the angel and even touches an edge of angel's clothing. Having regained the eyesight and treasures, Tobias's father also tries to persuade the angel to accept gifts. He is ready to give the second part of the restored property. At the second plan of the painting three women are talking to each other, two of them probably are Anna and Sarah. This masterpiece had a long journey being possessed by rich Italians, until it has been bought by the Grand Duke of Lotharingia in 1832. Presently, the painting is exhibited at the Palatine Pitti Gallery (Italy).

An Italian painter Domenico Fetti (1589–1624) presents his interpretation of an episode of this story in the picture "The Healing of Tobit". Here not the son, but the angel spreads fish's gall over Tobit's eyes. Here Raphael is depicted wearing red clothes and blue wings. In his left hand the angel holds the curing ointment, with his right hand the angel strokes over the eyes of the blind man. Beside the sitting old Tobit there is Sarah standing and Anna watching the healing. Faces of all the characters are focused; it seems that a dog beside them is also calm. The painter does not follow the subtleties of the story and depicts Tobit sitting not in his shabby dwelling but rather neat stairs of a wealthy building with columns. Between the columns there are seen several figures of dressy people. On the left hand side, there is a landscape depicting green trees and clouds against the blue sky. This is a pleasant example of classical Italian painting. This small oil painting on canvas (created in 1620–1623) is exhibited at the Hermitage Museum in Saint Petersburg.

A French painter Jacques Blanchard (1600–1638), who especially favoured mythological and religious themes, depicts major characters of this story in his painting "Tobias Healing the Blindness of His Father". The old Tobit, being touched, raises his arms, stretching his long, old fingers. His son, holding a vessel with the cure in his left hand, spreads the ointment with his right hand on his father's eyes. The leaning and excited Anna is being calmed by the archangel, pointing his finger to the sky and saying that everything is in God's will and we should trust God. A young pretty Jewish girl, perhaps Tobit's niece Sarah, is standing behind Tobias. The artist dressed the son and the father in luxurious clothes. The piece of art has been created under the influence of the Italian school. J. Blanchard got the creative impulses from painters of the Venetian school, P. Veronese and Titian. The canvas displays subtle colouring, earning him the title "French Titian" (Universals meno žodynas, 1998). This middle-size piece of art in oil on canvas is exhibited at Bordeaux Museum of Fine Arts (France).

The mythological theme was especially favoured by a Dutch painter Rembrandt Harmenszoon van Rijn (1606–1669). Well-known masterpieces on the mythological theme: "Danae", "The Return of the Prodigal Son", "The Wedding

of Samson”, “The Blinding of Samson” etc.; however, the dearest story on the theme is the story about Tobit and Tobias. This is an extensive gallery of drawings, engravings and paintings: “Tobit and Anna with the Goat”, “Sleeping Tobit”, “Blind Tobit”, “Tobias Healing His Father’s Blindness”, “Archangel Raphael Leaves the Family of Tobit”, “Tobit and Anna” etc.

As far as we know, it was in 1651 when the great master returned to the theme for the last time; he created an engraving “Blind Tobit”. The picture depicts Tobit hurrying to open the door. Possibly, the painter depicted a moment when the father heard the steps of his returning son. Anxiety and longing reflected on father’s face prove this version. In the engraving, the painter emphasises Tobit’s blindness: the blind man is about to touch a wall while searching for the door with his right hand. The etching perfectly renders the dynamism of a movement. Tobit is in a hurry, a dog is wagging between legs. The old man’s dwelling is suggestively depicted: a spinning wheel lying on the floor overturned by the man in a hurry, a shabby armchair by the fireplace. This etching belongs to a private collection; nevertheless, it is often on display at Amsterdam Art Museum.

The grand Dutch master of painting depicting the story of Tobias thoroughly followed the narration of “The Book Tobit”. His creative legacy is versatile: group portraits, biblical scenes, landscapes, thus avoiding specialisation in one genre, contrary to the convenient tradition in painting. He experienced many contrasts. Since 1631 the apogee of his career began: he became one of the most popular painters, obtained a big studio, stocked a collection of fine art, had a representational house. In 1656 he had financial problems, his house and property were put up for sale (Universalus meno žodynas, 1998). We may draw an assumption that such rich and diverse life experience enabled him extensively reflect various social strata. Perhaps, not accidentally there are several beggars and disabled people depicted in the total of 300 etchings and 1600 drawings. The grand realist adequately reflected the milieu of that period, without decoration and refinement.

A Dutch painter of the seventeenth century, Rutgers van Nieval, dedicated one of his pieces to the theme of Tobias. His painting “Tobias Heals His Father’s Eyes” is interesting not only by its artistic value, but also by the story of a tragic death of the last owner of the painting. This canvas belongs to the collection of artworks of the deceased Lithuanian priest Ričardas Mikutavičius. The entire painting is wonderfully lighted by a candle. The plot is traditional: the son using a feather spreads the fish gall over father’s unseeing eyes, whereas the wife Anna and the angel, who assisted in obtaining the miraculous cure, are watching this exciting procedure. An exceptional feature of this canvas is that the painter depicted the angel Raphael having the face of a boy, similar to traditionally depicted angels cupids. Whereas in the myth Raphael is a young

man who helped Tobias cope with many difficulties throughout the journey. There are several horizontal dark strokes across the painting. The painting was created on wood; therefore, stripes could appear over several hundreds of years in the places of joint wooden planks.

If Gustave Dore, Julius Schnorr von Carosfeld became famous for creating engravings depicting biblical scenes, an Italian sculptor Domenico Mastroianni earned his fame by created relieves based on major events of the Old Testament and major characters of this source. Moreover, this author depicted characters of apocryphal books. Extremely expressive is a relief by D. Mastroianni, “Blind Tobit”. At the centre of the relief, Tobit sits in his room. The painter renders blindness of the character by the details of closed eyes and reclined head. Tobit strokes the dog with its front legs on Tobit’s legs. Among utensils, we notice a shovel used by Tobit to dig several pits intended for burying Christian prisoners sentenced to death by the order of the Assyrian King. The in-depth image is depicted masterfully. At the third plane there are two hardly visible human figures. Perhaps these are the son and wife of Tobit. The relief finely renders Tobit’s disability and suffering.

A twentieth-century African painter Heribert Reul (b. 1911) has created stained glass for one of churches in Togo, “The Healing of Tobit”. Three characters are present in the healing procedure: the old Tobit, his son and the angel. If European painters depict the blind man, Tobit, sitting, H. Reul portrayed him standing. Blindness is clearly rendered: the old man’s eyes are closed, he holds a stick. His blobber-lipped son is spreading the ointment on father’s eyes. The angel stands behind, holding a green fish in his hand. The angel is depicted without wings. Like in majority of art works depicting the story of Tobit, the procedure of healing is observed by a puppy. The father is depicted wearing a head covering, quite too big to be a Jewish kippah; the son wears a head covering resembling a turban. An outstanding feature of the painting under analysis is that all characters of the episode from Tobit’s life, i.e. father, son and angel, are black men.

The analysis of artistic reproduction of 204 paintings of the fifteenth–twentieth centuries shows that the theme of Tobit and Tobias was the most popular in the seventeenth century. 116 pieces of art (56.8 per cent) of our collection are attributed to this period. Mostly the theme of Tobit and Tobias was favoured by Dutch and Italian painters. We can single out a group of painters who especially addressed this theme and created not one but several pieces. Some of the depicted the entire life story of Tobit and Tobias: P. Rubens, B. Strozzi, N. Cornelis, A. Vaccari, B. Covalino. Rembrandt rendered the life story of Tobit and Tobias through 26 drawings, engravings and paintings familiar to us.

Discussion

The exploration of the theme revealed some issues to be discussed. First of all, the problem of usage of the names occurred. One of the apocryphs / apocryphal books was entitled “The Book of Tobit”; it was about the life story of a devoted and good-hearted Jew who was taken to Nineveh as a prisoner when Assyrian people took Jerusalem in the VIII century BC. The father had a son Tobias; however, in some literature sources they father is called Tovit and the son is called Tobias. Painters entitling their paintings usually gave the name Tobias to both father and son. We may draw an assumption that these differences between names have occurred due to mistakes in translation because sources were translated from Hebrew into several languages, thus the names and place names were altered. Moreover, the same names in different languages are different. For instance, Tobias in Lithuanian is Tobijas, in English Thobias / Tobias, in French Tobie, in German Tobias, in Jewish Tobi.

Another characteristic incorrectness in titles of the paintings: the archangel Raphael is entitled as angel. Angels are treated as God’s messengers. These creatures are sent to provide help to people, to warn them or send an important message. Archangels are powerful creatures, especially close to God, i.e. angels of a higher rank.

The Bible lists three archangels: Michael, Gabriel and Raphael. Other two groups of angels are cherubs and seraphs. There is one important difference between archangels and cherubs: archangels communicate with people on the Earth, whereas cherubs and seraphs do not (Lewelly, 2003). In “The Book of Tobit”, the young Tobias was escorted by the archangel Raphael because he fosters the blind, doctors, sisters of mercy and travellers. In literature in Lithuanian, Raphael (Lith. Rafaelis) (Hebr. Raphael – “God healed”), the archangel acknowledged not only by Christians but also by Muslims, who tames evil spirits, illnesses, is tried to be named Rapolas. This name was Lithuanianised by D. Ramonienė, the compiler of “The Dictionary of Christian Iconography” (Krikščioniškosios ikonografijos žodynas, 1997), and A. Karsokienė who translated from English C. Llewellyn’s book “Saints and Angels”; after Lithuanianisation Rafailas turns into Rapolas. We maintain that Rapolas and Rafaelis are two different names: Such Lithuanianisation of the names is unreasoned and useless.

The story of the life of Tobit facilitated the popularisation of the concept of a guardian angel. Many Christian people believe that we have guardian angels protecting and helping us. It is considered that at birth each person gets a guardian angel who escorts throughout life. This comforting idea exists for thousands of years now; it is mentioned in the Bible (Lewellyn, 2003). The concept of the guardian angel was formed in Judaic apocryphal writings

(Ramonienė, 1997). As D. Ramonienė holds it, the plot of Tobias made much impact on the formation of the image of a guardian angel and the spread of this image in Italian Renaissance paintings and pieces of art in other countries in the seventeenth century. However, as it was mentioned earlier, an Italian painter Andrea Verrocchio was one of the first painters to use this theme; in 1470–1480 he painted “Landscape with Tobias and the Angel”. His fellow citizen Filippino Lippi painted “Tobias and the Angel” in 1480. Painters even in titles of paintings used the concept of a guardian angel and portrayed an image of a guardian angel. Thus, an image of a guardian angel began formation in Christian fine art in the fifteenth century.

Paintings on the theme of Tobias made an impact on people’s consciousness greater than just objects of aesthetical appreciation. It was believed that images of Tobias and a guardian angel protected during journeys; therefore, paintings would be commissioned if someone planned to travel. Other people willing to regain vision would purchase paintings depicting plots of Tobias’s life story (Lodwick, 2003).

The story of the life of Tobias is an excellent material for moral education of pupils. Examples based on this theme can be used in fine art as visual material. Apocryphal books could be more extensively analysed during lessons on religion.

A blind man Tobit both in his life story and paintings, sculptures, is depicted as a man of high morality, who patiently embraced his disability, even in hardest moments did not lose faith which actually saved him. An image of the Old Tobit became a standard of morality. A pro-image of this theme is found in a story about a miraculous healing of a blind man in the Gospel according to John (John 9, 1–1).

Conclusions

1. Realistic pieces of art adequately reflected everyday life of people, expectations of the disabled of a particular period of time.
2. Some artists painting on the theme of Tobit and Tobias did not follow the texts of “The Book of Tobit”.
3. Stories on miraculous healing of eyes provided much hopes and strength to people, especially those who were highly religious.
4. The positive image of Tobit made an impact on positive societal attitudes towards blind people throughout history.
5. The story of the life of Tobit is suitable for moral education. Fine art examples on this theme could be used as visual material. Apocryphal books could be broader analysed in lessons on religion.

6. The story of the life of Tobit and especially its happy-end could have made an impact on formation of a positive image of a guardian angel, starting from the fifteenth century and spreading not only in Italian fine art but also in other countries.
7. The theme of Tobit and Tobias was the most popular with Dutch and Italian artists of the seventeenth century.

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DESIGN THINKING MODELS IN DESIGN RESEARCH AND EDUCATION

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Abstract. *Design thinking has become a paradigm that is considered to be useful in solving many problems in different areas: both in development of design projects and outside of traditional design practice. It raises the question - is design thinking understood as a universal methodology in all cases? How it is interpreted in design education? The analysis of theoretical and design related literature indicates different basic and contextual challenges facing design today: increasing scale of social, economic and industrial borders; complexity of environment and systems; requirements in all levels. As specialists and researchers in the field of design have concluded, here are multiple disconnects between what the graduate design schools are teaching at the level of methods and what skills is already needed. The problems have been found also in interdisciplinary cooperation and research.*

In the context of design thinking models and problem solving methods, the analysis shows that design education implementers in public higher education institutions in Latvia are ready for local and global challenges.

Keywords: *design thinking, design education, challenges, Latvia.*

Introduction

Latvia is a relative newcomer to the design arena, still, the global labour market and the demands for the employed in the field of design are significant factors in the context of design education development.

The discussions between Ana Barroso and G. K. Van Patter (Van Patter, 2015a; 2015b) drew authors' attention. Theorists and practitioners, who study design or are engaged in one of its' fields, are usually divided into 'Design Community' and 'Non-design Community'. As G. K. Van Patter points out – the problem is the „Failure/Slow Change on the part of deeply entrenched forces within the design community to allow Design Thinking to significantly evolve and change beyond their own traditional skill sets” (Van Patter, 2015a).

Are Design program graduates educated enough to find solutions in the face of different situations in their practice?

Although design education has become more interdisciplinary “it is mature the need for a new kind of designers, one that has traditional skills and yet a

much broader perspective on problem identification and solving” (Quartz & Co et al., 2011).

However, as pointed out by G. K. Van Patter (Van Patter, 2015b), “here is multiple disconnects between what the graduate design schools is teaching at the level of methods and what emerging practices is already working on, what skills is already needed. At that time and still today there was a heavy emphasis on product/service design in graduate design education”.

The aim of the research: to summarize topical studies and opinions in design fields and in the context of education development, in order to set the aims of design education in Latvia, corresponding to the local and global challenges.

Methodology

The analysis of scientific and design related literature, the information available in the industry-related websites was carried out to ascertain the main challenges in the field of design and design education, as well as the essence of design thinking models and methodologies.

Triangulation method has been applied in the analysis of literature and information from design field related web sites and social networks. In the study of design thinking models comparative analysis has been applied.

The challenges in the field of design and education

Today many companies worried by globalization are rethinking their production processes and questioning their beliefs in terms of business and marketing, and thus hiring massively and differently (Cumulus, 2015). In this context the authors of the article agree with the author of the book „Designer: Careers and Professionalization” (Guellerin, Minvielle, deJacquilot, 2010) summary (Cumulus, 2015): if in times past students were evaluated only based on their technical skills, in future even more will be need for designers who are willing to work with the more systemic and strategic approach in a larger scale.

K. Friedman (2003) points out that design as an integrative field in general is related to six common domains: natural sciences, humanities, social sciences, services, art, technologies and engineering sciences. „Design may involve any or all of these domains, in differing aspects and proportions. These depend on the nature of the project at hand or the problem to be solved” (Friedman, 2003). Depending on the problem to be resolved, activities and research in design process can be carried out on macro, average and micro level, and on each level it is necessary to use corresponding approaches and methods.

Most frequently the reasons of failures are methods, as well as the lack of systemism and overall comprehension.

K. Friedman (2003) points to the basic and contextual challenges facing design today: increasing scale of social, economic and industrial borders; complexity of environment; requirements in all levels - production, distribution and control.

Basically the same idea in the context of design education is pointed out by G. K. Van Patter (2015b). „We (Humantific, *aut.*) identifying a dozen method related shifts underway in practice and not yet present in design education.

These include: (1) from tiny scale to large scale challenges; (2) from low complexity to high complexity; (3) from defined to fuzzy; (4) from internalized process to externalized process; (5) from downstream to upstream starting points; (6) from tactical to strategic; (7) from strangemaking to sensemaking & changemaking; (8) from thinking & doing to thinking, doing and enabling; (9) from prescriptive to orchestrative; (10) from intertribal communication to cross-disciplinary communication; (11) from deliberate exclusion to deliberate inclusion, from magic thinking to skill-to-scale, etc. (Van Patter, 2015b).

As the problem G. K. Van Patter (2015b) indicates the necessity to clarify the term ‘Design Thinking’ as an approach and united, universal methods as a set for the achievement of different goals.

In order to clarify how the process of design, referred to as ‘Design Thinking’, is interpreted, in the further research the authors analyse the information from scientific literature and web sites related to the field.

Design Thinking

Like the term ‘design’, the term ‘design thinking’ also does not have a single, generally accepted definition. Various authors offer explanations and interpretations of the term. Basically three discourses are distinguished in the literature on design thinking: design discourse, cognitive discourse and management discourse (Haasi & Laakslo, 2011).

Design thinking is defined also as an innovation and a strategy oriented approach that “blends an end-user focus with multidisciplinary collaboration and iterative improvement to produce innovative products, systems, and services” (Meinial & Leifer, 2011).

As new design fields are developing, the understanding of design thinking is associated with complexity and systems theories (Dunne & Martin, 2006; Wieland & Kaartemo, 2011; Pourdehnad et al., 2011). J. Pourdehnad (Pourdehnad et al, 2011) believes that first generation design thinkers are professional designers who develop design projects for clients using corresponding approaches and methods. Second generation design thinking is

related to obtaining and aggregation of fragmented information from different interested parties, in order to develop design solution. Third generation or design thinking in the systemic thinking discourse: interested parties are designers, and the best way of ensuring the success is to allow each of them to formulate what design is. The success in this context is directly proportional to the level of interest. Forth generation design thinking is systemic.

After summarizing the information in the scientific literature, web sites and social networks, the authors come to the conclusion that the term ‘Design Thinking’ is interpreted according to the concept of design – both as the creation of material/non-material values, and strategic and systemic approach in the problem solving. It is impossible to create one design thinking model and methodology suited to achieve any goal in any context and scale.

The authors continue with the analysis of design thinking models in the context of different problem solving, proposing the following criteria:

- a) the starting point for work/reference;
- b) provisional results;
- c) design process;
- d) the scale of the problem;
- e) methodics.

Design thinking models

Design thinking models indicate the research structure that is a logical consequent system of methodological, methodical and organizationally technical procedures that allow obtaining credible data on researchable phenomenon or precessing and applying it in practice for process management and predicting.

1. The process that starts with clearly defined goals/tasks and assumptions on anticipated results (linear process).

Linear design cycle: analysis → synthesis → development → judgement making, that continues with optimization, evaluation and implementation (Asimow, 1962), corresponds to recursive process logic by A. H. Bridges (1986). The goals and tasks in the linear design process are clearly defined, solution could be evaluated as correct or incorrect, the task of work (problem) belongs to the set of similar problems, all of which are solved in this way or another, limited alternative solutions are possible (Conklin, 2006). This design process is suitable for the development of small-scale projects, where terms and restrictions are known or quickly identifiable.

2. The process that starts with defined goals/tasks and partly predictable results (dynamic process).

As admitted by M. Compton and S. Barrett (2015), the design process is often non-linear and complex, involving simultaneous consideration of multiple types of information”, thus, design development is a dynamic process.

Design schools (Stanford University, 2016a; Singapore Polytechnic, 2016; Aalto University, 2016), enterprises and organizations (IDEO, 2016; Design Council, 2008) offer design process/thinking models that are mostly divided into three (IDEO, 2016) four (Singapore Polytechnic, 2016; Aalto University, 2016; Design Council, 2008) or five phases (Stanford University, 2016), also including feedback between stages.

A defined number of phases in practice do not exclude the division into smaller intermediate stages or merging of separate stages.

A range of methods is offered in design research and practice, in order to comprehend the basic problem, users’ needs (qualitative research, observations, ethnographic studies, surveys, focus group interviews, data analysis and synthesis), to work in a team, to present a project, as well as creative thinking techniques.

This is an approach, that is based on analogies with designing process: the research of users needs/terms, interactive designing process and „learning by doing”, suits for the development of new products/services and the perfection of existing ones on a wider scale, and undeniably for the learning process, as well as it could be part of the development of a complex project.

3. Partially or fully systemic process that starts with defined goals/tasks and partly predictable results. A similar starting point is in a ‘Double Diamond’ (Design Council, 2008) design thinking model (Figure 1).

This model, used in business and marketing, basically includes all the components and methods (qualitative and quantitative) of strategy development and suits for a work in a team.

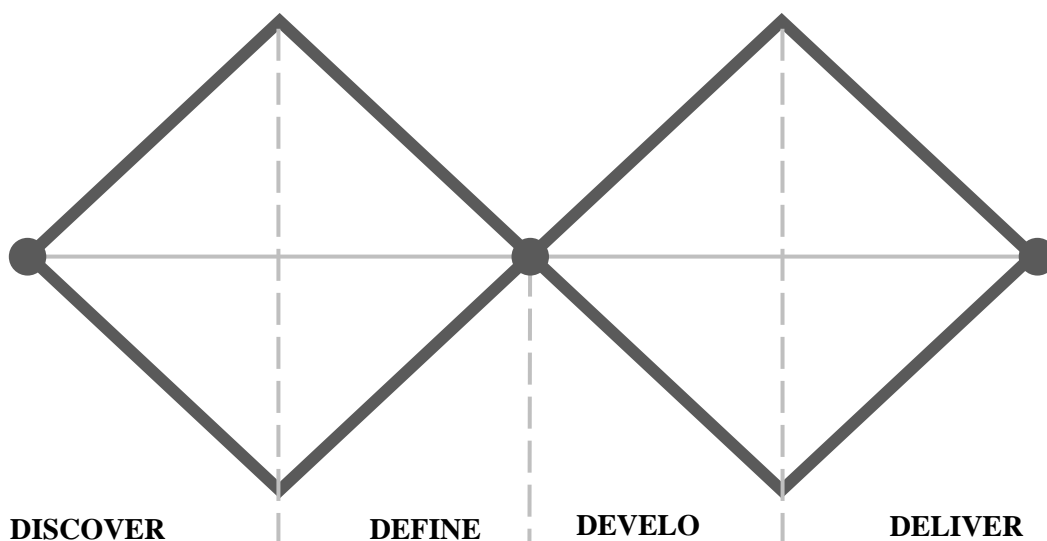


Figure 1 Design Thinking 'Double Diamond' Process Model ([www. onemillionsigns.com](http://www.onemillionsigns.com))

The model presents four main stages across two adjacent diamonds. As illustrated in the Double Diamond model's first diamond, the problematisation and understanding of a problem are equally important. Each of the four stages is characterised by either convergent or divergent thinking (Double diamond, n.d.).

4. A design process, that starts without assumptions on the possible results (dynamic, systemic, up going process).

This model is necessary in cases when basic problem is defined, changes are required, but it is not known how to achieve it.

This approach is related to complex problem solving, systemic approach and interdisciplinary research in the development of medium and large scale strategic, economic, politic, environmental and social projects.

Systemic thinking that stems from the systems theory is an approach and methodologies, in order to obtain thorough knowledge and create concepts on the essence of reality (Mattesich, 1982). Systemic thinking replaces reductionism (firm belief that anything could be divided into components and evaluated isolatedly), determinism (fatalism) with expansion (a system can always be a part of a bigger system) and indeterminism (probabilistic thinking) (Pourdehnad et al., 2011).

Politology and social sciences are related to so-called „soft systems”: open, dynamic systems – life systems, social systems and their research methodologies.

The problems are caused by the root of the problems being solved – part of them are “wicked” (Rittel & Weber, 1973). Unstructured, unclearly defined problems belongs to the group of social problems, characterized by the variety of information, a great number of involved parties and decision makers, contradictory values and hardly definable framework, because every problem is linked with another problem (Conklin, 2006). In the problem solving of such type a wide range of quantitative and qualitative methods can be applied.

As the problems to be solved are mostly multidimensional, the development of a project is divided into separate disciplinary components or modules. In the process of interdisciplinary design, while defining overall goals, tasks and values, the points of contact of modules and their functioning boundaries, objective parameters for evaluation of the overall solution, each of the parties involved develop a certain part of the project. The merging of project components, acknowledging that there are only a few possible solutions, occurs choosing one, that will satisfy the best all the parties involved (Conklin, 2006).

The communication in an open system could be considered as an integrated process. The identification of new contact points and information flow between the system elements is a crucial factor, and to a large extent the component functioning dynamics that as a catalyst can positively affect the development of hierarchically higher system modules depend on it.

As systemic or Next Design Thinking, Humantific (Pastor, 2013) approach is interpreted, which includes both Design Thinking in design discourse, Applied Creativity Thinking, Systems Thinking, and also such modules as Open Innovation, Visual Sense Making, Innovation Acceleration, Design Research, Team Dynamics, Culture Construction, Organizational Change Making. The process begins with two questions – *what might? and what might we?* In fact, in this case the answer to the second question defines the scope and structure of the project as well.

The conclusions of the chapter. While analysing design thinking models and the essence of a problem to be resolved, the authors conclude that in the 1st and partly also in the 2nd case they are more analogous to ‘Red Oceans’ strategy logics – for the improvement of competitiveness within the framework of the value chain, although, they do not exclude the possibility of finding principally new solutions.

However, also in the case of the *Double Diamond* design process, the starting point – „initial idea or inspiration in which user needs are identified”, is not applicable in situations when existing problem is only an upper layer or easily identifiable part of interrelated problems.

In the 4th case the specifics of the project development states the necessity for the interdisciplinarity and a wide cooperation network.

In the process of design education this approach and methodologies, according to the possibilities and necessity, could be included both in interdisciplinary study programmes and programmes of traditional design fields.

Although there are different approaches and a range of applicable methods in design thinking models, the authors consider them impossible to be classified into progressive and outdated ones.

In this context, the authors agree with G. K. Van Patter (2015a) –, when design thinking is concerned, the most important thing is to comprehend the relations between the context and methodology. Design thinking must change according to challenge scale and in each case an appropriate set of methods should be used - upstream tools are different from downstream tools.

As an example, the experience of one of the most successful interdisciplinary design companies – IDEO (2016) could be mentioned. This company develops projects at micro and macro level: both traditional design projects, Business design, Organizational Design and also social innovation projects in order to design new strategies, programs, services, products and communications. The range of methods applied depends on the projects' specificity: qualitative, quantitative and strategic methods, as well as both analytical tools and generative techniques (IDEO, 2016).

IDEO's CEO, T. Brown (2016) marks out several relevant fields that nowadays are most in need for design:

1. Serving the needs of the global poor.
2. Designing new approaches to health, including aging and the end of life.
3. Designing healthy and profitable food systems that can serve the needs of all.
4. Designing citizen-centered government services.
5. Designing the future of our urban communities.
6. Anticipating the opportunities and challenges of over-the-horizon technologies.
7. Designing the future of work and the corporation itself.

It also determines the scale of cooperation and creates preconditions that promote the merging of separate design companies into creative unions, like *kuy* (Kuy, 2016).

In order to work at such scale, T. Brown (2016) points out the design problem nowadays: the necessity for new rules of engagement with a broad set of collaborators.

Discussion

The change of the scale, the accent and the nature of work in design practice states the necessity for improvement in design education as well.

At this point it is necessary to return again to the interdisciplinary cooperation and research that in design literature does not lose its topicality.

As concluded P. Le Masson, K. Dorst and E. Subrahmanian (2013), even more than in the past, the renewal of design theory should lead to a body of sustainable, collective research. „In the broadest sense, the renewal of design theory should help to understand and support contemporary forms of collective action. Recent advances open the possibility to invent new methods, new organizations, and new forms of collaborations inside and between organizations. And – these theories could provide the basic corpus and language to educate the designers of tomorrow in the logic of creation” (Le Masson et al., 2013).

However, analysing the opinions of the employed in the field of design, problems that design education must solve in the nearest future are clearly outlining.

L. Grocott and M. Kobori (2015) highlights experiences in collaborating with scientists from other fields which led them to see the paradigmatic difference between a scientific line of inquiry and a performative approach to exploration as the primary. Considering the contribution of design expertise in the learning sciences researchers (Grocott & Kobori, 2015) identified the discovery-led orientation of design as a strength and the lack of experience with

metrics for evaluating research as a deficit. These conclusions point to the necessity to apply methods that will allow proving the credibility of design solutions.

K. Friedman (2003) believes that one of the deep problems in design research is the failure to develop grounded theory out of practice – designers often confuse practice with research. Yet the authors doubt that the summarization of separate persons' experience, that is clearly necessary, could disclose something more that it is already known and resulted in Design Thinking comprehension in the design discourse.

M. Compton and S. Barrett (2015) predict that in addition to challenges in industry, there are obviously going to be some challenges in education: (1) the relevance of research to the self-identity of the artist and designer; (2) a lack of institutional support for including research in art and design curriculum; (3) the question of whether art and design education community needs it's own Institutional Review Board (IRB).

K. Friedman (2011) concludes that researchers face challenges in interdisciplinary research arising from social, cultural, and conceptual barriers.

Designers could hardly be blamed for these problems.

An essential role plays the experience acquired in the process of professional education, where it is expected to improve design education, providing students with more profound knowledge, the development of research skills and abilities in design and related inter-fields, as well as to train for independent scientific research activity, that enables the capability to plan, implement and evaluate, orient towards lifelong learning and professional development.

Experience and challenges in the development of design education in Latvia

In the same way as in other countries, the structure of design education in Latvia corresponds with the demand for labour force in the economic sectors. Design education is a part of professional education in Latvia, therefore, the curricula are based on the requirements of professional standards set for the employed in the design fields.

In public universities, that are also scientific and research institutions, design programmes have been developed relatively recently. The main benefit for design educators and students are the opportunities to cooperate with students, pedagogues and scientists of other fields.

Research activity is integrated into the curriculum and the study process. The paradigm of design thinking is viewed critically, emphasizing more the way of thinking, obtaining information and the aspects of analysis, as

well as the competencies obtained during the project development. Comparing design thinking models, in design education in Latvia, regardless of the design field and terms of reference, there is a systemic approach to the work process, also integrating the process and methodology based on recursive logic.

The interdisciplinarity is highlighted as one of the most essential basic elements of higher education in design. The emphasis has been placed on design research and methodology in the social and business environment. The international, interdisciplinary development of study programmes and research competences is relevant. It complies fully with the implementation of „Project Europe 2030” (2010) tasks, that emphasizes various skills of the inhabitants, including skills in the digital field, ability to study, the development of cultural comprehension and the encouragement of the initiative and an entrepreneurial spirit, as well as provision of functioning knowledge triangle: education–research–innovation. The partnership between business environments, national and regional authorities and field educational and research institutions, as well as international cooperation of higher education institutions and experience of design companies of other countries could help to define competences and skills that are necessary in labour market.

As the experience of other countries has shown, the formation of shared comprehension of the role of design and cooperation among designers, representatives of the national and regional authorities, organizations and entrepreneurs brings positive results in the development and functionality of products and services, producing and marketing.

This is the main challenge in design education in Latvia, that defines both the need for the development of new interdisciplinary study programmes, and the necessity to perfect the theoretical and methodological base of the design field, as well as to continue to extend the cooperation and communication networks.

Conclusions

- Today the design industry is facing various basic and contextual challenges: increasing scale of social, economic and industrial borders; complexity of the environment; requirements at all levels.
- If in times past students were evaluated only based on their technical skills, in future even more will be need for designers who are willing to work with the more systemic and strategic approach in a larger scale.
- Most frequently the reasons for the failures of design projects and cooperation are methodics, as well as the lack of systemism and comprehensive understanding.

- The term ‘Design Thinking’ is being interpreted according to the concept of design – both as a process of material/non-material value creation, and as a strategic and systemic approach to problem solving.
- The design thinking models based on the recursive logic and their methodics are not suitable for solving complicated systemic problems, but they could be the project development components.
- Design Thinking must change according to challenge scale and in each case an appropriate set of methods should be used.
- Interdisciplinary cooperation and research as an ensurance of the design development process should be the base of the design education. For this purpose, it is necessary to increase the theoretical and methodological base in the field of design.
- The main challenge of design education in Latvia is the need to continue to develop and strengthen interdisciplinary and interinstitutional cooperation and research.

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KORPORATĪVĀS IDENTITĀTES DIZAINS – TEORIJĀ UN PRAKSĒ

Corporate Identity Design in Theory and Practice

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Abstract. *The aim of the article is to work out conception of the corporate identity design of Rezekne Academy of Technologies, having investigated the corporate identity design as the organization's business card in the context of society. The article consists of an introduction, two parts and a conclusion. The introduction describes why the topic is actual, states the aim of the article and methods of investigation. The first part summarizes and analyzes the information about a corporate identity design. The second part describes the procedure of working out of the conception of the corporate identity design of RAT.*

The methods of research: *theoretical – investigation and analysis of relevant literature, internet sources and regulatory documents. Empirical – methods of data collecting: group discussion; methods of data processing: comparative analysis, content analysis.*

Keywords: *corporate identity design, brand, branding, conception, visual identity, logo, Rezekne Academy of Technologies.*

Ievads

Introduction

Ikvienai organizācijai piemīt sava identitāte, kas palīdz definēt svarīgākās vērtības. Organizācijas identitātes pētniecība ir nozīmīga katrai organizācijai, jo ne tikai identificē tās galvenās iezīmes, bet arī parāda tās darbinieku iesaisti tajā. Identitāti var definēt kā iezīmju kolektīvu kopumu, kas nosaka lietas atpazīstamību vai apzināšanu un konstruēšanu.

Raksta teorētiskajā izpētē autores analizē jēdzienus korporatīvais dizains, vizuālā identitāte, vizuālā komunikācija, korporatīvais profils. Visi iepriekšminētie jēdzieni ir cieši saistīti savā starpā, par to liecina sastopamās saturiski līdzīgās vai pat identiskās definīcijas zinātniskajos avotos.

Raksta mērķis ir izpētīt korporatīvās identitātes dizainu kā organizācijas vizītkarti sabiedrības kontekstā, izstrādāt Rēzeknes Tehnoloģiju akadēmijas korporatīvā dizaina koncepciju.

Raksta pirmajā daļā, autore izvērtējušas korporatīvās identitātes dizaina teorētiskās nostādnes, kas sniedza pētījumam zinātnisko pamatojumu un apstiprināja izvirzītās problēmas aktualitāti un otrajā daļā aprakstīja Rēzeknes Tehnoloģiju akadēmijas korporatīvā dizaina koncepcijas izstrādi.

Metodes: teorētiskās – nozares literatūras, interneta resursu un normatīvo dokumentu izpēte un analīze. Empīriskās – datu ieguves metodes: diskusija grupā.

Korporatīvās identitātes dizains kā organizācijas vizītkarte sabiedrības kontekstā

Corporate Identity Design as the Organization's Business Card in the Context of Society

Organizācijas identitāti veido vairākas pozīcijas – uzņēmuma kultūra, attieksme pret klientiem, organizācijas reprezentācija, kas atšķir konkrēto kompāniju no citām. Visu iepriekšminēto faktoru apvienojums atspoguļo organizācijas individualitāti, tās nosaukumu, logotipu, stilu utt. Ar vizuālo identitāti var neverbāli prezentēt, radīt paliekošu iespaidu, veidot asociācijas par iestādi. Korporatīvā identitāte veido organizācijas esenci, kas atspoguļojas visā tās darbībā un ir nepieciešama uzņēmuma pozicionēšanai sabiedriskajā telpā.

Bū Bergstrems korporatīvo dizainu salīdzina ar korporatīvo profilu. Visā, kas saistīts ar apkārtējo pasauli, uzņēmumam jārikojas nepārprotami, konsekventi un uzticami. Signāli nedrīkst būt pretrunīgi, un šī komunikatīvo elementu koordinācija, ko dēvē par vizuālo korporatīvo profilu, ir viens no svarīgākajiem zīmolveidības aspektiem. Termins „profils” ir atbilstošāks par terminu „identitāte”. Profilam, ko organizācija izvēlas raidīt ārpusaulei, jābūt balstītam uzņēmuma identitātē un vīzijā (Bergstrems, 2009).

Uzņēmuma identitāte, vīzija un pamatvērtības jāpārtulko vizuālā valodā, ko sauc par vizuālo profilu (Bergstrems, 2009). Lai to izstrādātu, dizainerim jāveic visaptverošs pētījums un analīze par kādu konkrētu problēmu, kas vēlāk jāpapildina ar savām amata prasmēm un jaunradi. Vizuālais profils, izmantojot vizītkartes, vēstuļu papīru, aploksnes, mapes, bukletus, iesaiņojumu, mājas lapas un vēl daudzus citus līdzekļus, aizstāj tikšanos klātienē (Bergstrems, 2009).

Plānojot darbu pie korporatīvā dizaina izstrādes jebkurā organizācijā, katrā darba posmā ir jāpielieto stratēģiskā pieeja. Organizācijas iekšēja dizaina stratēģija apskata 3 galvenās jomas:

- korporatīvo atpazīstamību – identitāti (kas ir uzņēmums);
- organizācijas stratēģisko mērķi – vīziju (kur mēs gribam būt nākotnē),
- organizācijas profilu – korporatīvo dizainu (kā mēs gribam, lai mūs uztver) (Dinnie, 2007).

Dizaina stratēģijas uzdevums ir saprast, ko lietotājs meklē un kā uztver vizuālo informāciju, jāsaprot, kā ar logotipa dizaina palīdzību uzņēmums tiek uztverts no lietotāja puses. Uzņēmuma dizaina stratēģijas pamatvērtības ir sociāla atbildība, ilgtspēja, autentiskums, novatoriskums un radošums. Korporatīvais dizains ietver sevī gan raksturīgās zīmes, simbolus un krāsas, gan dizaina modeļus un reklāmu pārdošanas veicināšanai. Korporatīvais dizains attiecas uz organizācijas vizuālo izskatu un tās produktiem attiecībā uz mērķa auditoriju. Tas sastāv no korporatīviem vizuāliem elementiem: nosaukums, sauklis, tipogrāfija, logo vai simbols, krāsa, produktu dizains, vides dizains, reklāmas produkti, publikācijas, biroja dizains utt. (Dinnie, 2007).

No iepriekšminētā izriet, ka korporatīvā identitāte ietver sevī vairākas disciplīnas, starp kurām ir arī vizuālā identitāte un korporatīvās identitātes dizains. Raksta nākamajā daļā tiks aprakstīta un analizēta RTA korporatīvā dizaina koncepcijas izstrāde.

RTA korporatīvā dizaina koncepcijas izstrāde

Elaboration of the Conception of the Corporate Identity Design of RAT

Pirms efektīvi pozicionēt zīmolu un vēlamo zīmola grafisko identitāti ir skaidri jādefinē tā pamatojums. Tas atspoguļosies organizācijas prezentācijas materiālos, kuri konsekventi atspoguļos iestādes vērtības. Korporatīvās identitātes izstrādes process būtu uzskatāms par pabeigtu, kad ir atrasta konceptuālā atziņa zīmolam – precīza, dziļa, patiesa un visbiežāk arī ļoti vienkārša, “savīta” vienotā stāstā, kurš papildina kopējo zīmola ideju un pozicionējumu.

Organizācijas pozicionējums, kas balstīts mūsdienīgā ļoti precīzā galvenajā atziņā un ar izcilu radošo darbu pārvērsts aizraujošā stāstā, dod iespēju radīt ideju sistēmu, kur viegli neierobežoti interpretēt un pielāgot mērķiem un uzdevumiem, gan lielākās, gan mazākās reklāmas kampaņās un izejot pasaules tirgū.

Izstrādājot korporatīva dizaina koncepciju, ir jāņem vērā visas iepriekšminētās pozīcijas, jo izstrādātā vizuālā identitāte atklās sabiedrībai organizācijas vēstījumu, ideoloģiju un pasniegs to saistošā veidā, kā jaunu zīmolu. Iepriekšminētās pozīcijas veidos zīmola esenci – komunikāciju kodolu, kurš iemiesos to zīmola sabiedrības uztverē. Tieši tāpēc grafiskais dizains, logotips, nevar būt nejaušs, tam jāizriet no zīmola vērtībām un sajūtām, kuras tas grib paust saviem klientiem. Turklāt dizains nav vieglprātīgi maināms bez konceptuālā pamatojuma. Tieši atšķirība no konkurentiem un konsekvence pielietojumā nosaka zīmola stiprumu, pozicionējumu, atpazīstamību tirgū, kas ir viena no zīmola pamatvērtībām. Dizains ir zīmola valoda, kura piedod komunikācijai formu.

Izvērtējot pētījuma teorētisko materiālu, var secināt, ka Rēzeknes Tehnoloģiju akadēmija ir spēcīga organizācija ar pārvaldes aparātu. RTA ir sava vēsture, savas ēkas un skaidra nākotnes vīzija. „Rēzekne – pilsēta Latgales sirdī”. Dzejnieces Annas Rancānes citāts ir kļuvis par vadmotīvu Rēzeknes pilsētas zīmola veidošanā (Pilsētu zīmolu rubrika, 2015). Rēzeknes pilsētas centrā, Atbrīvošanas alejā 115, stāv cēla, izgaismota un pašpietiekama ēka – Rēzeknes Skolotāju institūts, ko ir projektējis arhitekts, profesors Pauls Kundziņš. 2006.gadā bija uzsākts vērienīgs ēkas rekonstrukcijas projekts un 2013.gadā augstskolas ēka tika svinīgi atklāta. „Zinību šūpulis” ir ieguvis pievilcīgu veidolu, nezaudējot savu vēsturisko auru. Augstskolas gaiteni atkal piepildīti ar studentiem, auditorijās tiek apgūtas zināšanas, kas palīdzēs studentiem pilnveidoties pašiem, augt reizē ar savu augstskolu un attīstīt dzimto reģionu (Svinīgi atklāta RA rekonstruētā ēka, b.g.). RA rektors E. Teirumnieks renovētās ēkas atklāšanas brīdī atzīmēja, „ka šī diena ienāks vēsturē arī ar to, ka no jauna tiek vērtas vaļā durvis ēkai, kura būs kā centrs Rēzeknes Augstskolas studentu pilsētiņai”. Viņš uzsvēra, ka tiks turpināts jau vēsturiski iesāktais ceļš, lai Rēzeknē būtu ne tikai izglītības, bet arī zinātnes centrs (Svinīgi atklāta RA rekonstruētā ēka, b.g.).

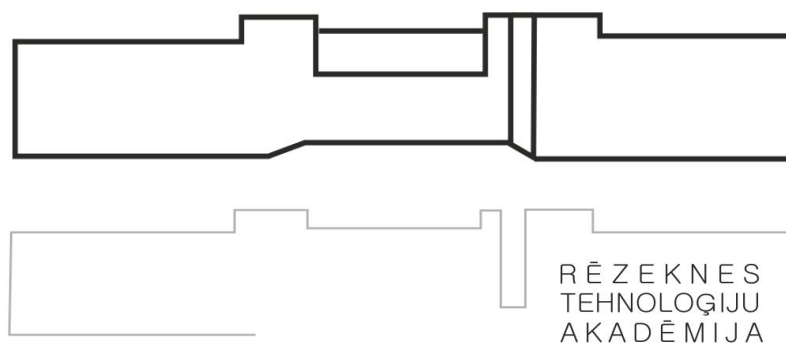


1. attēls. Rēzeknes Tehnoloģiju akadēmija
Figure 1 Rēzekne Academy of Technologies
<http://www.bt1.lv/skola/?link=00100020&subid=4285>

Rēzeknes Tehnoloģiju akadēmijas (Rēzeknes Augstskolas) vizuālās identitātes koncepcija ietver sevī galveno ideju, kam pakārtotas logotipa konstruktīvās detaļas. Koncepcijas izstrādes gaitā tika ievērotas iepriekšējos pētījumos atklātās teorētiskās atziņas par zīmolvedību un analizētas ekspertu atbildes. Rezultātā autore secināja, ka vizuālās identitātes koncepcijai ir svarīga piesaiste RTA idejiskām vērtībām:

Augstskolas vēsturiskā ēka (skat. 1.att.). 1927. gadā pēc arhitekta Paula Kundziņa (1888.g.-1983.g.) projekta celta, kā Skolotāju institūts. Ēka bija pirmā lielākā ēka Rēzeknē, kas tika uzcelta pēc Brīvības cīņām un Latgales

atbrīvošanas (Rēzekne.Valsts vidusskola un pedagoģiskais institūts, b.g.). **Māja, zināšanas, sajūtas, tradīcijas, kultūra un vieta.** RTA galvenās ēkas arhitektoniski-konstruktīvās līnijas nosaka logotipa kompozicionālo risinājumu (skat. 2.att.).



2. attēls. Rēzeknes Tehnoloģiju akadēmijas logotipa konstruktīvā kompozīcija
 Figure 2 Constructive composition of the logo of Rezekne Academy of Technologies

Austrumlatvija. Latgale, zilo ezeru zeme, piederība reģionam caur kultūrmantojumu. RTA logotipam izvēlēta zilās krāsas nianse iedvesmojoties no Latgales arheoloģiskā tautas tērpa (skat. 3.att.).



3.attēls. Latgales reģiona arheoloģiskais tautas tērps (R.Puriņa foto, Diena)
 Figure 3 Archeological national costume of Latgale Region (taken by R.Puriņš, Diena)
<http://www.diena.lv/dzivesstils/attiecibas/ludza-svetki-viena-gabala->

Tehnoloģiju attīstība. RTA burtu abreviatūru konstrukcija ir atvasināta no ģeometriskām figūrām, akcentējot eksakto zināšanu attīstību (skat. 4.att.).



4. attēls. **RTA burtu abreviatūras kompozicionālais salikums**
Figure 4 Compositional typesetting of letter abbreviations of RAT

Rēzeknes Tehnoloģiju akadēmijas korporatīvās identitātes analīzes gaitā noskaidrots, ka tās kodols balstās uz zinātnes, tehnoloģiju, reģionālās attīstības, vēstures un kultūras kategorijām, kur vide un piederība tai kalpo vizuālās identitātes idejiskai radīšanai.

RTA koncepcijas izstrādes gaitā notikušas vairākas tikšanās ar Rēzeknes Augstskolas administrācijas locekļiem, tika analizēti Rēzeknes Augstskolas stratēģiskās attīstības dokumenti, veikts pētījums par zīmolveidību augstākās izglītības kontekstā. Izstrādātā koncepcija piedāvā skatījumu, kāda varētu būt Rēzeknes Tehnoloģiju akadēmijas zīmola ideja, virziens un vizuālais risinājums. Paveiktais darbs kalpos kā platforma turpmākajām vizuālās komunikācijas aktivitātēm.

Radošie meklējumi dizainā ir cieši saistīti ar skici izstrādes procesu. Pirmajai tikšanās reizei ar RA administrāciju autores bija sagatavojušas savu piedāvājumu, kā varētu izskatīties RTA logotips. Piedāvātajās skicēs tika attēloti gan logotipi tikai uz abreviatūras bāzes, gan logotipi ar piesaistītu grafisku tēlu – stilizētu augstskolas ēkas veidolu. Sarunas notika konstruktīvā formā, kur pasūtītājs pauda savu redzējumu, kā būtu jāizskatās RTA logotipam, rezultātā rodas iespaids un kopējais tēls, kuru bija likumsakarīgi attēlot vizuālajā formā. Izstrādājot RTA logotipa dizaina koncepciju, tika ņemts vērā uz lietotāju orientēts dizaina princips, kura mērķis ir padarīt grafiskā produkta lietošanu vienkāršu un efektīvu, veidojot logotipu, kā produktu ar pievienoto vērtību dizainā.

Korporatīvā dizaina izstrādes laikā ir notikušas vairākās fokusgrupas diskusijas, kuras sastāvā piedalījās RA administrācija, Biznesa inkubatora un Latgales Kultūrvēstures muzeja mākslas nodaļas pārstāvji, RA studiju virziena „Mākslas” dizaina programmu direktori u.c. profesionāļi. Fokusgrupu diskusiju laikā tās dalībnieki izteica savus viedokļus par logotipu un sniedza autorei vizuālās identitātes izstrādei noderīgu informāciju. Logotipa gala variants 2015.gada decembrī bija prezentēts RA Senāta sēdē un tika sagatavots iesniegums RTA logotipa apstiprināšanai.

Mērķtiecīgā un skaidri strukturētā darba rezultātā, autores ir izstrādājušas logotipu, kā korporatīvā dizaina galaproduktu. Rēzeknes Tehnoloģiju

akadēmijas grafiskās identitātes galvenais pamatelements ir grafiskā zīme, kurā ir attēlota augstskolas galvenā ēka, stilizētā veidolā un akadēmijas pilns nosaukums. Primārais logotips ir trīskrāsu: zīme – tumši zila, balta, pelēka (sudraba), nosaukums – tumši zils, sakārtots horizontālā kompozīcijā (skat. 5.att.).



5.attēls. Rēzeknes Tehnoloģiju akadēmijas primārais logotips
 Figure 5 Primary logo of Rezekne Academy of Technologies

Viens no iedarbīgākajiem korporatīvas identitātes pamatelementiem ir burtu šrifts. Vienots šriftu lietojums visos prezentācijas materiālos ir būtisks, lai vizuālie materiāli būtu pārskatāmi un komunicētu vienotā korporatīvajā stilā. Logotipa dizaina pamatā ir galvenais teksta fonts *Gulim*, bez serifu šrifts, kurš ir pateicīgs vizuālajā komunikācijā, jo neveido papildus grafiskus elementus vizuālajā uztverē. Gadījumos, kad šrifta *Gulim* lietošana ir ierobežota, tad tas varbūt aizvietots ar izplatītu fontu *Calibri*, no kura ir pieļaujama *Light*, *Regular*, *Bold* un *Black* burtu šriftu izmantošana.

Kopā izvēlētie izteiksmes līdzekļi veido jēdzieniski piepildītu un asociatīvā līmenī izteiksmīgu logotipu, kas atbilst gan akadēmijas nākotnes vīzijai, gan piederību reģionam. Izvēlētie pamatkritēriji, izriet no uzņēmuma iekšējās dizaina stratēģijas, lai iekšējā un ārējā dizaina komunikācija būtu konkurētspējīga.

Logotipam ir horizontālā kompozīcija, kas jēdzieniski simbolizē stabilitāti, nodrošina ērtu un efektīvu logotipa lietojumu dažādās komunikāciju formās.

Vizuālās identitātes veidošanas procesā, lai panāktu pilnīgāku asociatīvo ietekmi uz uztvērēju, svarīgi ir zināt un izmantot krāsu simbolismu. Katras krāsas skaidrojums veidojies daudzu paaudžu un kultūru garumā, saplūstot apkārtējās vides vērojumiem, cilvēka emocionālo pārdzīvojumu atspoguļojumam (Daliba, 2006). Kā jau minēts iepriekš, koncepcijas idejiskais saturs pamato zilās krāsas piesaisti caur Latgales arheoloģisko tērpu, bet krāsu simbolismā tai piemīt arī sava nozīme. Simbolu teorija vēsta, ka zila kāsa simbolizē mieru, pārdomas un intelektu (Lielā simbolu enciklopēdija, 2002). I.Daliba (2006) ir apkopojusi krāsu nozīmi no vizuālās reklāmas skatu punkta, kur zilai krāsai piešķir gudrības, bezgalības, mūžības simboliku. Tā izsaka

tiekšanos pēc drošības, harmonijas, saistīta ar pašanalīzi un iedziļināšanos sevī. Konstatēts, ka zilā krāsa patīk vairākiem pieaugušo visā pasaulē. Izcilais mākslinieks V.Kandinskis atzinis, ka zilā ir pati dziļākā no krāsām. Zila krāsa ir patiess līderis logotipu dizainā, to pamato, ka tai nav asociāciju ar negatīvām emocijām. Zila krāsa simbolizē pārliecību, atzinību, lojalitāti, uzticamību un pat spēku (Символика цветов в восприятии бренда, б.г.). Zilo krāsu bieži izmanto mājas lapām, kas saistītas ar tehnoloģijām, korporācijām, rūpniecību, ūdeni (Krāsu nozīme psiholoģijā un simboli, 2015).

RTA korporatīvā dizaina izstrādē, tēla pastiprināšanai, tika izmantota pelēka – sudraba un baltā krāsa. Pelēkās krāsas pozitīvais aspekts ir reālisms, apvienošana, respektablums. Pelēkais tonis tiecas pēc stabilitātes, harmonijas un šī krāsa spēcīgi kontrolē emocijas. Sudrabaini-pelēkajai krāsai ir daudz pozitīvu aspektu, tā palīdz attīstīt radošo iztēli un aktivizē intuīciju (Daliba, 2006). Sudrabs liecina par vērtībām, zināšanām un attīstību, mūsdienu dizainā simboliski nozīmējot – stingrumu, jauninājumus, jaunās tehnoloģijas.

Baltā krāsa logotipu dizainā ir ļoti universāla un eksistē gandrīz jebkurā logotipā (Сила цвета в логотипе, б.г.). Simboliski baltā krāsa nozīme – patiesumu, tīrību, skaidrību, nevainību un pilnību, ka arī absolūtu (Brūsa-Mitforda, 1998).

Gadījumos, kad primārā logotipa lietošana ir apgrūtināta un pat neiespējama autores piedāvā RTA sekundāro logotipu (skat. 6.att.).



6.attēls. Rēzeknes Tehnoloģiju akadēmijas sekundārais logotips
Figure 6 Secondary logo of Rezekne Academy of Technologies

Līdztekus koncepcijai pētījuma autores piedāvās arī Rēzeknes Tehnoloģiju Akadēmijas zīmola vizuālos risinājumus – citas primārā logotipa versijas un sekundārā logotipa veidus, korporatīvā stila produktus, kur ir saglabāta un izkristalizēta zīmola koncepcija. Jauna logotipa lietošanas noteikumi, kā arī produktu dizains tiks konceptuāli strukturēti un atspoguļoti korporatīvā stila grāmatā.

Secinājumi Conclusions

Apkopojot visas teorētiskās pamatnostādnes par tēmu, izvērtējot pasaules tendences grafiskajā dizainā autores ir likumsakarīgi guvušas jaunas atklāsmes, kuras ir apkopotas, kā pētījuma secinājumi:

Korporatīvā identitāte neverbāli atklāj un atmiņā saglabā pirmo iespaidu par organizāciju, rada pārliecību un vērtības, veido asociācijas un sniedz sabiedrībai vēstījumu par sevi. Tas viss veido platformu, balstītu organizācijas stratēģiskajos mērķos. Organizācijas korporatīvajam dizainam ir kodolīgi jāraksturo tās darbības veids un stratēģiskā koncepcija.

Izstrādājot grafisko identitāti konkrētai augstākās izglītības iestādei, būtu jāveic kvalitatīvs pētījums, fokusējoties uz esošo platformu, proti, vēsturi, cilvēkiem, pozīciju sabiedrībā un valstī kopumā, koncentrējoties uz esošā zīmola aspektu.

Autores uzskata, ka izpētot augstskolas zīmola esamību, stratēģisku virzību un sabiedrības attieksmi pret organizāciju, var atklāt svarīgu informāciju korporatīvā dizaina izstrādei.

Svarīgs posms korporatīvā dizaina izstrādē ir esošās situācijas raksturojums: iepazīšanās ar situāciju, uzdevuma problematizācija, pretrunu atrisināšana un analīze, kā arī pasūtītāja vajadzību apzināšana un kritisks to izvērtējums. Analoģu izpēte un analīze palīdz saprast logotipa veidošanas kopsakarības, kompozīcijas uzbūvi un idejisku piesaisti.

Ļoti nozīmīgs posms logotipa izstrādes procesā ir koncepcijas pamatojums un skiču izstrāde. Korporatīvā dizaina koncepcija ietver sevī galveno ideju, kam pakārtotas visas logotipa konstruktīvās detaļas un izteiksmes līdzekļi.

Autores uzskata, ka pētījuma ietvaros panāktais rezultāts ir veiksmīgs, ir izdevies radīt unikālu logotipu, bastoties uz esošā zīmola idejiskām vērtībām, apvienojot vēsturiskās un kultūrvēsturiskās piederības, nākotnes vīziju mūsdienīgā grafiskajā zīmē. Darbs pie RTA zīmola koncepcijas līcis pievērsties fundamentāliem jautājumiem un izvērtēt Rēzeknes Tehnoloģiju akadēmiju gan vietējā, gan valsts kontekstā.

Summary

The theoretical investigation of the article contains the author's analysis of such terms as corporate design, visual identity, visual communication, corporate profile. All these terms are closely interrelated, which is proved by similar and even identical definitions in scientific sources. **The aim of the article** is to elaborate the conception of the corporate identity design of Rezekne Academy of Technologies, having investigated the corporate identity design as the organization's business card in the context of society. The article consists of an introduction, two parts and a conclusion. The introduction describes why the topic is actual, states the aim of the article and methods of investigation. In the first part of the article the

authors evaluate theoretical aspects of corporate design, which provided a scientific basis for the research and confirmed the topicality of the problem, and the second part contains the description and analysis of elaboration of the conception of corporate design of Rezekne Academy of Technologies.

The methods of research: theoretical – investigation and analysis of relevant literature, internet sources and regulatory documents. Empirical – methods of data collecting: group discussion.

Every organization has its own identity which is formed by different aspects – culture of the enterprise, attitude to customers, representation of the organization, which differs a company from others ones. The combination of all factors mentioned above reflects the individuality of the organization, its name, logo, style, etc. Visual identity allows to present, to leave a deep impression, form associations about an enterprise or institution. Corporate identity contributes to the essence of the organization which reflects in its all activities and is necessary for the enterprise's positioning in public space. The organization's identification is based on the value which is added to the design, where the corporate design performs the function of visual communication.

The conception of visual identity of Rezekne Academy of Technologies (Rezekne High School) includes constructive details of the logo which are subordinate to the main idea. Theoretical knowledge about branding and experts' answers which were analysed in the previous research were taken into consideration during the process of elaboration of the conception. As a result, the authors came to the conclusion that the conception of visual identity has an important relation to the ideas and values of RAT:

Historical building of the high school. In 1927 it was built by the architect Pauls Kundziņš's project (1888-1993) as Teachers' Institute. It was the first big building in Rezekne which was built after the Freedom fights and release of Latgale (Rezekne State Secondary School and pedagogical institute). **House, knowledge, feelings, traditions, culture and place.** Architectonic constructive lines of the main building of RAT define the compositional solution to the logo.

Eastern Latvia. *Latgale, the land of blue lakes, belonging to the region through cultural inheritance.* The logo of RAT contains nuance of blue is chosen, being inspired by archeological national costume of Latgale.

Development of technologies. The construction of letter abbreviations of RAT is derived from geometric shapes, the emphasis is on development of exact sciences.

During the analysis of the corporate identity of Rezekne Academy of Technologies it was found out that its core is based on such categories as science, technologies, regional development, history and culture, where the environment and being a part of it serves to ideological creation of visual identity.

The main element of graphic identity of Rezekne Academy of Technologies is a graphic sign where the main building of the high school is represented in a stylized form and its full name. The primary logo is in three colours: the sign – dark blue, white, grey (silver), the name – dark blue, arranged horizontally.

The authors consider that the received result in the frame of the research is successful, it has been possible to create the unique logo, being based on the ideological values of the existing brand, having unified historical and cultural belonging and the vision of the future in contemporary graphic sign. The work on the conception of the brand of RAT has forced to turn to the fundamental questions and evaluate Rezekne Academy of Technologies in the local and national context.

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IDENTITY OF KĀRLIS RŪDOLFS KREICBERGS IN HIS LIFE

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Abstract. *The aim of the paper is to analyse the identity of Latvian pedagogue and conductor Kārlis Rūdolfs Kreicbergs (1921-2014), by using the author's elaborated theoretical model of identity research (2016), and the integrated author's approbated personality research model (2013). The personality research model, which, in its micro context, includes basic features of his personality - emotions, talent, behaviour and convictions, as well as adaptation characteristics - interests, motivations, values, attitudes, is supplemented with components determining the identity of the pedagogue: in mezzo context in the social environment, where the identity of the pedagogue, as well as family, identity in his everyday life, student's and religious identity is formed, but in micro context, - professional, national, local, political and cultural identity of the personality, thus creating a research model of the multidimensional identity of the teacher and factors influencing development thereof. After the approbated model with the help of qualitative research methods the obtained data are related to theoretical opinions about the identity formation of the pedagogue, thus approving the innovative character of the proposed theoretical model.*

Keywords: *identity research model, biographical approach, case study, components of the identity, identity of a pedagogue.*

Introduction

The subheading *Biographical insights about the excellent cultural and educational professional – conductor, teacher (Biogrāfiska apcere par izcilu kultūras un izglītības darbinieku – diriģentu, skolotāju)* of the author's monograph *Kārlis Rūdolfs Kreicbergs and his Life (Kārlis Rūdolfs Kreicbergs un viņa laiks)* (Medveckis, 2012) includes a statement, which relates to the important questions of the identity. The author, having continuous contact with the person to whom the monograph is dedicated as well as with the people, with whom K.R. Kreicbergs had the tightest relations during his life does not have any doubts regarding the title of the subheading. In the entries included into the *Liepāja University (Latvia) Staff Bibliographical Index* (Medveckis, 2007), according to formal criteria an approval is obtained for the professional field, but without answers about the work quality. An insight about his view on personal life is obtained from the life story of Kārlis Rūdolfs Kreicbergs (Medveckis, 2004:45-63). His view is a self-reflection and a construct of his own identity (Abrams, 2010).

Not all the persons - family members of K. R. Kreicbergs, his students, choir members, colleagues -, who described K. R. Kreicbergs, had the same opinion. This created research interest to find approval or to put into question the fairness of the subheading. Biographical research approach (Tompson, 2000; Bela, 2004) is useful for this, as well as the author's elaborated and approbated *Theoretical Model of Teachers Identity Research* (Medveckis, 2016).

The biographical research approach is used for studying the stage of the pedagogue's identity formation and self-awareness (Knowles, 1992). The main idea of pedagogue's personality is found in the research of Evija Strika (Strika, 2009), and the identity concept comes originally from the theoretical identity concepts of Danish lifelong-education problem researcher Knud Illeris (Illeris, 2014).

The elaborated *Theoretical Model of Teachers Identity Research* is approbated in the practical research. More information about it can be found in the author's publication (Medveckis, 2015), which was published after IJAS conferences in Prague (2014), Freiburg (2014), but the results of the practical research of the *Theoretical Research Model of Pedagogue's Identity and its Influential Factors* have been published for the first time.

Theoretical justification

Personality reflection in relation to cognitions of childhood selfness is analysed in the works of Imants Plotnieks, doctor of Psychology, approving that sense of well-being is an important factor of personal identity formation (Plotnieks, 1998:11). Kristīne Mārtinsone emphasizes the importance of adequate self-assessment in the process of identity study (Mārtinsone, 1998), selfness in the narrative form at the moment of his life-retelling. Interwoven search for new identities is a proper feature of life-stories, which originates from the author's experience in empirical work, where deeper theoretical statements of identity formation are found in the works of British Sociology Professor Richard Jenkins (Jenkins, 2008), however, during life changes in apprehension of selfness are possible, and stability of the identity is not an exclusion as well. Special attention to variety of research and interpretation of selfness and identity transformation processes was given by the Danish lifelong-education problem researcher Knud Illeris, admitting that identity study and self-understanding are not programmed as permanent for all the times (Illeris, 2014).

A sociologist Dagmara Beitnere, describing self-references in the narrative form, refers to opinions of a German sociologist Niklas Luhmann (Luhmann, 1999), linking those to the identity and finds out that according to the system theory self-reference is more important than identity, because identity changes when self-reference changes (Beitnere, 2003.)

The concept of Knud Illeris includes also the idea of the identity core, which forms the main identity, which is included in the three concentric layers of the main identity, which altogether form the primary or general structure of the identity - *personality layer*. According to Illeris, personality layer is more flexible, that is more susceptible in relation to changes, acquiring new impressions, facing new circumstances (Illeris, 2014). The author, outlining a *preference layer*, interprets it as a changeable element of identity, which refers to *everyday identity*, but links *incomplete or partial identity* to one or two main fields that can generally be called as relations and our practices, which at the same time show that such incomplete (partial) identities can be connected to each other in different types, in different cultures, different traditions and norms and serve for different groups of people (Illeris, 2014:74-75).

If the previously mentioned identity parts relate to identity as a whole, what is respected by holistic theory representatives, as, for instance, Daina Lieģeniece (Lieģeniece, 1992, 2002, 1999, 1996, 2013), then there is also a cross-sectional structure, which includes various fields of identity or incomplete (partial) identities. Altogether these incomplete (partial) identities are connected and touch upon three main fields: *working identity, family identity and everyday identity or interest identity*, however, these, taking into account interconnections with the relations, can be divided into three categories, which Illeris called as national cultural identity, religious identity and political identity (Illeris, 2014:75).

Illeris emphasizes that some incomplete (partial) identities, especially in connection with the main identity, are usually tightly connected with the central main identity, and at the same time each one has his own core.

In the author's research MODEL OF TEACHERS' IDENTITY FACTORS IN THE BIOGRAPHICAL RESEARCH, which is published in International Journal of Multidisciplinary (Medveckis, 2015), it is concluded that the most important personality features of the teacher in the field of humanities, which is represented also by Kārlis Rūdolfs Kreicbergs, is the identity, which determined the further research outlines. The model of factors influencing teacher's personality is theoretically grounded and approbated in practical researches, where the next approbation stage is linked with approbation of the *Theoretical Research Model of Teachers Identity and Factors Influencing Development thereof*.

Methodology

The full research cycle involves modelling of scientific researches in the field of philosophy, sociology, anthropology, semiotics, pedagogy, psychology, history, cultural studies, which include also study and analysis of historical,

biographical sources within the supported theories. In the further course of the research **methods of empirical data acquisition** are used: surveys, interviews, focus groups discussions, gathering of biographical and historical data, generalisation, and systematisation. **For data processing** interview transcribing, coding, content analysis, historically-logical analysis, the descriptive method is used. In the 3rd stage of the research 64 respondents were involved, to whom respondent codes were assigned within the research.

Table 1 Code system for determination of K. R. Kreicbergs identity and factors influencing development thereof in the life activity of the pedagogue

profile codes	respondent codes	contents (conceptual) codes	
		multiple codes	meta codes
/krcb_str_int_klg	\$vikmanis_v	ident_uzsk	pers_asp
	\$racevskis_e	ident_uzv	
	\$kronbergs_v	ident_emoc	
	\$paipare_m	ident_tal	
	\$blauzde_o	ident_int	
	\$valce_i	ident_rakst	
	\$medveckis_a	ident_vert	
/krcb_dz_str_int_gm	\$sieva	ident_mot	soc_asp
	\$masa	ident_att	
	\$meita	ident_ped	
	\$dels	ident_stud	
	\$vedekla	ident_gim	
	\$mazdels	ident_relig	
/krbg_fkg_dsk_kr	\$rijnieks_o	ident_ikd	kult_vest_asp
	\$valters_a	ident_prof	
	\$kirsteins_j	ident_kult	
	\$bercis_g	ident_polit	
/krcb_dl_str_int_audz	\$ivanova_a	ident_nac	iaif
	\$piraga_m	ident_viet	
	\$smiltiece_g	iaif_izv	
	\$dambe_l	iaif_ldzd	
	\$ziemele-kluce_i	iaif_atz	
	\$balode_i	iaif_dros	
	\$amerika_ansina_l	iai_uzt	
/krcb_gd	gd_1-40	iaif_jb	

According to the strategy of the research, using the theoretical statements as a basis, a code system was elaborated, which is formed by respondents' codes, profile codes, content (conceptual) codes (multiple codes and meta-codes) (see Table 1).

To be able to compare opinions of various respondent groups about the identity of K. R. Kreicbergs and the factors of development thereof within the

socialisation process, as well as to determine the differences between various groups, profile codes were created, grouping the respondents according to the chosen primary data acquisition method: case analysis (/krcb_gd), focus group discussion (/krcb_fkg_dsk_kr), structured interviews (/krcb_str_int_klg), partially structured interviews (/krcb_dl_str_int_audz_st) and deep structured interviews (/krcb_dz_stra_int_gm), thus providing triangulation. Using structured interviews, 7 colleagues of K. R. Kreicbergs were interviewed; using partially structured interviews - 7 pupils and students; using deep structured ones – 6 family members, in the focal group discussions 4 choir members took part; using case analysis, 40 cases of K. R. Kreicbergs self-reflection about the identity were analysed.

In the meta code denoting the personality aspect of the identity „pers_asp” such multiple codes are included as emotional code „ident_emoc”, behaviour code „ident_uzv”, conviction code „ident_uzsk”, talent code „ident_tal”, interests code „ident_int”, character code „ident_rakst”, value code „ident_vert”, attitude code „ident_att” and motivation code „ident_mot”.

In the meta code denoting the social aspect of the identity „soc_asp” such multiple codes are included as pedagogue's identity code „ident_ped”, student's identity code „ident_stud”, family identity code „ident_gim”, religious identity code „ident_relig” and everyday identity code „ident_ikd”.

In the meta code denoting the cultural and historical aspect of the identity „kult_vest_asp” such multiple codes are included as professional identity code „ident_prof”, national identity code „ident_nac”, location identity code „ident_viet”, political identity code „ident_polit” and cultural identity code „ident_kult”.

In the meta code denoting the factors influencing development of the identity „iaif” such multiple codes are included as choice code „iaif_izv”, participation code „iaif_ldzd”, recognition code „iaif_atz”, safety code „iaif_dros”, trust code „iaif_uzt” and moral obligation code „iaif_jb”.

For identification of environment categories such multiple codes were created as work environment code „darb_vidē”, study environment code „stud_vidē”, family environment code „gim_vidē”, community environment code „kop_vidē” and everyday environment code „ikd_vidē”, which are united into the meta code denoting micro context „mezo_kont”, as well as the educational environment code „izgl_vidē”, ethnical environment code „etn_vidē”, geographical environment code „geogr_vidē”, political environment code „polit_vidē” and cultural environment code „kult_vidē”, which are united into the meta code denoting macro context „makro_kont”.

In the meta code denoting the factors influencing development of the identity „iaif” such multiple codes are included as choice code „iaif_izv”,

participation code „iaif_lidzd”, recognition code „iaif_atz”, safety code „iaif_dros”, trust code „iai_uzt” and moral obligation code „iaif_jb”.

In the software environment for qualitative data processing „AQUAD” frequency tables are created for determining frequencies of codes denoting pedagogue's personal and professional competencies, linkages between the identity and environment as well as identified pedagogue's identity formation condition conformities (*implicants*).

For provision of maximal fairness and reliability as well as for generalisation a mixed approach of data processing methods is used - parallel to qualitative methods in the AQUAD software environment quantitative data processing methods are used in SPSS software environment, in order to make sure whether the secondary data acquired with the qualitative methods correspond to and are not contrary to the data acquired by the quantitative methods.

In the SPSS environment data processing involves use of Chi-Square test for determination of differences between the identity as a personality category and the groups of respondents as well as for cluster analysis for identification of respondent groups. As the empirical distribution does not correspond to normal distribution ($p=0.000$), non-parametric methods are used - Kendall's tau-b correlation analysis to determine relations (correlations) between categories and Kruskal-Walis H test to determine differences among 3 independent groups of respondents.

Results of the research

Complete research of the identity is possible if all the components in each personality are fully counted, which create the holistic model, where personality, social and cultural-historical aspects are included. Understanding of the personality aspect is found in the approach based on the personality theory, stating that personality has both subsistent and acquired qualities and the feature characterising the identity – the ability to reflect about oneself and qualities. The social aspect is connected with the relationships among individuals in the society, social groups, and also with the socialisation process in the widest sense that can be analysed retrospectively and in the closest perspective in respect of what happens during communication, for example, retelling life-stories. The cultural and historical aspect includes material and intellectual cultural components, which were created as the result of human activities, as well as attitude of people to each other regarding created values, spiritual world, the environment, which could also be created not by human activities, for example, the nature, landscapes.

Table 2 Table of frequencies for determining the frequency of contents (conceptual) codes denoting identity criteria of the personality aspect

	A	B	C	D	E	
ident_att		3	0	0	3	0
ident_emoc		0	0	0	3	0
ident_int		0	0	1	1	0
ident_rakst		0	0	0	1	0
ident_uzv		0	0	1	1	0
ident_vert		0	0	0	9	0
<hr/>						
ident_gim		0	0	3	3	0
ident_ikd		0	0	0	1	0
ident_ped		0	3	0	3	5
ident_relig		0	0	0	1	0
ident_stud		0	0	0	1	0
<hr/>						
ident_kult		1	0	0	2	0
ident_nac		0	0	0	2	2
ident_polit		0	0	0	3	0
ident_prof		0	4	1	5	0
ident_viet		0	0	0	1	0

A: /krbg_fkg_dsk_kr
 B: /krcb_dl_str_int_audz/st
 C: /krcb_dz_str_int_gm
 D: /krcb_gd
 E: /krcb_str_int_klg
 Table analysis (Project: kreicbergs) Frequencies

Distribution of mentioned frequencies of various identities by choir members, students/pupils, family members, K. R. Kreicbergs himself and colleagues of K. R. Kreicbergs in relation to the personality, social, cultural and historical aspect provided in the table of meta code frequencies denoting identity aspects testifies that personality aspects of the identity dominate in the statements of K. R. Kreicbergs and choir members; in the opinion of family members he had social aspect of the identity, but colleagues and students outlined the cultural and historical aspect of the identity (see Table 2).

Data of contents analysis testify that respondents mostly identify K. R. Kreicbergs with attitudes, then with interests and to the same extent with behaviour. Contextually there are no contradictions that respondents identify the title person of the monograph K. R. Kreicbergs with values, though it comes out from the values reflected in the K. R. Kreicbergs's self-awareness, which he prioritizes. In the hierarchy of K. R. Kreicbergs's values, the duty is dominant. He critically assesses the popular discourse among the contemporary young people, where morale of rights dominates at the foreground. Different opinions can be explained mostly by upbringing and education in the family and at

school. Kreicbergs believes that the duty of pupils is to study and the duty of teacher is to bring up and educate. Beside this it is necessary to mention such values as awareness of the fatherland, spirituality, and they are to be inculcated from the birth to feel the mutual humane sincerity, sensitivity, love, trust and fairness.

The social aspect of the identity in its variety opens in the pedagogue and conductor's story about life space, which is childhood, where child's eyes noticed all the daily steps of parents, as well as school time, where self-awareness became more stable and it became clear what means „We” and „Others”. „We” - that is a family, kin, with a certain economic base, so that parents could educate their children, cultivate their fields, live in the large and newly built house. Whereas „Others” in the opinion of a young human, are all those, who in some sense are different from what is seen in the father or relatives' house, who have not had an opportunity or a wish to study; those others are also those, who were in the same community among his mother's relatives, in the church, in the traditionally held events, among neighbours and contemporaries at school. Impressions of childhood and teen-age years appear also in the cognitions accumulated during the next years of life and also affect the process of value crystallisation.

The identity in cultural and historical aspect dominates in narrations of colleagues and pupils/students, and also it is identified in Kreicbergs's expressions. In the self-reflection of K. R. Kreicbergs, which describes the self-dimension of the personality, it is an important component of self-identity. In Kreicbergs's narration there are not any foreign expressions, which testify self-belonging to „cultural nation”, „intelligence”, „educated layer”, „handled musicality” The same was also marked by colleagues, when describing K. R. Kreicbergs as the conductor of the certain cultural generation period with distinct awareness of responsibility, determinate position and clearly formulated attitude to cultural values, which can be subjective (E. Račevskis, I. Valce, V. Vikmanis, V. Kronbergs). During interviews seemingly little attention to the cultural and historical aspects of the identity was paid by those choir members, which do not approve the absence of cultural and historical components typical to K. R. Kreicbergs's identity. However, the socialisation and self-expression aspects of choir members and the importance of recognition and participation are dominant. The mediate contextual conception is influenced by the presence of cultural and historical aspects.

Table 3 Table of content (conceptual) code frequencies denoting factors influencing development of identity

	A	B	C	D	E
iaif_atz	0	0	2	11	5
iaif_izv	0	0	0	13	0
iaif_ldzd	1	6	1	1	0
iaif_uzt	3	1	0	1	0
iaif_dros	0	0	3	0	0
iaif_jb	0	0	0	14	2
A: /krbg_fkg_dsk_kr					
B: /krcb_dl_str_int_audz_st					
C: /krcb_dz_str_int_gm					
D: /krcb_gd					
E: /krcb_str_int_klg					
Table analysis (Project: kreicbergs) Frequencies					

Different groups of respondents have pointed out various factors, which influence identity development. These are trust for members of the choir, participation for students, safety for family members, ought-being (i.e., moral obligation) for K. R. Kreicbergs, recognition for colleagues, but such factors as recognition, ought-being and choice are among the most often mentioned (see Table 3).

Table 4 Statistical importance of differences when identifying identities in various respondent groups

Categories of identity	Chi-Square test results	Kruskal - Wallis H-test results	The highest value	The lowest value
attitude	$\chi^2(2)=22.510$	p=0.000	choir members (<i>Mean Rank</i> =11.50)	colleagues, pupils, students, family members (<i>Mean Rank</i> =35.50)
pedagogue's	$\chi^2(2)=22.423$	p=0.000	colleagues (<i>Mean Rank</i> =15.14)	choir members, family members (<i>Mean Rank</i> =38.00)
family	$\chi^2(2)=13.760$	p=0.009	family members (<i>Mean Rank</i> =19.50)	pupils, students, choir members, colleagues (<i>Mean Rank</i> =35.50)
professional	$\chi^2(2)=11.491$	p=0.023	pupils and students (<i>Mean Rank</i> =19.21)	choir members, colleagues (<i>Mean Rank</i> =37.50)

The results of Kruskal-Wallis H-test for quantitative data processing in the SPSS software environment testify that there are statistically maximally important differences among respondent status and such identity categories as attitude and pedagogue's identity: the attitude was more frequently identified by choir members, in comparison to colleagues, family members, pupils and students, who did not mention that, but the pedagogue's identity - by colleagues, in comparison to choir members and family members, who did not mention that. Statistically very important difference is discovered among respondent status and the family identity - this was more frequently identified by family members, in comparison to choir members, colleagues, students and pupils, who did not mention that. Statistically important difference is discovered among respondent status and the professional identity - this was more frequently identified by pupils and students, in comparison to choir members and colleagues who did not mention that (see Table 4).

Table 5 Statistical importance of differences when identifying factors influencing development of identities in various respondent groups

Factors	Chi-Square tests results	Kruskal - Wallis H-test results	The highest value	The lowest value
trust	$\chi^2(2)=27.708$	p=0.000	choir members (Mean Rank=11.00)	colleagues (Mean Rank=35.00)
participation	$\chi^2(2)=35.179$	p=0.000	pupils (Mean Rank=9.57)	colleagues (Mean Rank=37.00)
safety	$\chi^2(2)=29.951$	p=0.000	family members (Mean Rank=18.00)	pupils, students, choir members, family members (Mean Rank=34.00)
recognition	$\chi^2(2)=10.716$	p=0.030	colleagues (Mean Rank=18.64)	choir members (Mean Rank=41.50)
moral obligation	$\chi^2(2)=7.725$	p=0.049	K.R.Kreicbergs (Mean Rank=29.30)	colleagues, pupils, students, family members (Mean Rank=40.50)
choice	$\chi^2(2)=9.635$	p=0.047	K.R.Kreicbergs (Mean Rank=28.60)	pupils, students, choir members, family members (Mean Rank=39.00)

The results of Kruskal-Wallis H-test for quantitative data processing in the SPSS software environment testify that there are statistically maximally

important differences among respondent status and participation, trust and safety: participation was more frequently identified by pupils and students, in comparison to colleagues; trust - by choir members, in comparison to colleagues, but safety – by family members, in comparison to the other respondent groups. Statistically important differences are discovered among respondent status and recognition, moral obligation and choice: recognition was more frequently identified by colleagues, in comparison to choir members, but moral obligation and choice were more frequently mentioned by K. R. Kreicbergs himself, in comparison to the other respondent groups (see Table 5).

In the environment of AQUAD software for qualitative data processing combinations of identity condition implicants are identified:

- in the personality aspect this is influenced by moral obligation in the micro context (1 case);
- in the social aspect - trust and safety in mezzo context (1 case);
- in the cultural and historical aspect - participation and recognition in macro context (1 case).

The qualitative data analysis results obtained in the AQUAD software environment approved the results of quantitative data analysis in the SPSS software environment - in the cluster analysis such case groups are defined:

- identity in the personality aspect is influenced by moral obligation and choice in micro context;
- identity in the social aspect is influenced by trust and safety in mezzo context;
- identity in the cultural and historical aspect is influenced by participation and recognition in macro context.

During the research it is obtained how creation of identity is influenced by the environment across the full variety spectrum and complexity, starting from micro and finishing with macro contexts in family and at work, and also in socialisation process touching various social groups.

Conclusions

The results obtained in the practical research correspond to the theoretical statements, which originally come from the holistic nature of the personality self-identity and social identities in the conceptual statements.

The approbated *Model of Teachers Identity and Factors Influencing Development thereof* is a successful tool for determination of factors influencing development of personality and pedagogue's identities, which reveals an opportunity of wide application in other researches.

Looking from the theoretical perspective of the identity, in the subheading of the monograph: „Biographical insights about the excellent cultural and educational professional - conductor, teacher” there is a meaning of the statement included and also the question of the research has been approved, that is testified by the results of the research:

- Pedagogue's professional identities, as well as identification with values are dominant for K. R. Kreicbergs.
- Recognition, moral obligation and choice are the most important factors influencing development of K. R. Kreicbergs's identity.
- Identification of K. R. Kreicbergs with values, interests, emotions, talent, behaviour, convictions, character, attitude and motivation is influenced by moral obligation and choice.
- Formation of the pedagogue, student, family, everyday life and religious identity in K. R. Kreicbergs's life is influenced by trust and safety in the work, study, family and everyday life, and community environment, but formation of professional, national, political, local and cultural identity is influenced by participation and recognition in the educational, ethnic, political, geographical and cultural environment.
- The linkages discovered between identity and the environment testify that the work environment is determinative for development of pedagogue's identity, and also the family environment – for family identity, the study environment – for student identity, the everyday environment – for everyday identity and the community environment – for religious identity, the political environment – for political identity, the ethnical environment – for ethnical identity, the geographical environment – for local identity and the cultural environment – for cultural identity development.

The case study process and the obtained results can be generalised in the local period in the historical, cultural and educational space. Further wider approbation of the research model of factors influencing pedagogue's identity and development thereof in the other cultural space and environment could allow discussions about the universal nature of the theoretical model.

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DEJAS DRAMATURĢIJAS LIKUMI UN TO LIETOJUMS KOMPOZĪCIJAS APGUVES PROCESĀ

Principles of Dramaturgy of Dance and Their Usage in the Process of Studying Composition

Rita Spalva

Rīgas Pedagoģijas un izglītības vadības akadēmija, Latvija

Abstract. *Contemporary scholars are increasingly turning to dramaturgy of dance since it is a fairly recent phenomenon in development of dance in the age of poststructuralism. In light of this there are masterclasses forums and other forms of group work abounding. These lead the way in the debate concerning the role of director in the artistic process as well as regarding the new forms of cooperation in the context of contemporary choreography. With that in mind, analysis in the history of dance, suggests that questions concerning dramaturgy of dance has been a core issue for choreographers since early days of ballet. Significance of the article lies in the analysis of the classic laws of dramaturgy of dance and their usage in the process of studying the composition of dance. The subject is seen through the work of Andre Lepecki, Rotislav Zaharov, Igor Smirnov, Jacqueline Smith –Autard and other. The goal of the article is to analyze principles of the dramaturgy of dance in the context of Russian school of dance and to investigate their efficiency in the process of studying composition. The subject of research are the principles of dramaturgy of dance. The methods used in the research – analysis of scientific literature, theory of dance and pedagogical experience.*

Keywords: *dramaturgy of dance, ballet, composition of dance, pedagogical process.*

Ievads

Introduction

Mūsdienu Eiropas kultūras pieredzē jau no pagājušā gada 70.-tajiem gadiem dejas pētnieki arvien aktīvāk sāk pievērsties dejas dramaturģijas jautājumiem, uzskatot to par jaunu fenomenu mūsdienu dejas attīstībā poststrukturālisma laikmetā. Tiek rīkotas meistarklases, forumi u.c. grupu darba formas, lai spriestu par horeogrāfa un dramaturga vietu mākslas procesā, par jauniem sadarbības veidiem mūsdienu horeogrāfiskā vēstījuma kontekstā (Lepecki, 2015). Pētnieku interešu lokā ir ķermeņa potenci izpēte, saistot kustības atmiņu ar tēla psiholoģisko risinājumu vai analizējot somatisko zināšanu un priekšnesuma mijiedarbību kā difūzu procesu, saistītu ar dejotāja un horeogrāfa psihisko darbību. Tiek izvēsta diskusija par dramaturga iekļaušanos radošajā procesā un iespējamiem mākslinieciskiem ieguvumiem no tā. Taču dejas dramaturģijas jautājumi vēl 20. gadsimta pirmajā pusē tika aktīvi

risināti krievu baleta zinātnieku vidū. Tādu ievērojamu dejas praktiķu un pētnieku kā Rostislavs Zaharovs (*Захаров*), Igors Smirnovs (*Смирнов*), Rustiks atziņas šodien ne tikai nav zaudējušas savu aktualitāti, bet arī tiek aktīvi izmantotas tādu pasaulē atzītu horeogrāfu daiļardē kā Boriss Eifmanis (*Эйфман*), Leonīds Jākobsons (*Якобсон*) u.c. Raksta aktualitāti nosaka krievu deju skolas dramaturģijas likumu izziņāšana un to izmantošanas dejas kompozīcijas apguves procesā. Izvēlēta tēma ir aktualizēta Andre Lepecka (*Лепеcki*), Fjodora Lopuhova (*Лопухов*), Rostislava Zaharova (*Захаров*), Igora Smirnova (*Смирнов*), Jurija Sloņimska (*Слонимский*), Žaklīnas Smitas-Autardes (*Smith-Autard*) u.c. dejas pētnieku atziņās. Raksta mērķis- analizēt dejas dramaturģijas likumus krievu dejas skolas pieredzes kontekstā un konstatēt to darbības efektivitāti dejas kompozīcijas apguves procesā. Pētījuma priekšmets- krievu deju skolas dramaturģijas likumi. Pētījuma metodes – zinātniskās literatūras un dejas teorijas analīze, pedagoģiskās pieredzes analīze.

Termina *dejas un baleta dramaturģija* etimoloģija *Etymology of terms 'dramaturgy of dance and ballet'*

Vārds *dramaturģija* ir cēlis no sengrieķu *drāma*, kas nozīmē darbību (*Смирнов, 1986, 59*). Mūsdienās tā ir mācība par galvenajiem teātra mākslas elementiem un to skatuves izvietojumu. Jēdzienu *dramaturģija* 18.gadsimta otrajā pusē Eiropas kultūrā ievieš viens no izcilākajiem Apgaismības laikmeta pārstāvjiem - vācu rakstnieks, filozofs un kritiķis Gotholds Efraims Lesings (1729-1781) teorētiskajā darbā *Hamburgas dramaturģija* (*Hamburg Dramaturgy*), spriežot par skatuves darbības elementiem teātrī. Ar to arī tika uzsākta *vācu teātra teorijas un prakses tradīcija* (*Pavis, 1998, 122*).

Cits nozīmīgs dramaturģijas izpratnes avots Rietumu kultūrā ir Aristoteļa darbs *Poētika* (uzrakstīts ap 335. gadu p.m.ē.). Aristotelis, analizējot traģēdijas uzbūvi, kā arī attiecības starp skatuves darbību un raksturiem, nonāk pie atziņas par traģēdijas dramatisko dabu, katarses nozīmi traģēdiju uzvedumos u.c. arī mūsdienās svarīgiem skatuves mākslas atklājumiem. Aristoteļa skatījumā visiem mākslas veidiem piemīt *mimēze*, un poētika ir tās raksturotājs. Poētika nav reducējuma uz kaut ko atsevišķu, bet gan norāda jēgas un izteiksmes savienību. Lai saglabātu skatuves darbības jēgu, Aristotelis norāda, ka: *..daļām jābūt savienotām noteiktā kārtībā* (*Aristotelis, 1959, 52*). Analizējot traģēdijas uzbūvi, Aristotelis izvirza domu par fabulas iekšējo vienotību, kur *visām notikumu daļām jābūt sakausētām tā, ka, kādu pārstatot vai atmetot, mainītos un arī izirtu viss* (*Aristotelis, 1959, 55*). Tātad mākslas darba veselumu nodrošina darbības vienotība un uzbūves loģika. *Poētikas* 10. nodaļā Aristotelis konstatē kompozīcijas nozīmi mākslas darba tapšanā: *Kompozīcija ir tā, kas padara darbību saprotamu* (*Aristotelis, 1959, 60*). Vienota, loģiski izveidota

kompozīcija ietver sevī tādus elementus kā *harmonija, kārtība, proporcijas, simetrija, līdzsvars, ritms, nobeigtība* veido klasiskās kompozīcijas koncepciju. Viens no svarīgākajiem skatuves darbības atklājumiem Aristoteļa *Poētikā* nosaka, ka veselumu mākslā nodrošina kompozīcijas elementu vienotība, - atziņa, kura nākotnē kļūst par dramaturģijas kā skatuves mācības pamatu.

Kā mākslinieciskās darbības suverēns veids dejas un balets ir nostiprinājušies līdz ar pirmo patstāvīgo izrādi 1581. gadā, kad karalienes Katrīnas Mediči galmā Luvrā tika izrādīts *Karalienes komiskais balets (Ballet Comique de la Royne)* par godu karalienes māsas precībām. Baleta sīks apraksts ir saglabājies Katrīnas Mediči personīgajos pierakstos, kur viņa šo galma baletu nosauc par mākslas un spēka (*art and power*) sajaukumu. (Lee, 2002, 45). Šī galma baleta kvalitāte tika atzīta visā Eiropā, tas vairākkārt ticis iestudēts vai imitēts dažādos galmos. Pēc šīs izrādes Francija kļūst par Eiropas baleta mākslas centru, mode uz baletiem izplatās visā Eiropā, veicinot dejas mācību iestāžu dibināšanu Eiropā un līdz ar to dejas profesionalizāciju (Spalva, 2013). Taču 16.-17.gadsimta dejas teorētiķus, aprakstot krāšņās galma izrādes vai atsevišķu deju soļus, interesē galvenokārt deju zīmējumi un tehnika.

Tikai 18. gadsimtā dejas reformators Žans Žoržs Novērs (*Noverre, 1727-1810*) formulē dejas estētikas doktrīnu teorētiskajā darbā *Vēstules par deju un baletiem (Letters on Dancing and Ballets)*, kurā konstatē, ka balets kļūst par patstāvīgu mākslas veidu ar izveidotu dramaturģiju, loģisku sižeta attīstību un tēlu sistēmu. Ž.Ž. Novērs skaidri parādīja, balstoties uz dažādu iestudējumu analīzi, ka sižets, darbība un tēlu sistēma – tās ir pamatvērtības, uz kuriem balstās baleta dramaturģija (Noverre, 2004). Ž.Ž. Novērs veido baletmeistara darba koncepciju – tā ir radoša profesija, kura aicina vērot dzīvi, iepazīt mākslas būtību un tēlaini domāt. Baletmeistars ir ne tikai kustību partitūras veidotājs, - viņš ir arī idejas autors un tās īstenotājs. Tādā veidā baleta un dejas dramaturģiskā puse kļūst par baletmeistara profesijas neatņemamu sastāvdaļu.

No Ž.Ž. Novēra laikiem līdz mūsdienām balets un dejas ir kļuvuši par mākslas veidiem, kur vienotā darbībā apvienojas horeogrāfija, mūzika, tērpi, skatuves noformējums un izpildījums. Šajā savienībā galvenie elementi ir kustība un mūzika, kuri apvienojas nevis unisonā, bet veido savdabīgu kontrapunktu. Katras dejas vai baleta pamatā ir trīs galvenās komponentes - horeogrāfija, mūzika un darbība.

Krievu klasiskās dejas skola, stabilizējoties 19.gadsimta pirmajā pusē, apvienoja dejas tehnikā itāļu virtuoziāti ar franču grāciju, balstās Ž.Ž. Novēra atziņās un veido savu, atšķirīgu pieeju ne tikai izpildījumā, bet arī skatuves darbības tradīcijās. Muzikologs J.Sloņimskis, analizējot 19.gadsimta krievu skolas horeogrāfu Šarla Didlo (*Didlot*) un Mariusa Petipā (*Petipa*) darbību, atzīst, ka, jau vēsturiski dejas dramaturģijai piemīt vairāku slāņu struktūra – no vienas puses tā atbilst vispārīgām skatuves darbības prasībām, kad ir notikuma

sākums, attīstība un kulminācija, - no otras puses tā ir dejas iekšējā attīstība, un kā trešo komponenti J.Sloņimskis nosauc tēlu sistēmas attīstību- konflikti, sadursmes u.c. tēlu plastiskās intonācijas (Слонимский, 1977). Pēc J.Sloņimska atziņām baleta teātris jau 19.gadsimtā, iedvesmojoties no baleta teātra reformatoru atklājumiem, operē ar dejas dramaturģijas struktūru:

1. Darbības sižetiskā attīstība.
2. Dejas plastisko motīvu attīstība.
3. Plastisko intonāciju mijattiecības un attīstība.

Dejas dramaturģija un kompozīcija *Dramaturgy of dance and composition*

Dejas dramaturģijas struktūru vienotā veselumā apvieno kompozīcijas likumi un to ievērošana. Krievu baletmeistars Igors Smirnovs teorētiskajā darbā *Baletmeistara māksla (Искусство балетмейстера)* norāda uz nepieciešamību veidot kompozīcijas plānu, lai veiksmīgi apvienotu visus dramaturģijas struktūrkomponentus ar skaidri saprotamu ideju, izstrādātu tēmu, pārliecinošu tēlu sistēmu. I.Smironovs parāda, ka dejas kompozīcija jāveido pēc pieņemtajiem skatuves mākslas dramaturģiskās darbības principiem: kompozīcijā ir jāizdala *ievads, ekspozīcija, attīstība, kulminācijas pakāpes, kulminācija, atrisinājums*.

1. *Ievads* – dejas uznāciens un sākums. Nelielās kompozīcijās tas var būt ļoti īss un saplūst ar nākamo dramaturģiskās darbības sadaļu.

2. *Ekspozīcija* iepazīstina ar darbību, tiek ieskicēti tēli, veidoti pamatmotīvi. Ekspozīcijas garums ir atkarīgs no interpretācijas un darbības kopgaruma. Ekspozīcijas attīstību nosaka kompozīcijas raksturs.

3. *Attīstība* – veidojas notikumi, iezīmējas konflikti, horeogrāfiskie motīvi pāraug darbības epizodēs.

4. *Pakāpes pirms kulminācijas* (mazās kulminācijas) – konflikts iegūst kāpinājumu. Pārejas no vienas pakāpes uz otru piešķir darbībai dinamiku un ved to uz kulmināciju.







5. *Kulminācija* – kompozīcijas augstākais punkts. Tai raksturīgs sižeta vai darbības emocionālais spriegums, kas izpaužas kompozīcijas elementu piesātinājumā.

6. *Atrisinājums* –nobeigums, kurš atrisina ieceri. Dejas kompozīcijā, lai panāktu lielāku emocionālo iespaidu, reizēm kulminācija un atrisinājums tiek sapludināti kopā.

Dejas kompozīcijā dramaturģija veicina darbības loģisku attīstību un tās dinamiku. Tie samēro daļu garumu, nodrošina darbības atbilstību veselumam – iecerei (Смирнов, 1986, 62 – 65).

Tomēr kopumā dejas dramaturģija ar kompozīcijas starpniecību nodrošina darbības attīstību. Darbības attīstība var būt dažāda, - ar lielām vai mazām

kulminācijām, ar strauju vai lēnu attīstību (skat. 1.att.). To nosaka katras kompozīcijas iecere, stils un saturs.

1. 	Horeogrāfiskā darbība norisinās vienmērīgi bez kontrastiem un attīstības
2. 	Horeogrāfiskā darbība tiek pārtraukta ar statisku darbību
3. 	Horeogrāfiskā darbība attīstās un virzās uz kulmināciju
4. 	Horeogrāfiskā darbība attīstās ar gājienu uz kulmināciju un nobeidzas ar "izdzišanu"
5. 	Horeogrāfiskā darbība attīstās un beidzas ar kulmināciju
6. 	Horeogrāfiskā darbība sākas ar kulmināciju un nobeidzas ar "izdzišanu"

1.attēls. Horeogrāfiskās darbības attīstība
Figure 1 Development of choreographic activity

Horeogrāfs un teorētiķis Radiks Zaripovs (*Зарипов*) analizē dziļāk dejas dramaturģijas struktūru un nonāk pie atziņas, ka savienība *iecere-stils-sižets* nosaka tālāko darbu pie iestudējuma - kompozīcijas paņēmieni izvēles un darbības cēloņsakarību meklējumiem (Зарипов, 2008). Zinātnieks uzskata, ka katrs dejas vai baleta iestudējums sākas ar tā saucamo autora hipotēzi – *ieceri*, kas turmākajā darbībā kļūst par vadmotīvu. Iecere nosaka radošo meklējumu vektoru, arī notikumu secību un saistās ar daiļdarba stila izvēli. Stils (*it. stilus – maniere vai izteiksmes veids*) dejā tiek definēts kā noturīgu izteiksmes līdzekļu paņēmieni kopums tēlainības veicināšanai (Балет, 1981, 491). Stils izsaka mākslinieciskās darbības veseluma izpratni visos komponentos: saturā un formā, izteiksmes līdzekļu izvēlē, saistībā ar vēstures posmu. Stils ietekmē izteiksmes līdzekļu izvēli, piešķir kompozīcijai nokrāsu un rezultātā kļūst par kompozīcijas kvalitāti. Stils savieno vienotā veselumā formu un saturu, izteiksmi, laikmetu un personību. Taču ir jāatšķir kompozīcijas vienotība no stilistiskās vienotības. Sižets tiek veidots izejot no ieceres un stila prasībām, taču tā izveidē ir svarīgi ne tikai atklāt notikumus to secībā, bet arī parādīt tēlu konfliktus un peripetijas.

Pedagoģiskie paņēmieni dejas dramaturģijas likumu apguvei *Pedagogical approaches to acquire principles dramaturgy of dance*

Dejas dramaturģijas apguve - sarežģīts un darbietilpīgs process, kurš balstās labās bāzes zināšanās dejas kompozīcijā. Dramaturģiskā darbība

vienkāršākā tās izpausmē paredz notikumu, konfliktu un tā atrisinājumu. Notikumi un pavērsieni veido dramaturģiskās darbības pamatu. Dramaturģijas likumi samēro daļu garumu, veicina darbības aktivitāti un dinamiku, pakļauj darbību iecerei. R. Zaharovs teorētiskajā pētījumā *Baletmeistara piezīmes (Записки балетмейстера)* raksta, ka dejas dramaturģija katrā daiļdarbā tiek izteikta ar kompozīcijas starpniecību, kurā tiek ietverti arī tādi elementi kā dejas zīmējums un teksts. R. Zaharovs uzsver, ka māksla izveidot deju vai baletu pēc būtības ir sacerētāja profesionalitātes pamats (Захаров, 1976, 197).

Rīgas Pedagoģijas un izglītības vadības akadēmijas profesionālā bakalaura programmā *Deju un ritmikas skolotājs* studiju priekšmets ieņem ievērojamu vietu,- tam ir atvēlēti 12 kredītpunkti (18 ECTS), un priekšmets turpinās 4 semestrus. Studiju laikā deju skolotāji iepazīst dejas kompozīcijas pamatprincipus - kustību izvietojumu telpā un laikā, darbības attīstību un dinamiku. Tiek veidota izpratne par dejas kompozīcijas veidošanu kā 3 posmu darbību, kurā apvienojas materiāla izvēle, konstruēšana un iestudēšana (Smith-Autard, 2000). Taču dejas dramaturģijas ar tās sarežģīto struktūru tiek apgūta 4. semestrī, kad studenti būtu spējīgi veidot solodejas ar izteiktu dramaturģiju. Šim nolūkam 4. semestra pedagoģiskais procesa saturs tiek izvietots vairākos posmos:

1. Studenti tiek iepazīstināti ar dejas dramaturģijas teoriju.
2. Teorētiskie atzinumi papildināti ar vizuāliem piemēriem- Leonīda Jākobsona horeogrāfiskām miniatūrām un Borisa Eifmana baletiem *Čaikovskis* un *Rodēns* un to analīzi.
3. Pedagoģa vadībā studenti raksta solodejas vārdisko scenāriju.
4. Studenti patstāvīgi veido un iestudē solodeju.
5. Studenti sagatavo deju demonstrējumam.
6. Notiek diskusija par iestudējuma rezultātu - tiek analizēta dejas dramaturģija, darbība un tās cēloņsakarības, konflikti un risinājumi.
7. Studenti veic darbības pašnovērtējumu.

2015. gada rudens semestrī astoņi 4.semestra studenti veica augstākminētos uzdevumus, saņemot novērtējumu *ļoti labi, teicami un izcili*. Kā liecina pedagoģiskais novērojums un darbības analīze, studentiem nesagādāja grūtības dejas idejas, stila un satura izvēle. Taču septiņi eksperimenta dalībnieki uzsvēra, ka sarežģītākais uzdevums bija panākt darbības attīstību ar konfliktu izstrādāšanu. Īpašas grūtības tas radīja studentiem, kuri bija izvēlējušies veidot solo deju ar latviešu tautas dejas elementu starpniecību. Taču diskusijās noskaidrojās, ka iegūtās zināšanas viņi varēs izmantot arī koncertprogrammu, dejas izrāžu u.c.skatuves notikumu veidošanā.

Secinājumi **Conclusions**

Pētījumā tiek analizēti atklājumi dejas dramaturģijā krievu dejas teorijas pieredzē. Tiek konstatēts, ka dejas dramaturģijas likumi- sarežģīta un daudzslāņaina struktūra, kura ietver sevī darbības sižetu, dejas valodu un plastiskos motīvus. Notikumi un pavērsieni veido dramaturģiskās darbības pamatu, bet darbības loģika un dinamika ir veiksmīgas dramaturģijas likumu pielietošanas rādītāji. Dejas dramaturģijas likumu apguve - sarežģīts un darbietilpīgs process, kurš balstās labās bāzes zināšanās dejas kompozīcijā. Apgūstot tos, studenti izprot atbilstību starp ieceri, stilu un sižetu, kā arī spēj dejās iekļaut darbības konfliktus un to risinājumus. Raksta autore, analizējot krievu horeogrāfu iestudējumus un studentu veidotos darbus, secina, ka daudzveidīgajā deju stilu un žanru pasaulē dramaturģijas likumu pārzināšana nodrošina skatuves darbības spraigumu, kas ir katra veiksmīga horeogrāfiskā iestudējuma pamatā.

Summary

Research analyzes findings concerning dramaturgy of dance in the theory of Russian dance. It concludes that a principle of dramaturgy of dance –a complex and multi-layered structure in itself –includes the plot of the composition, language of dance and the motifs of plasticism. Events and changes in plot constitute the basis of dramaturgical action. However the logic and dynamic of practice form the criteria of successful application of dramaturgical laws. Acquisition of laws of dramaturgy of dance is a complex and time-consuming process, which is related to competencies in composition of dance. By means of acquiring principles of composition of dance, students get to understanding of relationship between intentions, style and plot as well as to include an ability to resolve conflicts and their solutions. By analyzing plays of Russian choreographers, the author of the article concludes that in the varied world of dance styles and genres, knowledge of dramaturgical laws helps to maintain the suspense on the stage, which lies at the heart of every choreographical set.

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AKTIERMEISTARĪBAS PEDAGOGU DARBĪBAS VĒSTURISKĀ ATTĪSTĪBA LATVIJAS TEĀTROS

Drama Mastership Pedagogues Activities' Historical Development at the Theatres of Latvia

Gatis Strads

Rīgas Pedagoģijas un izglītības vadības akadēmija, doktora studiju programma

Abstract. *The article gives an insight into the theatre department pedagogue activity for the training of the emerging drama actors for practice at theatre at Arts higher education school. Monographs, scientific publication materials and archive documents have been analysed on pedagogues' activities at the theatre faculty and the former and the existing pedagogues' interview data about the student training for activity at theatre. The comparative analysis of the drama art study programmes from 1948 till 2015 has been accomplished. The fact has been emphasized that different directors through times base Latvian drama art on K. Stanislavsky's notions of the drama mastery of actors due to the successive professional activity implementation at the theatre. The conclusion has been drawn that the emerging actors' personalities are significant in the training of the emerging actors, their human development would be promoted by inclusion of pedagogy and psychology subjects in the studies by the emerging actors at the tertiary level.*

Keywords: *Professional education, actor training, actor drama mastership pedagogues.*

Ievads

Introduction

Pēdējā laika notikumi pasaulē būtiski aktivizējuši sabiedrību, polarizējot vēl vairāk tās sociālās grupas, kurām ir atšķirīgas asākas vai noteiktākas pozīcijas par sabiedrības norisēm pasaulē. Pozīcijas ir gan par migrantu „jūras” ieplūšanu Eiropā, gan par Ukrainas karu ar Krieviju, gan Krimu, gan Parīzi.

Arī kultūras dzīvē šie notikumi atstāj skaļu un nesen pat neiedomājamu rezonansi sabiedrībā un kultūras dzīves norisēs. Daļa krievu mākslinieku iekļauti Eiropas valstu „melnajos sarakstos”, daļa mākslinieku, gan Krievijā, gan Ukrainā asi polarizējušies savās valstīs. Starp Latviju pārstāvošiem skatuves meistariem īpaši spilgti uz notiekošajiem procesiem reaģējis Rīgas Jaunā teātra mākslinieciskais vadītājs Alvis Hermanis, kas viens no pirmajiem satricināja Latvijas - Krievijas attiecības ar savu atteikumu politisku iemeslu dēļ strādāt Maskavā. Pēc Parīzes notikumiem A. Hermanis jau paguvis ieņemt savu nostāju migrantu krīzē Eiropā – pie viena atkārtojot sabiedrībai komandas domāšanas kopību.

Tieši šie pilsoniskie, no mākslas neatrautie pārliecības komponenti, iespaido skatuves mākslinieka dzīvi un darbību. Īpaša nozīme savu domu, savas domāšanas, savas profesionālās sagatavotības skatuves darbam un publiskās personas statusa veidošanā ir aktiera izglītībai, specifiski svarīgajā izglītības noslēdzošajā fāzē augstskolā. Te liela nozīme ir gan izglītības saturam, gan mācību procesa organizācijai, gan pedagogiem, kas veido jauno aktieru meistarību.

„Mācībspēku kopums augstskolās ir kvalificētākā un organizētākā sociālā grupa jebkurā valstī” (Špona, Vidnere, 2015). Arī Latvijas teātra nozares pedagogi nav izņēmums. Liela mācībspēku daļa ir atzītas autoritātes savā pamatprofesijā (tā nereti nav pedagoga profesija), enerģiski un izglītoti, atbildīgi par jauno speciālistu nākotni.

Pētījums ir sociāli un pedagoģiski aktuāls, jo par aktiera meistarības apguvi un tālākizglītību zinātniskie pētījumi pedagoģijā nav veikti. Informācija par atsevišķiem režisoriem, pedagogiem, aktieriem ir atrodama monogrāfijās un LKA E.Smiļģa teātra muzeja krājumos.

Raksta mērķis. Pētīt un analizēt dokumentus par aktiermeistarības pedagogu darbību, aktiermeistarības apguves studiju priekšmetiem, kuri ir mācību plānos dažādos periodos kopš aktiermeistarības un profesijas ieguves augstākajā izglītībā.

Pētījuma metodes. Teorētiskās pētījuma metodes: monogrāfiju, zinātnisko publikāciju analīze, arhīva dokumentu izpēte par topošo aktieru studiju pedagogiem un studiju programmu analīze. Empīriskā pētījuma metodes: intervijas ar dažādu periodu studentiem un mācībspēkiem par pedagogiem un studiju priekšmetiem.

Aktiermeistarības satura apguves analīze *Analysis of actor drama mastership content achievement*

Aktiermeistarība valsts un pašvaldības teātros nosaka to mākslas attīstības līmeni, ar kuru var lepoties tauta. Tas raksturo augstāk minēto radošo grupu līderismu, kas nodrošināts ar valsts un pašvaldību dotācijām. Pašreizējā posmā neatkarīgie un projektu teātri neveic mākslas virzītāju lomu.

Eiropas mērogā Latvijā aktiermeistarības līmenis ir visumā augsts. Viens no aktiermeistarības veidošanās nosacījumiem ir mācībspēku pedagoģiskais potenciāls aktieru izglītības procesa organizācijā un mācību satura veidošanā. Pievērsīsim uzmanību mācību programmu analīzei.

Analizējot laika periodu no 1948. gada līdz 2015. gadam, atklājās, kā tika sagatavots jauna tipa aktieris, kas spēja ar mākslas spēku atbalstīt pastāvošo politisko režīmu. Atbilstoši tika nosprausti mērķi un uzdevumi, kas atspoguļojās programmās. Izvēloties saturu starp programmām dažādos vēsturiskos periodos,

ar dažādiem skatījumiem par aktiera vietu un lomu sabiedrībā, tika veidoti studiju priekšmetu bloki. Salīdzinot 1971. un 2015. gada mācību programmas mākslas augstskolās Latvijā, mācību priekšmetu bloki ir atšķirīgi. 2015. gada programmā vispār nav sabiedriski politiskie priekšmeti, kuri 1971. gadā bija septiņi jeb 25% kopējā priekšmetu skaita.

1.tabula. Studiju priekšmeti

Table 1 Subjects of studies

		Priekšmeti 2015.gads	Priekšmeti 1971.gads
1			<u>PSKP vēsture</u>
2			<u>Dialektiskais materiālisms</u>
3			<u>Vēsturiskais materiālisms</u>
4	A	<i>Ievads kultūras teorijā</i>	<u>Marksistiski -ļeņinskā estētika</u>
5	A	<i>Kultūras semiotika</i>	<u>Politiskā ekonomija</u>
6	A	<i>Filozofijas vēsture</i>	<u>Zinātniskais ateisms</u>
7	A	<i>20.gs. Rietumu filozofija</i>	<i>Krievu un padomju literat. vēsture</i>
8	A	<i>Pasaules mākslas vēsture un teorija</i>	<i>Aizrobežu literatūras vēsture</i>
9	A	<i>Pasaules literatūras vēsture</i>	<i>Tēlotājas mākslas vēsture</i>
10	A	<i>Mūzikas vēsture, stili un kompozīcijas tehnikas</i>	<i>Krievu un padomju teātra vēsture</i>
11	A	<i>Pasaules teātra vēsture un teorija</i>	<i>Aizrobežu teātra vēsture</i>
12	A	<i>Latviešu teātra vēsture</i>	Franču valoda
13	A	Aktiermeistarības teorija un prakse	Latviešu valoda
14	A	Svešvalodas	Aktieru meistarība
15	B	Skatuves runa un metodika	Skatuves runa
16	B	Skatuves kustība	Deja
17	B	Skatuves deja	Muzikāli ritmiskā audzināšana
18	B	Solo un ansambļa dziedāšana	Akrobātika
19	B	Akrobātika un paukošana	Solo dziedāšana
20	B	stilu un kostīmu vēsture	Skatuves kustība
21	B	<i>Latviešu literatūras vēsture</i>	Skatuviskā paukošana
22	C	<i>Tematiskais filmu lektorijs</i>	Grims
23	C	<i>Kino vēsture</i>	<i>Latviešu teātra vēsture</i>
24	C	<i>Improvizācija un kontaktimprovizācija</i>	<i>Padomju dramaturģijas problēmas</i>
25	C	<i>Latviešu valodas kultūra</i>	<i>Civilā aizsardzība</i>
26	B	Kursa darbs	<u>Zinātniskais komunisms</u>
27	B	Bakalaura darbs	Diplomdarbi

Analīze atklāj kopīgo un atšķirīgo mācību plānos.

Kopīgs ir: studiju ilgums ir 4 gadi; aktiermeistarības priekšmetu bloks; vispārizglītojošo priekšmetu bloks.

Ne toreiz (1971) ne tagad (2015) nav pedagoģijas un psiholoģijas mācību plānos. Citās fakultātēs Konservatorijā bija pedagoģijas kurss mācību plānos

(pat neanalizējot stundu apjomu), tikai ne Teātra fakultātē. Un skaistie vārdi par mākslas, teātra „audzinošo lomu” bija bez teorētiska seguma.

Arī psiholoģijas studijas šajā profesijā mācību plānos nav. Filozofijas sastāvdaļas dialektiskais un vēsturiskais materiālisms ir studiju priekšmeti 1971. gada studiju programmās. Filozofijas vēsture ir 2015. gada studiju programmā.

Atšķirīgais. Vispirms izdalām, tā saucamos politiskos priekšmetus. Šie priekšmeti pasniedzēju ietekmē nereti kļuva par daļēji vispārizglītojošiem priekšmetiem. Piemēram, marksistiski-ļeņiniskā estētika nevarēja apiet estētiku kā filozofijas apakšnozari un padomju laika studenti Latvijā bija pietiekoši analizēt spējīgi, lai secinājumos nenomāktu saprātu. Politiskā ekonomija studentiem, kas spēja apzināt ekonomikas jautājumus, tāpat deva informāciju par būtisko. Zinātniskais ateisms tāpat nevarēja iztikt bez reliģijas vēstures, kas savukārt ir pieskaitāma kā daļa no kultūras vēstures, ja to pasniedz pedagogs ar sava priekšmeta izpratni zinātniskā līmenī. Ar Zinātnisko komunismu gan viss skaidrs - Valsts eksāmens par kaut ko pilnīgi neizprotamu.

Vispārizglītojošo priekšmetu grupā lielākas atšķirības ir teātra vēstures un literatūras grupā. 2015. gada programmās vairs nav krievu (padomju) teātra vēsture un literatūra.

Valodu apgūvē 2015. gada programmā veiktas izmaiņas - franču valodu, kas noderēja kā runas tehnikas pilnveides līdzeklis, ir izņemta no programmas, jo šobrīd viss vērtīgais tiek gaidīts no angļu valodas.

Grimš kā tehnoloģija uz skatuves ir mainījis savu vietu un šīs iemaņas netiek uzskatītas par svarīgām. Ļoti interesants paveras skats uz priekšmetu „Aktiermeistarības teorija un prakse”. Mums pašiem savu mācību grāmatu praktiski nav, ja neskaita Ērikas Ferdas brošūru “Topošā aktiera ķermeņa kultūra” (1968) un Dzintras Mendziņas grāmata „Vārds Doma Runa” (2004). Protams, ir daži tulkojumi, kas gan neliecina par akadēmiskā personāla lielu rūpi par savu zinātni, par saviem audzēkņiem.

Analizējot programmu kopumā – to autori 2015. gada versijā nedod iespēju studentam iegūt maģistra grādu, bet saglabā 4 gadu mācību laiku bakalaura studiju programmā. Kā pamatojumu tam izmanto diplomdarba formu – izrāžu tapšanu, kas praktiski specializācijā aizņem visu gadu. Apzinot aktieru mācību tendences kaimiņvalstīs (Lietuva, Krievija, Polija) kur, turpinot studijas, ir iespēja iegūt šajā profesijā maģistra grādu. Īpaši nopietni tas tiek risināts Krievijā, kur pēc 4 gadu bakalaura kursa aktieri var iegūt maģistra grādu. Pašreizējā izglītības vēlme sniegt akadēmisko, nevis profesionālo izglītību tiek atzīta par šķērslī. Savā tālākajā pētniecībā turpināšu analizēt šos jautājumus un pētīt iespējas sakārtot mūsdienu prasībām atbilstošu profesionālo aktieru izglītību. Gala rezultātā sabiedrību bagātinās mūsdienīgi izglītoti, profesionāli sagatavoti, ar savu identitāti un spēju pašrealizēties mākslinieki.

Aktiermeistarības apguve *Actor drama mastership content achievement*

Vēsturiskā situācija Latvijā pēc 2. pasaules kara krasi mainīja sabiedrisko iekārtu. Zeme izpostīta, mākslinieki izklīduši vai gājuši bojā karā, bet palikušie meklē savu darbu, ko viņi ir veikuši agrāk.

Jaunajai iekārtai ir savi plāni uz teātra mākslu. Pēc kara Latvijā uzsāk darbu 14 teātri. 1944./1945. gada sezonā Latvijā darbojās valsts teātri: Operas un baleta teātris, Drāmas teātris, Dailes teātris, Jaunatnes teātris (krievu trupa no 1946. gada), Liepājas teātris, Valmieras teātris, Jelgavas teātris, Ceļojošais teātris, Latgales teātris, Arodbiedrību Centrālās Padomes Strādnieku teātris, Muzikālās komēdijas teātris (latviešu trupa no 30.12.1945., krievu trupa no 1949.), Leļļu teātris, Rīgas Krievu drāmas teātris, Daugavpils teātris (1945. gadā tikai krievu trupa).



1.attēls. V. Baļuna (pirmā no labās) ar studentiem LKA E. Smiļģa Teātra muzeja krājums
Picture 1 V. Baluna (1st from the right) with students, LAC E. Smiļģa Theatre museum collection

Šobrīd Latvijā no tiem ir palikuši 8 valsts vai pašvaldību teātri un nodibinājies Jaunais Rīgas teātris.

Tā laika centieni pēc ātrāka pilnvērtīga teātru darba saskārās ar galveno problēmu – trūka profesionālu aktieru. Valsts steidzās sakārtot šo jautājumu un lēma dibināt Valsts Teātra institūtu, kas darbu sāka 1948.gadā.

Teātra pasaule ieguva savu augstskolu ar Latvijas izcelsmes pedagogiem (Kazimiru Jalinski, Veru Baļunu, Aleksandru Leimani), kas bija apguvuši profesiju pirmskara Krievijā, un ar labu teātra izglītību varēja papildināt Latvijas izcilākos skatuves meistaros. Dailes teātra ģeniālais radītājs Eduards Smiļģis, Nacionālā teātra izcilība Alfreds Amtmanis-Briedītis un citu teātra spīdekļi tika iesaistīti šajā valstiski svarīgajā projektā.

1951. gadā tika nolemts apvienot divas nelielas augstskolas un teātra institūtu pievienoja valsts Konservatorijai. Tieši ar šo brīdi sākas tas aktieru sagatavošanas process, kas izveidoja daudzus izcilus aktierus. Tas kļuva par pamatu šodienas latviešu aktieru meistarības skolai. Laika periodā no 1951. gada līdz 1961. gadam aktiermeistarības pasniedzēju skaits sasniedz četrdesmit divus. Tie ir pamatdarbā un pieaicinātie stundu mācībspēki. Šāda tendence ar pieaicinātu stundu apmaksas izmantošanu ir raksturīga līdz pat šodienai, kaut pasniedzēju mainība krietni sarukusi un tas vairākiem pedagogiem ir pamatdarbs, kas padomju laikā bija retums.

Kādus plusus un mīnus var pamanīt šajā sistēmā?

Pirmkārt, darba neregularitāte ietekmē pašu mācībspēku. Tikai pāris pedagogiem ir izglītības dokumentā vārds „Pedagogs”. Pedagoģija nav tā nozare, ko mācībspēki varēja iegūt augstākās izglītības procesā.

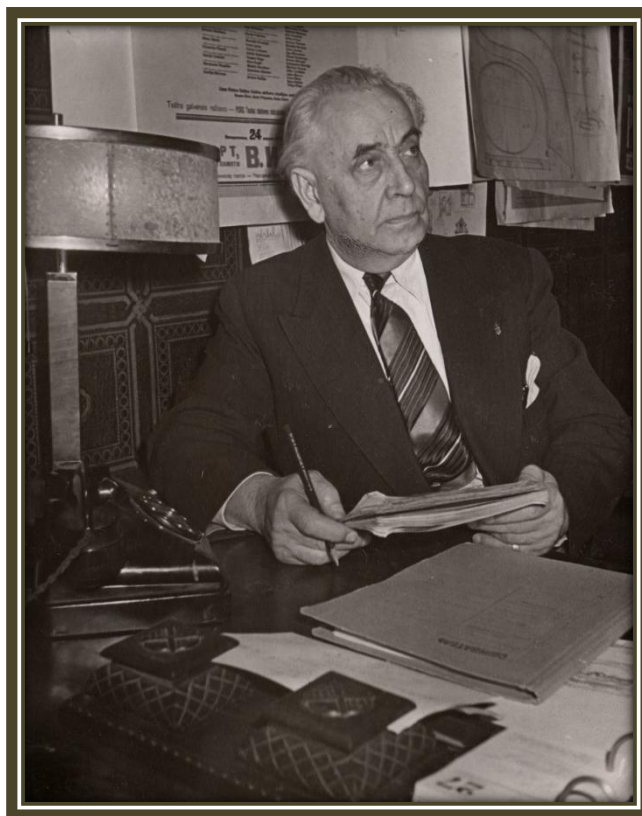
Pedagogu akadēmiskai nesagatavotībai ir vairāki iemesli.

- Aktieru specialitātei ir tikai bakalaura grāda izglītība un tur nemāca pedagoģiju (gandrīz visās citās Konservatorijas specialitātēs to mācīja un mācību laiks bija 5 gadi, kas atbilst maģistra grādam).
- Aktieru kursi tiek uzņemti neregulāri (ar vairāku gadu pārtraukumiem).
- Teātri, uzņemot sev adresētus aktieru kursus, mācībspēkus specialitātē cenšas piesaistīt no sava teātra.
- Darba specifikas dēļ, gan mācībspēkiem, gan studentiem piemēro specifiskus kvalifikācijas noteikumus.

Piemēram, profesora nosaukumus piešķir mācībspēkiem bez zinātniskā grāda. Studentiem bakalaura darbs nav akadēmiskā formā, bet ir līdzdalība diplomdarba izradēs.

Izcilie aktiermeistarības pedagogi *Eminent pedagogues of actor drama mastership*

Latvija ir bagāta ar izciliem aktiermeistarības skolotājiem. Daudziem no viņiem nebija augsta akadēmiskā izglītība. Šai skolotāju grupai raksturīgi aktiermeistarība un režisora talants, prasmes kā spējas nodot savu pašpieredzi jauniešiem. Darba nosaukumā ietvertie vārdi „Nozīmīgākie latviešu teātra aktiermeistarības pedagogi” skaidrojami kā jebkurā pedagoģijas nozarē – rezultāts ir audzēkņi. Pa izcilniekam katram var gadīties, bet patiesi nozīmīgs pedagogs spēj dot pamanāmu skaitu izcilus audzēkņus. Te vairs nebūtu svarīgi vai tas rodas ilgstošā laika periodā vai uzzibsnījot ar pāris izlaidumiem. „Panākt, ka aktierim ir spēles tehnika, dikcija, bet nezūd individualitāte, ir ļoti svarīgs pedagoga uzdevums. Individualitāte ir vērtīgākais, kas ir mūsdienu teātrī un kino” (Ķimele, 2012).



1.attēls. E.Smiļģis, LKA E. Smiļģa Teātra muzeja krājums
 Picture 2 E. Smiļģis, LAC E. Smiļģa Theatre museum collection

Pēckara gados sekmīgi aktieru sagatavošanā strādāja režisors Eduards Smiļģis (23.11.1886.-19.04.1966.). 44 gadus vadījis Dailes teātri un viņa pedagoģiskais rezultāts saistās ar visu Dailes teātri. Interesanta ir viņa sagatavotā aktieru mācību programma Dailes teātra I studijai 1924. gadā. Starp daudzajiem aktiermeistarības priekšmetiem E. Smiļģis iekļāva psiholoģiju. Pats meisters „melno darbu” ar studentiem nestrādāja, bet vairāk veidoja viņu māksliniecisko domāšanu. Tieši teātrī Eduards Smiļģis izaudzinājis lielisku aktieru ansambli, gadu no gada papildinot to ar jaunām zvaigznēm. Lilita Bērziņa, Vija Artmane, Harijs Liepiņš, Uldis Pūcītis, Eduards Pāvuls ir izcilāko aktieru galvgalī latviešu aktieru „reitingā”. Interesenti var ielūkoties Dailes teātra vēsturē un ielūkoties Dailes teātra pirmās studijas mācību programmā, ko sagatavojis Meistars. Liela nozīme darbā ar jaunajiem aktieriem bija E. Smiļģa ilggadīgajai līdzgaitniecei, asistentei daudzos iestudējumos Felicitai Ertnerai (25.06.1891.-09.09.1975.). „Kad es atbraucu no Pēterpils, tad es domāju, ka kaut kur radīsies tādi līdzekļi, ka es varēšu veidot tādu institūtu, kur veidot tādas veselīgus, harmoniskus garā un miesā cilvēkus. Bet šis mērķis jau man paputēja, kā es saskāros ar Eduardu Smiļģi un iegrimu Dailes teātrī...” (Felicitā Ertnerē).



3.attēls. A. Amtmanis-Briedītis (pa kreisi) un A.Jaunušans, LKA E. Smiļģa Teātra muzeja krājums

Picture 3 A. Amtmanis-Briedītis (from left) un A.Jaunušans, LAC E. Smiļģa Theatre museum collection

Rūpīgi un akadēmiski savu darbu aktieru audzināšanā ieguldījis otrs dižgars – Alfreds Amtmanis-Briedītis (05.08.1865.-15.05.1966.). Drāmas (tagad Nacionālais) teātris allaž varējis lepoties ar lielāko zvaigžņu skaitu pie teātru debesīm. Tieši viņa vadības un pedagoga darba laikā uzplauka Elza Radziņa, Velta Līne, Lidija Freimane. Drāmas teātra līderis un galvenais režisors Alfreds Amtmanis-Briedītis gandrīz visus pēckara gadus aktīvi strādā tā laika līderu komandā - gan Vera Baļuna (18.09.1904.-17.04.1978.), kas izaudzināja Veltu Līni, Alfredu Jaunušanu, Jāni Kubili, Gunāru Cilinski, Antru Liedskalniņu un daudzus citus, ar laiku pārņemdamā Konservatorijas Teātra fakultātes vadību. Par viņas audzēkņiem kļuva visi kursi līdz 1975. gadam, kad kārtējās pārmaiņu norises viņu aizsūtīja atpūtā.

Noteikti jāpiemin izcilā runas pedagoge Olga Groskaufmane-Bormane (1893.20.12.-1968.12.05.). Pēckara gados beigušie aktieri viņu atceras ar īpašu cieņu.

Jau tūlīt pēc studiju gadiem aktīvi pedagoģijā sevi pieteica nākamais Drāmas (tagad Nacionālais) teātra galvenais režisors Alfreds Jaunušans (24.03.1919. -24.06.2008.), kas no 1966. līdz 1987. gadam vadīja šo teātri un izskoloja tādas skatuves meistaros kā Ģirtu Jakovļevu, Uldi Dumpi, turpināja spodrināt Antru Liedskalniņu, izaudzināja vienu no talantīgākajiem sava laika režisoriem Mihailu Kublinski. Pats vienmēr būdams prasīgs pret sevi, nesaudzīgi to prasīja no aktieriem.



4.attēls. **A.Liniņš**, LKA E. Smiļga Teātra muzeja krājums
Picture 4 A.Liniņš, LAC E. Smiļga Theatre museum collection



5.attēls. **P.Krilovs**, LKA E. Smiļga Teātra muzeja krājums
Picture 5 P.Krilovs, LAC E. Smiļga Theatre museum collection

Viņa kolēģi Dailes teātrī bija Pēteris Pētersons (24.05.1923.-09.10.1998.) un Arnolds Liniņš (11.11.1930.-12.09.1998.), kas pārņēma teātri pēc P. Pēterona. Abi izaudzināja vairākas aktieru paaudzes, kas vēl šodien strādā šajā teātrī. Arnolds Liniņš bijis režisors Latvijas Nacionālajā teātrī un Dailes teātrī, kur no 1971. līdz 1987. gadam bijis galvenais režisors. Kopā ar

dzīvesbiedri Ainu Matīsu (dz.14.06.1938.), kas pedagoģisko darbu aktieru audzināšanā uzsāka 1968. gadā un strādā par runas pedagoģi vēl šodien. Dailes teātra pedagoģe Ērika Ferda, ieguldīja nozīmīgu darbu jauno aktieru sagatavošanā. Tādi vārdi teātra un kino pasaulē kā Jānis Paukštello, Andris Bērziņš, Esmeralda Ermale un daudzi citi izauguši kopā ar šiem nopietnajiem pedagoģiem. Šodienas aktīvākie pedagoģi noteikti mināmi Latvijas Kultūras akadēmijas mācībspēki Pēteris Krilovs (dz. 18.02.1949.) un Anna Eižvērtiņa (dz. 29.01.1945.), kā arī Felikss Deičš (dz. 02.04.1937.) un Mihails Gruzdovs (dz. 12.12.1953.). Ilggadīgs pedagoģis bija Edmunds Freibergs (dzimis 1948), kas aktieru pedagoģijā strādājis no 1978. gada.

Secinājumi **Conclusions**

Pētījumā tika noskaidrots, ka aktuāla ir mūsdienu topošo skatuves mākslinieku vispusīga izglītība. Nepieciešams veidot divu līmeņu aktiermākslas izglītību. Studiju saturā ir nepieciešams iekļaut pedagoģijas un psiholoģijas kursu, kas dotu iespēju nākamajiem aktieriem paaugstināt viņu dzīvesdarbības kvalitāti un līdzvērtīgi sadarboties uzveduma iestudēšanas laikā ar režisoru. Pētījumā aktualizējās fakts, ka Latvijas aktieru veidošanās pamatā ir K. Staņislavska aktiermāksla, jo vadošie docētāji studējuši Maskavā vai Pēterburgā, bet jaunākie režisori pēctecīgi apguvuši režisoru mākslu pie izciliem skolotājiem pašu mājās. Ievērojamie aktiermeistarības pedagoģi Eduards Smiļģis, Alfreds Amtmanis-Briedītis, Vera Baļuna, Aleksandrs Leimanis, Olga Groskaufmane-Bormane, Felicita Ertnera, Alfreds Jaunušans, Ērika Ferda, Pēteris Pētersons, Arnolds Liniņš, Aina Matīsa, Felikss Deičš, Pēteris Krilovs, Anna Eižvērtiņa, Edmunds Freibergs ar savu darbu ierakstījuši zelta lappuses Latvijas teātra pedagoģijā.

Empīriskajā pētījumā tika uzziņāts, ka svarīga ir topošā mūsdienu aktiera personība, kas veidojas, uzkrājot vispusīgas zināšanas, attieksmes un pašpieredzei studijās un darbā.

Summary

The actuality of the holistic education for the contemporary emerging drama actors through the research has been established. There is an urgent need to develop the actor drama mastership education at two levels. The course in pedagogy and psychology must be included into the study content that can give opportunity to the emerging actors to increase their life activity quality and provide possibility for equal validity cooperation with the director during the staging of the performance. The research highlighted the fact that at the basis of Latvia's actor training lays the drama art system by K. Stanislavsky as the leading academics had studied in Moscow or Petersburg, while the younger directors successively have gained their director art at the eminent teachers in their homeland.

The empirical research revealed that significant is the personality of the emerging contemporary actor, which develops by storing holistic knowledge, attitudes and self-experience at studies and through work.

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