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## Nazi Feature Films on the Russian Topic: Hermeneutic Analysis

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### Abstract

In this article the author made an attempt to perform a hermeneutic analysis (investigation of media texts interpretation, cultural and historical factors influencing the views of the agency / author of a media text and the audience) of specific examples of Nazi feature films. The hermeneutic analysis of a media text comprehension involves a comparison with a historical, cultural tradition and reality; insight into its logic; comparison of media images in historical and cultural contexts combined with the historical, hermeneutical analyses of the structural, plot, ethical, ideological and iconographic / visual analyses of media stereotypes and media text characters.

**Keywords:** Nazi; German films; Russian topic; hermeneutic analysis; screen; media studies; film studies.

### Introduction

The media texts under analysis have been disregarded by Russian culture experts, political scientists, historians and film experts for many decades. In the Soviet period it was not done to mention whatever feature films on the subject of Russia were shot in the Nazi Germany. Even N. Nusinova in her complete monograph devoted to the 1918-1930 Russian cinema abroad published in the 21st century avoids this topic [Nusinova, 2003]. It seems rather odd since the cinema of the Third Reich had a famous actress Olga Chekhova (1897-1980), producer Victor Turzhansky (1891-1976), actors Nikolay Kolin (1878-1966), Boris Alekin (1904-1942), etc. A. Vasilchenko, a well-known analyst of Nazi history, also neglected the Russian theme in German films of the period in his book about the Nazi cinema [Vasilchenko, 2010].

### Materials and methods

In our earlier works [Fedorov, 2008; 2011; 2012, etc.] we referred to the *hermeneutic analysis of media texts* many times [Eko, 1998; 2005; Eco, 1976; Silverblatt, 2001, pp.80-81]. This time we shall take audiovisual media texts of the Nazi cinema on the theme of Russia as an example. The analysis of these media texts, in our opinion, is especially important for media education of future historians, culture experts, art critics, social scientists, philologists, psychologists and teachers.

### Discussion and results

*Hermeneutic Analysis of Audiovisual Media Texts of the Nazi Cinema on the Theme of Russia: Setting; Historical, Cultural, Political and Ideological Contexts*

#### A. Historical Context

a) *Setting.* As a rule, the scene is laid in the remote past (*The Favorite of the Empress, Cadets, The Citadel of Warsaw, The Postman, It Was a Gay Ballnight*) and the recent past (*Double-Agent Asew, Battleship "Sebastopol" - White Slaves*), though the modern period cannot be excluded (*G.P.U. / The Red Terror*); Germany, Russia and other countries;

b) *when did the premier take place?* The films under analysis were created and shown on the western screen in the second half of the 1930s - in the early 1940s. On average one or two films on the theme of Russia were made per year in Nazi Germany.

c) how did the events of that time affect the media texts? d) what events occurred when the media texts were being created? How did the media texts comment on the events? How does the awareness of the historical background contribute to the comprehension of the media texts?

The appearance of these media texts was certainly caused by real events which took place in the 1930s – 1940s. When Hitler came to power the tendency of the Third Reich-USSR confrontation became apparent. That is why there were two conceptions of reflecting "the Russian world" in the Nazi cinematography: tsarist Russia, emigrant Russia could get a positive film interpretation (*The Favorite of the Empress, It Was a Gay Ballnight, From Midnight, etc.*), whereas Bolshevism and Soviet Russia would always look negative on the screen (*Battleship "Sebastopol" - White Slaves, G.P.U. / The Red Terror*). It should also be noted that after the German intervention on the USSR in 1941 both tsarist and emigrant Russia ceased to interest the cinematography of the Third Reich and was at best on the fringes of plots (for example, in the form of episodes with Russians) whereas the Nazi film, *G.P.U. / The Red Terror* shown in 1942 actively exposed "bolshevist spies' schemes"... Besides unlike the Soviet cinematography where from 1941 to 1942 there were shot over 70 short (including novels in "Battle Film Collections") and full-length films which directly reflected the events of the war with Germany, the Nazi cinema relied on reported war chronicles.

### B. Ideological, Political Contexts.

*How do media texts reflect, strengthen, instill or form this or that ideology?*

One cannot but feel an obvious propagandistic message aimed at persuading the audience that:

- Russia used to be great when it was an empire where culture flourished (a comedy about the life of Russian aristocracy in the epoch of Empress Elisabeth - *The Favorite of the Empress*, a musical melodrama about the life of P.I. Tchaikovsky - *It Was a Gay Ballnight*);

- at the same time the imperial policy of Russia could be dangerous for other European countries (*The Citadel of Warsaw, Cadets*);

- after 1917 one can express sympathy only with Russians who suffered from Bolsheviks and those who emigrated to the West (*Battleship "Sebastopol" - White Slaves, From Midnight, etc.*);

Bolsheviks practice mass terror both towards representatives of aristocracy and civilian population, their aim is to turn Russian people into slaves (*Battleship "Sebastopol" - White Slaves, G.P.U. / The Red Terror*);

- armed resistance to Bolsheviks is justified and indispensable (*Battleship "Sebastopol" - White Slaves, G.P.U. / The Red Terror*).

In whole, the ideological and political contexts of the world outlook presented in Nazi feature films on the theme of Russia may be outlined in the following way (Table 1):

**Table 1. Ideology and Political Context of the Outlook Represented in Nazi Feature Films on the Theme of Russia**

Key Questions	Representation of the Russian Past World	Representation of the Soviet World
<i>What is the ideology of this world?</i>	Monarchist ideology	Communist aggressive ideology
<i>What outlook does this world present - optimistic or pessimistic?</i>	Optimistic world outlook prevails, though, in some cases there can be different variants	Mostly self-confident and optimistic; pessimism takes place only the negative end for Bolshevik characters

<b>What is the hierarchy of values according to this outlook?</b>	Patriotism - monarchy - culture - nation - family - love.	Communism - Bolshevism – aggression - inhumane treatment of victims, dismissive attitude to the inferior
<b>What values can be found in this media text? What values dominate in the end?</b>	Patriotic, monarchist, family values.	Communist, Bolshevik values
<b>What does it mean to be a success in this world? What person succeeds in this world? What conduct is rewarded in this world? To what extent is it stereotyped?</b>	It means to be a monarchist, patriot, a good family man. In this aspect positive characters are stereotyped, though they may possess some individual traits (beauty, humor, musical talent)	It means to be a bolshevist – communist who is cruel to his victims. In this aspect characters are stereotyped, though they may possess some individual traits (slyness, stupidity, cowardice)

### C. Cultural Context

#### *How do media texts reflect, strengthen, or form cultural: relations, values, and myths?*

Being a product of mass/pop culture Nazi films on the subject of Russia are based on folk and mythological sources including the traditional notion of the Western world about the "mysterious Russian soul". In this respect it is interesting to analyze Karl Anton's (1898-1979) film *Battleship "Sebastopol"* - *White Slaves* (1937) in which the myth about the rebellious *Battleship Potemkin* (1925) brilliantly created by Sergei Eisenstein was apparently used.

And it is not accidental since as late as 1933 the then head of the Culture Department minister J. Goebbels said about the film *Battleship Potemkin* at the meeting with German filmmakers: "This is a wonderful film. From the cinematographic point of view it is unmatched. The one who has no firm political convictions could have become a Bolshevik after watching the film. It also proves that one can easily suggest some tendency in a masterpiece. Even the worst ideas can be propagandized with artistic means" [Vasilchenko, 2010, p. 5]. Thus it was a government order in its way to create a Nazi analog of S. Eisenstein's film. And in 1937 this order was completed by K. Anton. In the film *Battleship "Sebastopol"* - *White Slaves* the seaman as well as in S. Einstein's film stirred up a rebellion on shipboard. But this event was given with a reversed sign, i.e. the rebellion aboard the *Battleship "Sebastopol"* is fomented by malicious and fierce Bolsheviks who slaughter noble officers, priests, rape women, burn orthodox icons... But, God be thanked, there is a Russian officer, Count Konstantin Volkov who gathers true seamen devoted to Russia. He disarms the rebels and frees the captives. At the end of the film Count Volkov pronounces a conceptual phrase of the film *Battleship "Sebastopol"*: "This calamity doesn't concern only Russia. The enemies of civilization must be destructed. The struggle is pursued!" Then his thought is supported by one of his companions-in-arms: "Peoples don't see this danger yet..."

*D. Genre Modifications:* generally – a drama and melodrama. At the same time, not only Russian but also German actors were involved in the film.

#### *F. Basic Drama Stereotypes of the Media Texts:*

- love adventures of Russian aristocrats;
- sufferings of Russian emigrants who fled from Bolsheviks;
- Bolsheviks' destruction of a peaceful, tranquil and happy life of people; their occupation of the ship, city, mass communist terror (executions, tortures, etc.) towards the civilian population including women; the struggle of the best representatives of the Russian people with Bolsheviks.

In particular, in the film *G.P.U. / The Red Terror* directed by Karl Ritter (1888-1977) - one of the most famous Nazi filmmakers and a member of the national-socialist party since 192, the major positive characters - Irina and Peter get into an underground prison situated in the building of ... the Soviet consulate in Rotterdam. Their story would have had a tragic end if it had not happened in May, 1940. It was at this point that the Nazi army started their occupation of Holland. So, taking the advantage of the bombing and panic of Soviet "diplomats" Peter kills the torturer-Cheka officer, frees Irina from the cell who is more dead than alive, helps her get out into the street where Wehrmacht tanks are already rolling over it. Here is freedom, light, and a triumph of justice...

*Techniques of reality representation (iconography) - setting, conditions of life, etc.*

Simple dwellings and conditions of life of "ordinary" characters (of course if they are not in Soviet prison cells); luxurious apartments of the Russian aristocracy. Everyday life of Bolsheviks is shown with somewhat grotesque but in whole it is also verisimilar (there are portraits of leaders on the walls, etc.).

*Typology of characters (their values, ideas, ethics, clothing, constitution, vocabulary, mime, gestures)*

Character's age: 18-60 (men), 18-30 (women).

Character's race: white.

Character's appearance, clothes, constitution:

a) Russian characters of the tsarist time as well as the characters who emigrated from the Bolshevik regime to the west are dressed depending on their social status: luxury of the imperial palace (*The Favorite of the Empress*), modesty of the postmaster (*The Postman*), etc. The appearance of these characters is attractive as a rule, especially it concerns the representatives of aristocracy;

b) Bolshevik characters are normally dressed in a uniform with attributes of the time (a leather jacket, cartridge belts, a Mauser, etc.); they are robust though sometimes may have a commonplace physical constitution; in most cases they are physiognomically disagreeable.

c) victims of the Bolshevik terror are dressed in accordance with their social standing; their constitutions vary in a wide range and depend on the context of a certain film; female characters are rather attractive as a rule;

Educational attainment: higher education (officers, aristocrats), secondary education, illiterate people.

Social standing, profession: the social standing of Russian and Soviet characters (aristocrats, officers, emigrants, ordinary people, Bolsheviks, etc.) varies considerably depending on definite film plots.

Marital status of characters also depends on the film plots.

Character traits: cruelty, meanness, sexual concern, tenacity of purpose, hostility, slyness, power (Bolshevik characters); nobleness, power, purposefulness, courage (positive characters - aristocrats, emigrants, the intelligentsia, etc.). Bolshevik characters are shown as malicious, rude and cruel fanatics with a primitive speech, active gesticulation and rough voice timbres. Positive characters, on the contrary, are gallant and soft-voiced. In whole the characters of all Nazi media texts on the subject of Russia are given only in an outline without a psychological insight.

*Value orientations (ideological, religious, others) of a character:* in the films about Bolsheviks (*Battleship "Sebastopol" - White Slaves, G.P.U. / The Red Terror*) communist values together with atheism, terror and violence are clearly revealed. The values of positive characters are close to "all-European" ones.

*Conduct of a character, his strategy of conflict resolution:* the characters' behavior is motive by the development of the above-mentioned stereotyped media text plots. Bolshevik characters in most cases behave cruelly and mercilessly but their victims either suffer from a feeling of doom and



dread or show determination to stand up to the end. The actions of Russian characters from Nazi films about the time before 1917 depend on certain plots and genres and can vary in a wide range - both negative (Russian characters in the war drama *Cadets*) and positive (P.I Tchaikovsky in the musical melodrama *It Was a Gay Ballnight*)

*Significant changes in the media text plot and characters' lives, the incipient problem, search for solutions to the problem*

In the films with Bolshevik characters a peaceful and happy life of positive characters is broken by aggressive actions of revolutionary seamen, Cheka officials and other negative personalities. The incipient problem: as a result of Bolshevik extreme violence the lives of positive characters are under threat. And there is only solution to the problem, i.e. struggle against Bolshevism. In the films about the time before 1917 (for instance, films about the life of Russian emigrants) the plots are more varied and are not so much stereotyped.

### **Conclusions**

Thus we made an attempt to perform a hermeneutic analysis (investigation of media texts interpretation, cultural and historical factors influencing the views of the agency / author of a media text and the audience) of specific examples of Nazi feature films. At the same time we mean that the hermeneutic analysis of a media text comprehension involves a comparison with a historical, cultural tradition and reality; insight into its logic; comparison of media images in historical and cultural contexts combined with the historical, hermeneutical analyses of the structural, plot, ethical, ideological and iconographic / visual analyses of media stereotypes and media text characters.

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### ***Selected Filmography***

**Double-Agent Asew / Lockspitzel Asew. Germany, 1935.** Film director: Phil Jutzi. Script writer: At. Timann. Cast of actors: Fritz Rasp, Olga Chekhova, Hilde von Stolz and others.

**The Favorite of the Empress / Der Favorit der Kaiserin. Germany, 1936.** Film director: Werner Hochbaum. Script writers: Charles Amberg, Hans Martin Cremer and others. Cast of actors: Olga Chekhova, Anton Pointner, Heinz von Cleve, Ada Chekhova and others.

**Battleship "Sebastopol" - White Slaves / Panzerkreuzer "Sebastopol" - Weisse sklaven. Germany, 1937.** Film director: Karl Anton. Script writers: Charlie Roellinghoff, Karl Anton, Arthur Pohl, Felix von Eckardt. Cast of actors: Camilla Horn, Karl John, Werner Hinz, Theodor Loos, Fritz Kampers and others.

**The Citadel of Warsaw / Die Warschauer Zitadelle. Germany, 1937.** Film director: Fritz Peter Buch. Script writers: Gabriela Zapolska, Fritz Peter Buch. Cast of actors: Lucie Hoflich, Werner Hinz and Claire Winter.

**From Midnight / Ab Mitternacht. Germany, 1938.** Film director: Carl Hoffmann. Script writers: Joseph Kessel, I. Ermoljev. Cast of actors: Gina Falckenberg, Peter Voss, Rene Deltgen, N. Kolin and others.

**It Was a Gay Ballnight / Es war eine rauschende Ballnacht. Germany, 1939.** Film director: Carl Froelich. Script writers: Jean Victor, Jean Victor and others. Cast of actors: Zarah Leander, Aribert Wäscher, Hans Stuwe and others.

**The Trip to Tilsit / Die Reise nach Tilsit. Germany, 1939.** Film director: Veit Harlan. Script writers: Curt Johannes Braun, Veit Harlan, Hermann Sudermann. Cast of actors: Anna Dammann, Frits van Dongen, Heiner Dugal and others.



**Cadets / Kadetten. Germany, 1939.** Film director: Karl Ritter. Script writers: Felix Lutzkendorf, Karl Ritter. Cast of actors: Mathias Wieman, Carsta Lock, Andrews Engelmann and others.

**The Postman / Der Postmeister. Germany, 1940.** Film director: Gustav Ucicky. Script writer: Gerhard Menzel (based on A.S. Pushkin's story "The Postmaster"). Cast of actors: Heinrich George, Hilde Krahl, Siegfried Breuer and others.

**G.P.U. / The Red Terror. Germany, 1942.** Film director: Karl Ritter. Script writers: Andrews Engelmann, Felix Lutzkendorf, Karl Ritter. Cast of actors: Laura Solari, Will Quadflieg, Marina von Ditmar and others.

## Public Sector Unit: the Tacit Dimensions

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### Abstract

This paper throws light on some burning issues of human resource in coal mining sector in contemporary West Bengal. Expansion of coal mining to a large scale is required and it presents enormous challenges not only in ensuring safe and efficient resource extraction techniques, pollution control and roadway / railway infrastructure development, but most importantly making the coal industry responsive to emerging social issues related to coalmining. Enormous challenges in this regard include transparent and accountable community consultation, involvement and participatory development, responsible resettlement and rehabilitation of coalmine-affected populations, and reassessment of numerous Government regulations, policies and legal mechanism relating to land acquisition and mine operations. Beside land acquisition factor entire coal mining sector is now facing some problems related to internal human resource management. This paper aims to focus particularly on some underlying issues relating to human resource on one side and society's reaction against land acquisition on the other.

**Keywords:** exploitation; dilemma; displacement; fundamental rights; human rights; indebtedness; social justice.

### Introduction

The aim of this research paper is to present a selective introduction to key concerns in the work and employment conditions in Coal India Ltd. It unfolds theoretical perspectives, comparative, and historical to bear on understanding contemporary transformations of occupation and employment in the 'new economy', with particular emphasis on the Eastern Coalfields Ltd. where social organization and technological content have varied widely across time, space, and industrial sector<sup>1</sup>. Employment or paid work, by contrast, is essentially a social construction, whose boundaries in relation to other types of activity like household labor, leisure, superannuation, or unemployment are institutionally and culturally defined. In India like other social parameters, employment is also a social and legal category, which carries with it distinctive rights and obligations (at least for certain sections of the workforce), such as protection from arbitrary removal from office, subordination to administrative authority, procedures for collective representation, and entitlements to benefits like paid leave, pensions, and medical care<sup>2</sup>. Both the boundaries of employment and the position associated with it are thus historically contingent constructs which differ significantly from one public sector units to another, and are currently being renegotiated in response to a multiplicity of pressures, from globalization and technological innovation to the expansion of the service sector, demographic trends, and changing household/family structures<sup>3</sup>.

It is very perplexing when PSU employees could neither perform the job easily nor they could remain in the job due to permanent indebtedness. Dilemma is a circumstance in which one must choose between two alternatives, it's a situation in which none of the alternatives offers escape. In vast area of Eastern Coalfield Ltd. major number of collieries is situated under this subsidiary of Coal India Ltd. The scenario regarding indebtedness seems to be same in all these coal belts. This disease has grabbed semi skilled and unskilled workers; however Clerical staffs have not been spared. A sizeable number of employees belong to SC (Schedule Caste) and ST (Schedule Tribe) category. Due to multiplicity of reasons many workers take loan from various sources (other than legal institution) with a high rate of interest, which may be 5 to 6 percent per month, means 60 to 72 percent per annum. Many moneylenders become prepared with their purse to trap the victims and the victims fall easy prey in their net. The problem begins with difficulty to repay the installment to the concerned authority and subsequent threatening of moneylenders. With limited

income neither workers become able to pay money easily nor can they maintain their family happily.

The victims cry out for getting out from the crisis but their voices remain unheard and suppressed in the midst of affluent coal workers - the affluence which has been given birth at the cost of the blood of these bereaved. No social justice is there to attain to their crisis. No fundamental rights of the constitution come forward to their rescue. The victims sink in the darkness unfathomed. The workers have right to perform their duty with dignity and prestige and they have also right to look after their family satisfactorily. The right to food and water, housing, which includes resettlement and rehabilitation, access to education, access to provisions of health and healthcare, right to work, and access to information and the right to communication all these are form of social justice.

Another serious problem is up-rooting of people for the industrial expansion. This is becoming very serious issue for the policy maker day by day. Dislocation or up-root of settled people is widespread as well as hanging crisis in any coalmining area and obviously treated as an age-old setback of coalmining areas like Raniganj. North Searsole Colliery also faces all related issues due to coalmining activities connecting ecological as well as socio-economic degradation and resettlement of adjacent people. Relocation is a term used to explain the movement of persons or mass from one place to other, although the word can refer to intentional or unintentional human migration, it is frequently an euphemism for forced resettlement due to a few such activities. The rising demand for energy requires an extension and speeding up of coalmine exploration, production and processing in India. A huge ongoing 'social-challenge' for the coalmining industry is the difficulty of coalmining induced displacement and relocation in the present study area. Eastern Coalfields Limited (ECL) is taking special concern to provide openhanded package of compensation to persons affected by projects. But the complicatedness lies in the actuality that not only do the inhabitants lose their residence, but they are also deprived of the property and natural wealth that comprised their economic survival base. The natural resources are nonformal sources of earnings which are not often documented or recognized, and hence hardly ever compensated for. So, lots of environmental and social problems are generated due to such activities deliberately or unintentionally in coalmining areas. Other apprehensions due to coalmining-induced dislocation and movement are some of the socioeconomic, demographic and cultural complexities together with the changes in populace dynamics, physical condition impacts, economic disparity, addictions, and disappointment. All these are affecting not only financial, but moral, socio-cultural degradation, which are restructuring the prevailing lifestyle in holistic mode. Consequently, dislocation of rural communities along with religious, their long standing, cultural activities, economic and societal is inevitable. When coalmining occurs in property held traditionally by aboriginal community, mining activity gives rise to issue of social justice. Dislocation has a discouraging influence on societal bonds and psycho-cultural roots of the whole society, and leads to social and economic problems. The leaseholds for the under-ground coalmines are obtained from the landlords who grant coalmining authority the right for under-ground coal mining. The land for residences, dwellings and the connected activities are procured bit by bit from several sources while large segment of the surface land right remained under the control of cultivators and landlords. Under-ground coalmining in these vicinities is conducted with full liability of the surface safety by the authorities who normally maintain pillars as the natural support to the surface features. Escalating demand for opencast coalmining process requires huge land. These lands sometime are acquired at the cost of cultivable land. Coal mining has direct impact over agriculture in the study region and residual impacts of mining bring far reaching consequences<sup>4</sup>.

### **Objectives of study**

Present study is an attempt to know the various causes of indebtedness among the employees of North Searsole Colliery. It is also intended to know the intrinsic factors motivating the workers for loan, which may be beyond the capacity to repay with high rate of interest and to know the socio-economic background of workers of this colliery. This study is to reveal those disguised people who are giving loan illegally with high interest rate on day light in front of administration. An attempt has also been made to know the process of modus operandi of moneylenders and relationship between giver and taker. One of the objectives is also to know the role of welfare/personnel department in understanding this problem.

### **Area of study**

The area of this study is North Searsole Colliery. It is situated in famous Raniganj coalfield in West Bengal, India and 9 km from Raniganj Railway station towards Grand Trunk road. It is one of the best collieries in ECL for production and good quality of coal. This colliery has manpower of 1061. Most workers belong to surrounding places and majority stay at colliery quarters. This colliery has opencast mining as well as underground mining. Here Public Sector Unit (PSU) stands for ECL.

### **Methods of study**

This research paper is mainly based on primary data, which has been collected from 100 samples on the basis of interview schedule. Purposive sampling was used to choose the sample. All the workers are semi skilled or unskilled. An interview has also been taken from personnel officer of this colliery. Through participant observation with workers few data is collected. However secondary sources are also used for data collection.

### **Various issues of indebtedness in Coal India**

In North Searsole Colliery all workers are involved in different job as per their skill and eligibility. Present context of study is about the semiskilled and unskilled workers. During study particularly it is revealed that those who have taken loan from any individual or private firm their condition is more miserable than those taken from legal sources. Most of the workers who have taken loan from any individual moneylender are taken in confidence. They are made to convince about reasonability of interest rate, which may vary person to person. Loan from moneylender is primary concern and focal point in the present study. The rate of interest is 5 to 6 percent per month, which means 60 to 72 percent per year. Due to illiteracy and inadequate knowledge these section of workers become soft victim of moneylenders. Most of the moneylenders do not belong to the colliery but they operate outside from the colliery. Their operation is clandestine their targets are fixed. They take pay slips, Identity card, PF / Pension books, Bank passbooks etc as mortgage before giving loan to anybody. Without these statutory documents nobody can draw their salary. They also obtain written agreement on stamp paper from the worker. During salary days workers are asked to pay initially the interest of loaned money. Gradually, it has been observed that the principle with the rate of interest exceeds the worker's salary. Few workers have multiple loans from several places. Paying off the interest every month to moneylenders has become unmanageable to them. Some of the workers have taken more than one loan only to avoid inconvenience from the first moneylender. This way they get trapped in the vicious cycle of loan interest<sup>5</sup>.

Main causes for loan were marriage of family members, or for treatment of serious disease. But some workers regularly consume alcohol, drugs and have gambling habit. Those who have taken to fulfill situational exigencies seem to be more painful than the latter category. They have a strong sense of social prestige and fame. Moneylenders reach to them every month during salary. They take major part of worker's salary. If due to any reason workers fail to pay interest they are often threatened or even physically assaulted. During interview it was felt that workers were very much scared. On the way from home to the colliery either moneylender himself or his appointed person gives reminder to his prey. This happened to every person who obtained loan. This situation creates two fold problems. Neither the workers are free to perform their duty nor can they sit at home doing nothing. If they come to work places moneylenders harass them, if they sit at home the fear of termination from the job for unauthorized absence from duty drives them to restlessness. This is real dilemma. It becomes very difficult to choose either option.

Impact of taking loan can be identified with economical aspect in specific and social in general. The workers become less interested to work or they get gradually alienated from the work, from society and ultimately from themselves. This may be the real case of Marxian notion of alienation. In this way colliery's production is adversely affected on the one hand and social life of workers become hell on the other. Some time they become a psychotic patient. The high rate of absenteeism is observed among these category workers and this lead them to get unexpected charge sheet and termination from service subsequently. From the first hand experiences about the workers it has been observed that they can't lead a general smooth social life as others do. Their family life becomes worse. Their children are affected with parent's disturbance. Sometimes such

workers resort to fasting for want of money and take food only once in a day. This is strange that a public sector service holder can't have stomach full food twice in a day far to speak about nutrition level. Past experiences revealed that some workers had committed suicide. Apparently it seems that the workers are responsible for their own misfortune. They have chosen their own destiny. We all would agree that partially the workers are responsible for their misery. But what's about those who are openly borrowing money with high rate of interest? It is not only inhuman but a naked violation of human rights. Money lenders are operating openly, they don't hesitate to use unfair means to get back their money. Neither management plays a role to prevent them nor does civil administration think seriously on this matter. We can't deny the role of high profile racket monitoring behind the small moneylender. Throughout the colliery this loan giving business with high interest rate is on the increase. If this business could not be stopped in near future there might be a serious IR problem in the coal mining industry. Not only the worker's ignorance is responsible for this dilemma but also whole civil society is also responsible for this sort of problem<sup>6</sup>.

Realizing their problem the workers take loan generally from legal authority such as Bank, co-operatives and PF. But low literate and illiterate workers often don't want to go through bureaucratic and administrative system to get a loan. So the easiest and fastest way to fulfill the situational financial exigency they go to moneylender. Here moneylender having nuisance value has a crucial role to misguide and often mislead such innocent workers. Moneylender make the workers understood that they have to pay only 5 to 6 percent interests. Which may seem to be lower than the nationalized bank also. They tend to confuse per month interest rate with per annum. But the moneylenders resort to jugglery of calculation of percentage of interest. Here neither worker has to pay a processing charge nor has to mortgage lots of documents. So they become easy victims. Generally these workers get a salary of about Rs.10, 000 per month. In this salary if they pay 60 to 72 percent per annum interest it is really difficult to maintain the normal family life, though it all depends on the amount of the loan. So every month workers have to pay the interest irrespective of the constraints. They may remain in empty stomach but interest should reach moneylender. The essential documents concerning payment have already been mortgaged to secure constant inflow of interest. In many cases borrowers have failed to pay some installments.

Thus the loaned amount gets multiplied for compound rate of interest. During the time of superannuation a huge amount of money from the borrowers is grabbed from his superannuation benefit like Provident fund, gratuity etc. As per the version of the management the gratuity cheque handed over to workers is ultimately collected by the moneylender well before it goes to concerned Bank for encashment. The amount in many cases is large. In some cases the workers don't turn up to collect their gratuity cheque because by the superannuation time the borrowed principle money with interest exceeds the gratuity amount. As information supplied by the authority such superannuated persons whose native place is far from colliery left the colliery without any information.

The role of local political party is not satisfactory in this regard. The trade union leaders are also silent. They were asked about this burning problem of workers but failed to answer logically. Leaders replied passively to avoid contradictions. They said that this was worker's personal matter and didn't fall into their jurisdiction. On the other hand the concerned officer has taken it as a serious IR problem. On their level they are making the workers aware about the far reaching consequences. Management has done some sincere effort to solve this problem between workers and moneylenders unofficially. In North Searsole Colliery this problem is getting momentum day by day. Due to high rate of absenteeism the management now awake from long sleep.

Social justice for these workers is like a myth<sup>7</sup>. Both the work place and home become unbearable for them. Neither they could remain silent nor could they cry. It is a paradox in which the workers become the worse victim of permanent indebtedness. Ultimately workers lose the right to work with dignity and right to look after the family freely<sup>8</sup>. Here one unwritten constitution works where no social justice functions according to the provision of law and the writ of the moneylenders runs here. An individual become puppet of another individual. It is said that the social justice is the guardian and protector of the interest of the socially handicapped, disable, poor, downtrodden and deprived section of people. The workers are in dilemma. Dilemma doesn't only exist outside or externally as has already been mentioned but dilemma resides within also. One-side workers feel inferiority complex within themselves, on the other side they find no place to redress their grievances. Taking loan or lending money on interest is not the violation of social



justice. But social justice is violated when any one takes the advantage of weakness of another. When normal life is threatened by unwanted social elements, when life becomes burden, then the social justice seems to be a futility. From interaction one person revealed that he couldn't die unlamented, because if he remains alive, moneylender will not spare him to live peacefully under any circumstances. If he dies the family has to bear the burden of loan<sup>9</sup>.

Thus the darkness of coal mining industry remains enveloped by dark. Everybody knows but no initiatives have yet been taken to eradicate this problem<sup>8</sup>. The problem in context is dynamic and multi-casual. From the worker's side awareness is required and from the administration side a vigorous proactive role should be initiated to prohibit such immoral and inhuman business. Colliery authority should simplify the loan sanction process and provide adequate amount of loan to meet up the urgent demands of its workers. The cases of those unfortunate drugs addicted and money abuser should be handled with sensitivity and sympathy. The help of NGO's may be sought to bring about a solution to the burning problem<sup>10</sup>.

In Eastern Coalfields Ltd we can comprehend the present aspect of industrial relation adopted by the employer's end. These are promoting and developing amiable labour-management relations. They are enhancing the economic condition of the employees by improving salary, benefits and by helping the employees in developing sound financial plan and regulating the production by diminishing industrial conflicts through legal control. The administration has given endeavor to socialize the industries by providing an opportunities to the personnel to have a say in the administration and decision-making. The executive is also keen to improve upon workers skill with a view to solve their problems through mutual negotiations and consultation thereby sustaining industrial democracy<sup>11</sup>.

In West Bengal employers' associations are desirous of associating themselves with different administrative agencies taking into consideration the general, social, public and economic issues affecting employers and workers relations. In West Bengal, Eastern Coal Fields Ltd has taken part in developing many rural projects in the surrounding villages such as community development in the form of constructing community well, clubs, hospitals, schools, rural roads and play grounds through CSR fund<sup>12</sup>. The ECL administration has extended amenities of electrification in many villages. A good percentage of coal mines workers reside in the surrounding villages of the mines who continuously share their views with the masses of coal mining society. All these happened for very good industrial relation.

Land degradation and consequent land loss is the unique type of environmental effect associated with mining and is generally not encountered in this scale in any other industrial activity<sup>13</sup>. Opencast mining in scale and in intensity creates most severe form of land degradation and therefore, coalfield communities all over the region hold strong views against open casting as mining operations. In India the coalfield community's resistance towards land acquisition for an opencast project has delayed the starting of many projects. Such resistance has been most intense in the state of west Bengal<sup>14</sup>. A number of opencast projects in west Bengal including '*Sonepur Bazari*' opencast project is considerably delayed because of the local citizens' resistance toward the land acquisition. The reason of such resistance from coalfield community being most intense in West Bengal may be understood from a perusal of the history of Indian coal mining itself<sup>15</sup>. The industry and the government should keep this possibility in mind and should devise schemes to fulfill local aspirations.

It is a difficult task to estimate the number of farmers and agricultural workers displaced or affected due to land loss and land degradation. From the relevant data it is revealed that in *Satgram* area alone the number of cultivators decreased from 4103 in 2000 to 1753 in 2010, which means a decrease in cultivators of 2350 in a span of 10 years<sup>16</sup>. It may be noted that in *Asansol*, *Salanpur* and *Katras* development blocks (all located in coalmining area) there have been a decrease in number of persons employed in agriculture by approximately 3300, 3500 and 2600 respectively over a period of ten years (2000-2010) there has been increase in agricultural employment in non mining areas. In actual terms, it is not that a particular group of agricultural labours become completely redundant, but the partial loss of occupation pervades in the agricultural labour class<sup>17</sup>.

## Conclusion

Indebtedness is a social stigma. It neither allows people to live peacefully nor does allow dying peacefully. The practice of loan in North Searsole Colliery is not only illegal but also inhuman. Providing loan with high interest rate is a manifestation of cruel capitalistic culture. It's exploitation against humanity. Few clever persons are taking advantages of the simplicity and weakness of workers. Most of the workers who have taken loan from moneylenders belong to SC and ST section. They are lagging behind on the social ladder. Gradually the borrowers get into the trap of the moneylenders. However those fortunate who could manage to pay off their loan completely could not find a place in the process of further sustainable social development. They couldn't socially be rehabilitated. Those who are still in the service are limping with the burden of interest and are drifting in the darkness. Scared, physically assaulted and mentally humiliated sections seem to have no bright future. Social justice appears to be making a mockery with the fate of these unfortunates. However no formal steps have been taken so far by the competent authority to stop this malpractice going on inside the colliery. Few formal complaints have been recorded but due to invisible reasons concrete action to stop this business not yet been taken.

Another important issue is dealt with importance regarding mining induced displacement. Mining has degraded the land not only by denuding it of its forest cover, and choking up the natural drainage lines, but has also destroyed the agricultural potential of this region. The human dimensions of these physical impacts have been marginalization of the poor tribal and scheduled caste groups from the mainstream, formal economy, displacement of peasantry, the growth of small scale, informal industries, and illegal coal mining under local initiative. A degraded environment has fore closed alternative employment opportunities especially in the forestry and agricultural sector, leading the poor people to unlawful activities. These two bifocal problems should be taken seriously otherwise in near future insurgency may breakdown from the employee side from inside Coal India and outbreak by the local people may happen.

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## **From a Military Fortification to an Olympic Capital: a Historiographical Survey of the History of the Formation and Development of Greater Sochi**

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### **Abstract**

This survey article examines the historiography of the history of Greater Sochi from antiquity to the time of its becoming the capital of the 2014 Olympics. The author provides a periodization and has summarized literary sources. In addition, the article characterizes the area's evolution into the Olympic Games host city.

**Keywords:** Sochi-2014; Olympic capital; historiographical survey

### **Introduction**

Historiographical interest in the history of the making and development of the Olympic Games host city Sochi is associated with at least two quite obvious circumstances. On the one hand, it is due to the spirit of Olympism declared by the IOC, a component part whereof is popularizing the historical-cultural legacy of the territory wherein the Olympic Games are going to be held. On the other, it is the long-felt need for it to be conceptualized by national research practice, which over the last ten-fifteen years has had more than one "theoretical-methodological turnaround".

### **Materials and methods**

In writing this article, the author relied on books and magazine publications dedicated to the historical-cultural legacy of the Olympic Games-2014 capital Sochi.

### **Discussion**

Attempts at systematizing Sochi's historiography have been made by various authors and for various purposes. In the majority of cases, this has been done in preparing thesis and monograph studies. Note that the first generalizing historiographical work on the subject was an article by B.Ye. Shchetnev, wherein he examined the city's history from the time the first Russian fortification was founded to the time it gained the status of the capital of the Winter Olympic Games [1]. In this article, the author makes an attempt to examine publications that characterize the history of the development of Greater Sochi over the period from antiquity to the present.

It is most logical to examine the history of the issue under study in chronological order, with the following periods standing out for us to consider:

1. Sochi in antiquity (from the Dolmen civilization through to 1836);
2. Ante-revolutionary history (1837-1917);
3. The period of the revolution, the Civil War (1917-1922), and the peace-time stage (1922-1941);
4. The Great Patriotic War (1941-1945);
5. The post-war Soviet period (1945-1991);
6. The present-day Russian period (1991-2014).

### **Results**

**Sochi in antiquity (from the Dolmen civilization through to 1836).** Characterizing this period, we must note that it includes the Dolmen civilization of 2400-1700 B.C., the Ancient period, and the Middle Ages period. This might be one of the most poorly researched periods of Sochi's history. The Dolmen civilization has been mentioned in the works of V.L. Ksenofontov, N.V. Didenko, B.A. Tarchevsky, and A.A. Guseva [2]; the classification of Black Sea dolmens has been looked into by A.A. Pergat and A.A. Cherkasov [3]. Descriptions of atsanguars on Mount Aibga (Krasnaya Polyana) have been provided in the work of V.L. Ksenofontov and N.V. Didenko

[4]. A description of primitive dwelling sites in the territory of Greater Sochi has been attempted by A.M. Mamadaliyev [5-6]. Medieval defense architecture has been examined by O.V. Natolochnaya, N.V. Didenko, A.S. Solod'ko, and V.L. Ksenofontov [7-9]. Temple architecture has been addressed in the works of I.A. Ermachkov and A.M. Zaitsev [10].

**Ante-revolutionary history (1837-1917).** During this period, in the territory of Greater Sochi there occurred major social processes and upheavals, among which of defining significance was the making of the Russian military presence, the Caucasian War, the Russian colonization waves, and Sochi's development as a resort.

**The Caucasian War.** The Caucasian War in the region began in 1837-1840, when there were set up here four Russian Black Sea coastline outposts, namely the Holy Spirit (Adler), Alexandria, Golovinsky, and Lazarev fortifications. In the modern Russian period, this topic has been researched within the context of the history of Sochi, Black Sea area studies, and the Caucasian War by A. Shchadrin and P. Golubev [11].

Later on, starting in 2005, the subject of the making of the Russian military presence became a major item of study for scientists at Sochi State University for Tourism and Resort Business. Thus, in 2005 there was published a monograph by A.A. Cherkasov entitled "Essays on the History of the First Russian Fortification on the River Socha-Psta (1838-1854)" [12], and already in 2006 under the editorship of Professor V.Ye. Shchetnev there was published the first volume of the collective monograph "Essays on the History of Greater Sochi". The volume covered the period from 1838 to 1922 [13].

After that, there were published some more magazine articles on the issue: "Sochi in Wars: A Historical-Statistical Investigation" [14] by A.A. Cherkasov, "A Glance into an Epoch: Admiral Lazarev's Landing Operations" [15] by V.B. Karatayev and A.A. Cherkasov, "To the 170<sup>th</sup> Anniversary of the Resort-City of Sochi: A History of the Issue" [16] by A.A. Cherkasov, "Fort Golovinsky: From a Landing Operation to Creation of a Fortification (1839)" [17] by V.B. Karatayev and A.A. Cherkasov, and others [18].

In 2009, there came out the materials of a study by V.B. Karatayev and A.A. Cherkasov entitled "The Making of the Russian Military Presence at the Black Sea over 1837-1840 (through the Example of the Territory of Greater Sochi)" [19]. This work for the first time illustrated in a systemic fashion the process of creation of Russian fortresses and examines combatants' life in the tough conditions of the Caucasian War around the Black Sea area.

Of significance to the study of Sochi's history is the history of the Ubykh people, who inhabited the territory of Greater Sochi's present-day Central District. The history of Black Sea mountaineers, the Ubykhs in particular, has been explored by A.A. Cherkasov, M. Shmigel, V.G. Ryabtsev, V.S. Molchanova, L.G. Polyakova, and others [20-26].

**The colonization of the territory of Sochi Okrug within the Black Sea Governorate and the development of the faubourg of Sochi.** 2000 saw the release of one of the first books on the history of Sochi Okrug and the faubourg of Sochi – it was a monograph by I.A. Tveritinov entitled "The Social-Economic Development of Sochi Okrug in the Late 19<sup>th</sup>-Early 20<sup>th</sup> Centuries" [27].

After the release of the monograph by I.A. Tveritinov, there came out a host of magazine publications based on the ante-revolutionary periodical press. Among these works, we can point up the article "The Resort of Sochi during the Ante-Revolutionary Period: The Social Features of Local History" [28] by Ye.E. Rozhko and A.A. Cherkasov, the article "The Black Sea Governorate in the Early 20<sup>th</sup> Century: Revisiting the Activity of Internal Affairs Bodies" [29] by A.M. Zaitsev and A.M. Mamadaliyev, "The Resort of Sochi (1874-1917): Resort and Tourism Industry Facilities" [30] by I.A. Yermachkov and A.A. Cherkasov, "The Economy and the Resort: Food Supply in Sochi (Ante-Revolutionary Experience)" [31] by A.A. Cherkasov, "Historical Experience: Sochi's Financial and Taxation System in the Ante-Revolutionary Period" [32] by I.A. Tveritinov, "Revisiting the History of Scientific and Charity Societies in the Faubourg of Sochi in the Early 20<sup>th</sup> Century" [33] by A.A. Cherkasov, "The Activity of the Sochi Experiment Station: The Ante-Revolutionary Period" [34] by N.Ye. Markelova and A.A. Cherkasov, "The Center and the Outskirts: Cultural Life in the Faubourg of Sochi over 1894-1917 (Based on Materials from the Periodical Press)" [35] by A.A. Cherkasov, "The Center and the Outskirts: Sochi during the Period of the Russo-Japanese War" [36] by A.A. Cherkasov, "Honorable Citizen of the Faubourg of Sochi Count Illarion Ivanovich Vorontsov-Dashkov" [37] by A.A. Cherkasov, "The Center and the Outskirts: Providing the



Faubourg of Sochi with Essential Goods (1902-1917)” [38] by A.A. Cherkasov, “Industry and the Workers’ Issue during the Reign of Emperor Nicholas II (1894-1917) (through the Example of the Faubourg of Sochi)” [39] by A.A. Cherkasov, and “To the 100<sup>th</sup> Anniversary of the Sochi Periodical Press: Its Making” [40] by L.G. Polyakova and A.A. Cherkasov. The article “The Private Healthcare Institution of Dowager Empress Maria Feodorovna for Ladies with Impaired Health” [41] by L.K. Merkulova and I.I. Kucherova looks into the creation and activity of the institute of noble ladies with impaired health in the territory of Sochi.

Issues related to the colonization of Sochi Okrug have been examined in the works of O.V. Bershanskaya, I.A. Fedorova, and D.I. Saprykina [42-43]. Of no less significance to the colonization of the Black Sea coast was the organization of lines of communication, the roads being the major lines of communication at the time. Issues related to road construction have been explored by V.G. Ivantsov [44-46].

The subject of World War I warrants particular consideration. This subject has been explored in-depth by L.G. Polyakova and A.A. Cherkasov [47-53], who have examined the activity of charity societies in Sochi’s territory and the behavior of minorities in the tough conditions of military confrontation and made consideration of the population’s patriotism and the work of the Red Cross.

The topic of resort construction in the ante-revolutionary faubourg of Sochi has been addressed by I.A. Tveritinov and T.V. Samarina, who have examined the organizational and legal aspects of this activity [54]. O.V. Kirichenko and A.A. Cherkasov have dedicated an article to the genesis of the transport system of the faubourg of Sochi [55-56].

2009 saw the release of the monograph “The Center and the Outskirts: Sochi during the Reign of Emperor Nicholas II (1894-1917)” [57] by A.A. Cherkasov. Based on materials from the regional periodical press, the monograph examines all the major landmarks in Sochi’s social history during the reign of the last Russian emperor Nicholas II. In addition, the authors devote much attention to both regional and all-Russian issues faced by society.

The first Russian revolution in the territory of Greater Sochi has been explored in the works of K.V. Taran. In a considerable number of his works, the author has analyzed the reasons behind the participation of the rural residents of Sochi Okrug in the armed uprising in December 1905-January 1906 [58], the separatism of Georgian social-democrats in the early 20<sup>th</sup> century in the territory of Sochi Okrug within the Black Sea Governorate [59], the history of the peasant uprising in the faubourg of Sochi (1905-1906) [60], the reasons behind the participation of Sochi Okrug’s rural residents in the revolutionary movement in 1905 [61], as well as the role of the Russian province amid the genesis of multi-partisanship (October 17, 1905) (through the example of Sochi Okrug) [62] and the public-political movement in the Black Sea Governorate during the period of the First Russian Revolution [63].

Concluding the characterization of the period, we would like to draw your attention to the obvious mismatch between the degrees to which the period’s different time stages have been studied. Thus, for instance, little attention has been given today to the subject of the Russian colonization of the Black Sea area, while there has been much interest in the city’s history around the turn of the century (the late 19<sup>th</sup>-early 20<sup>th</sup> centuries). This must be due to the overall situation in the development of historical knowledge itself, which is gradually moving away from the banality of perceiving the past, and its mastering of a new corpus of historical sources that enable us to explore smaller quantities of the flow of the historical process in all their entirety and ambiguity.

**The revolutionary period, the Civil War (1917-1922), and the peace-time stage (1922-1941).** Defining events of national history in the time period under examination were the civil confrontation and arranging peaceful life upon its conclusion (it included, in chronological order, the New Economic Policy, collectivization, famine, industrialization, and political repressions). This was a time of success and upheavals for Greater Sochi as well, where along with the All-Soviet rural catastrophe there were taking place Udarnaya Stroika (implementation of model construction projects) and the creation of the Soviet resort.

**The Civil War.** The civil confrontation in the region’s territory had its distinctive characteristics. In Sochi’s territory, political opponents assumed power many times. In the Black Sea area, compared with the rest of Russia’s regions, there were not only the so-called Whites and Reds – the Georgian Mensheviks and the Greens also made their contribution to the region’s diversity. Professor V.Ye. Shchetnev notes: “If during the Soviet period scholars viewed the regional

characteristics of the Civil War as the Bolsheviks' struggle against the Whites, in modern historiography there has occurred a complete shift and the topic of the peasant (Green Army) movement has gained traction" [64].

The peasant movement in the region's territory during the Civil War in Russia has found reflection in monographs by A.A. Cherkasov [65]. In these works, the author has managed to bring to light and analyze the reasons behind peasant antagonism in relations between the Whites and Reds [66-69]. The author has also examined the activity of the only peasant polity during the Civil War – the Committee for the Liberation of the Black Sea Governorate [70-74] – and its armed forces – the Peasant Militia [75].

In 1920, after the Bolsheviks established their power in the territory of Kuban-Black Sea Oblast, which incorporated the city of Sochi as well, there began the Minor Civil War [76-80]. This time around, the Bolsheviks had to face the united White-Green opposition. Major hostilities had been taking place up until December, 1922. The Bolsheviks employed all measures to instill order: from propaganda action to the mass Red terror (including hostage-taking). It is hostage-taking that A.A. Cherkasov has dedicated his book "Hostage-Taking as a Means of Acting on the White-Green Opposition in Kuban and the Black Sea area over 1921-1922" [81-82] to. In the book, Cherkasov provides a rationale for casualties among the opposition and the local population, which resulted as a consequence of using this instrument for pressure. Concurrently, S.R. Sirotiyuk has examined the organization of the process of de-kulakization of wealthy peasants and serednyaks (medium welfare peasants) in the territory of Greater Sochi [83].

**The peace-time stage.** The introduction of the New Economic Policy (NEP) in the Black Sea area crowned the process of the region's shift to peaceful life. O.V. Bershadskaya has looked into various aspects of life activity within Sochi during the NEP years. Thus, for instance, the author has examined the demographic situation in Greater Sochi and the city's agricultural production [84-86].

Some of the aspects of activity within the system of national education have been addressed by L.K. Merkulova, Ye.S. Bugayeva, I.A. Yermachkov, and A.A. Cherkasov. Thus, for instance, in their article "The Inner World of a Graduate of the Nine-Year Sochi First Soviet School in 1928: Bidding Farewell to School" the authors have looked into the inner world a schoolchild graduate [87-88]. Later on, this topic was examined in the materials of the study "The Inner World of a Graduate of the First Soviet School in 1928 in the City of Sochi" [89]. An article by I.A. Ermachkov and A.A. Cherkasov has looked into the process of the making and development of physical training in the city of Sochi [90].

**Model construction.** As of 1934, the territory of the Sochi-Matsesta district was declared a model construction area. This was the time when the construction of multiple sanatoria and recreation-and-retreat centers began. This topic has been explored in the articles of T.A. Samsonenko, which address the beginning and development of construction of the Stalin health spa in Sochi's territory in the 1930s [91-92].

The history of Sochi, including the Soviet period, has also been examined by I.N. Markaryan [93]. The construction of a sanitarium-and-resort complex in Sochi led to an improvement in resort services for vacationers. To administer control of this service sphere, the Resort Directorate was founded. The activity of the Resort Directorate has been explored by O.V. Natolochnaya [94]. Yu.B. Rumyantseva has dedicated a work of hers to the development of Sochi's transport system over 1920-1940 [95].

It should be noted that the period, starting in the early 21<sup>st</sup> century, saw a surge of interest in the study of Greater Sochi's social-economic history. Much attention was given to the study of the Civil War. However, there still remain narrative gaps when it comes to exploring the process of arranging peaceful life in the area. Thus, for instance, the period of political repressions in the territory of Sochi has not been getting any interest among professional historians and is yet to be researched.

**The Great Patriotic War (1941-1945).** Modern historiography on the Great Patriotic War is diverse, which is associated with researchers' interest in sources not sought after before. Historiography on this subject can be divided into two major topics: Sochi as the hospital (including the operation of the rear) and warfare in the mountains. Today, materials from federal archives (The Central Archive of the Ministry of Defense, the State Archive of the Russian Federation, etc.) are quite actively getting into scientific circulation, with due regard given to the reminiscences of veterans and people who worked in the rear, as well sources of personal origin, including letters and diaries.

Arguably, one of the first works on the history of defense of Sochi was "A Thunderstorm Over Grozny" [96] by B.D. Tskhomariya, a Sochi area studies expert and participant in the Great

Patriotic War. Based on materials of personal origin, the author attempts to dissect the complex process of the development of hostilities in the so-called forest Caucasus area. In addition, the work contains the memoirs of commander of the 20<sup>th</sup> mountain division Colonel Turchinsky.

In 2008, the topic of defense of the city was addressed by A.A. Cherkasov in his monograph “Warfare in the Mountains: Pages from the History of Defense of Sochi (1942-1943)”. As the primary source, the author engages documents from the Central Archive of the Ministry of Defense, namely 24-hour records of the activity of the 20<sup>th</sup> mountain division of the Red Workers' and Peasants' Army [97]. Besides, the author has also explored the Sochi rear (the Sochi hospital base, the guerilla movement, the mopping-up battalion, and local air defense [98-104]).

In exploring the regional characteristics of the Great Patriotic War, rapt attention has been given to the activity of the people's militia and the phenomenon of military mythization. These topics have been addressed by A.A. Mamadaliyev and I.Yu. Cherkasova [105-106]. Thus, for instance, I.Yu. Cherkasova has looked into some of the distinctive characteristics of the historic episodes of the Moscow battle and the battle for the Caucasus.

L.G. Polyakova has dedicated a work of hers to the study of the period's periodical press, including that dealing with the Great Patriotic War. The author has managed to trace its evolution in the territory of Greater Sochi over the period of 1920-1985. L.G. Polyakova has identified the characteristics of the Sochi periodical press during the Great Patriotic War [107].

Of great interest to historians has been the topic of Sochi as a hospital city. Thus, for instance, in his work “Revisiting Certain Aspects of the Operation of the Sochi Hospital Base (1941-1945): Its Periodization and Effectiveness” A.A. Cherkasov relates that during the toughest period of the battle for the Caucasus the city managed to take on up to 40% of the sanitary casualties of the entire Caucasian front [108]. It was this, in the author's view, that Sochi's and its citizens' feat of benevolence lies in. The topic of the history of the Sochi hospital base has been addressed by O.V. Natolochnaya [109-110], L.V. Radichko, V.I. Chyorny [111], A.A. Cherkasov [112-113], N.A. Kulikov [114], S.I. Linets [115], and others. Nevertheless, today there still remain many pages about the activity of Sochi hospitals, among which is the issue of the “manpower famine”. It is known that professional human resources were mobilized to the front. As a result, hospitals were stricken with a manpower famine, which would last up until 1945.

#### **The post-war Soviet period (1945-1991).**

**The restoration of the economy.** Substantial work on the study of Sochi in the post-war period has been carried out by O.V. Natolochnaya. By engaging archive sources and sources of personal origin (interview materials) the author has managed to bring the subject to light in a number of publications.

It is known that Sochi was not actively involved in hostilities and was not subjected to mass bombing by the German Luftwaffe. Nevertheless, the process of Sochi's shift to a peaceful footing in the post-war period was quite complicated. Thus, for instance, there were major issues in terms of the demographic situation [116]. Besides, we have to remember that shifting the city's hospital base to a peaceful footing [117-122] was a really tough task to accomplish. The city had no less trouble resolving pre-war issues relating to capital construction, e.g. construction of railroad and marine passenger terminals, as well as works related to shoring up the coastline around the city's littoral area [123]. O.V. Natolochnaya has also looked into the subject of ensuring public order in Sochi as a city with a restricted entry at the time [124-127].

**The Khrushchev Thaw period.** In 1953, N.S. Khrushchev was put in charge of the USSR and began major reforms. In just a 5-years' time, one could observe changes in the former “nomenklatura” resort, Sochi, as well. Thus, for instance, the city started to exhibit an informal attitude towards fashion. The process of the genesis of informal movements among Sochi youth has been examined in an article by Ye.S. Gargolina and A.A. Cherkasov. The authors look into the phenomenon and specific manifestations of style hunting in the late 1950s-early 1960s [128]

1961 was marked with major administrative-territorial acquisitions for Sochi. The Adler and Lazarev districts were incorporated into the city. As a consequence, there emerged one of the world's longest cities – Greater Sochi, its length along the Black Sea being 109 km. Concurrently, they began to implement the Second General Plan for the development of the resort as an All-Union health spa. This topic has been given substantial attention in modern historiography. The formation of the Greater Sochi sanitarium-and-resort complex has been explored in depth by A.M. Zaitsev [129-131].

Much attention has also been given to the study of the city's social life. Studies have been conducted by N.A. Kulikov [132] and A.M. Zaitsev [133]. An attempt to trace the evolution of the local periodical press has been made in a work by L.G. Polyakova and A.A. Cherkasov [134]. The authors have discovered that during the Thaw period the periodical press changed considerably, which, for instance, was reflected in the way current local events were presented in newspapers. Later on, during the stagnation period under L.I. Brezhnev, there was an attempt to toughen the country's regime, but it was now impossible to change society in a major way. In 1985, the charge of the country was assumed by M.S. Gorbachev, who embarked on the path of democratic reform and kicked off the **Perestroika period**.

The Perestroika period vividly demonstrated the waning years of the Soviet empire. Democratic winds and the introduction of market relations had a substantial impact on both the country and the city. It was the Perestroika period that Sochi saw a peak time for Soviet vacationers in. In 1988, the number of vacationers at the resort hit the highest level – 5.2 million people. The subject of life in Sochi during Perestroika has been given substantial attention by S.D. Bagdasaryan and I.A. Ermachkov, who have provided quite an in-depth account of the city's social-economic development in that period [135-143].

Researchers have not overlooked the subject of the resort's ecology either. At that time already, much attention was given to the issue of a lack of waste treatment facilities in the city. Needless to say, the issue of waste water was a major issue for virtually all districts of Greater Sochi. This topic has been addressed by I.A. Ermachkov and A.A. Cherkasov [144]. I.A. Ermachkov has conducted a separate study into the issue of emergencies in the territory of Greater Sochi, in which the author has examined natural disasters and ways of dealing with them [145].

**The present-day Russian period (1991-2014).** This period is one of the more poorly investigated. There are many reasons behind this. One of them is that the timeframe between its beginning and end is quite short. As a consequence, many documents have not made it into archives yet, which creates understandable difficulties for researchers. Nevertheless, the topic has been addressed by such researchers as I.A. Tveritinov [146-147] and V.G. Ivantsov [148].

After 1991, quite a strenuous effort had been made to create a new political culture of society in modern Russia. This subject has been examined through the example of the political culture of a Sochi resident in a work by S.V. Petrova [149].

2007 saw the occurrence of another significant landmark event in Sochi's history, which determined a new vector of the city's future development. The city was chosen to host the 22<sup>nd</sup> Winter Olympic Games and the 11<sup>th</sup> Paralympic Games-2014. The topic of the historical-cultural legacy of the area of Olympic facilities has been explored by A.V. Guseva, A.M. Mamadaliyev, O.V. Natolochnaya, and A.A. Cherkasov [150]. The authors have managed to bring to light the civilizational history of the territory of Greater Sochi from antiquity to the present. A result of this study is the creation of a portrait of the city's local (native) resident inclusive of the temporal space.

## Conclusion

The examined period of the history of Greater Sochi has been investigated in modern historiography with varying degrees of intensity. The periods covered the best are the post-war period of Stalinism and the 1960-1991 timeframe, while there is a total lack of works dedicated to the study of the period of the city's history from 1953 to 1959. Besides, there is also a lack of research into the modern period of the city's development, which is quite a rich one. Summing up, we would like to note that the active study of the city's history is directly associated with the activity of the Sochi historical school, which had been forming for about 20 years within the Sochi branch of Herzen Russian State Pedagogical University and then continued its development at Sochi State University for Tourism and Resort Business.

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## **Influence of Product Packaging on Purchase Decisions**

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### **Abstract**

The aim of this research is to investigate the role of packaging on consumer buying behavior, to find out the relationship between package of product and its selling. How big is the importance of package in marketing communications, especially in the point of sale and how much does it influence consumer's purchase decision. The consumer buying behavior is dependent on the packaging and on its features. Packaging elements like color, background image, material, font style, design of wrapper, are taken as predictors.

Data for this study were collected through the questionnaire as a method of qualitative research. 300 questionnaires were obtained in giving the final result of this research. Predicted outcome of research is that package performs an important role in purchase decisions.

**Keywords:** Consumer Buying Behavior; Packaging; Purchase Decision Process.

### **Introduction**

In today's constantly changing business environment and consumer purchase desires, packaging plays an important role. Through the history primary purpose of packaging was to protect the product, but currently packaging is being used as a tool for sales growing and attracting potential customers. Companies are interested in packaging as a tool to increase their sales and to reduce promotional costs.

A good packaging helps to identify product to the consumers. Packaging is used for more easily delivery and for protection and enclosure of the product. Many companies try to make packing original and in the way that it will satisfy consumers. They also use for the promotional purposes, to make the product differentiate from other brands. Packaging is used for marketing communication purposes and it plays an important element which influences the purchase behavior of the consumers. Through verbal and pictorial symbols packaging can inform the potential buyers about the content of product, property, usage, advantages and risks.

By investigating peoples' perceptions about the role of packaging on consumer buying behavior this study will help marketers to realize in which way the packaging influences perceptions of consumers while buying a certain product.

This study analyzes the role of packaging on consumer buying behavior through existing literature and researches done among students in BiH. In following sections basic definitions of key terms will be defined, historical background of this marketing strategy, the reasons why packaging influences the sale of product as well as research objectives and hypothesis will be presented. The way of collecting data for this study will be presented in methodology section. For the methodology section, seven hypotheses will be tested. Data will be analyzed by performing descriptive statistics. As last part of this study in conclusion section different suggestions will be given for marketers in order to improve quality of the service as well as way of packaging.

### **Literature review**

In the literature, there are quite many studies which are done in the area of packaging. In the article "Consumer reaction to new package design" (2012) Holmes and Paswan say that a little is known exactly about the impact of the consumer's experience with the package on the evaluation of the project itself.

Concerning the previous researches, it can be seen that not so many studies have been done related exactly to the package design perception and direct customer experience with the package.

However, the package plays an important role because it tells the consumer the information about the product as well as the quality of product.

Rettie & Brewer (2000) state that package design is one of the most significant parts of product strategy. Approximately 70 percent of all purchase decisions of goods are made at the point of purchase. According to this we can conclude that the package itself is the only marketing communication the consumer may receive while evaluating the product.

Packaging plays a critical role in the purchasing decision. Silayoi and Speece (2007) say that in cases when the consumer is undecided, the package becomes an important in the buying choice because it communicates to the consumer during the decision making time.

There are various factors that influence the buying behavior of consumers such as: Packaging Color, Design of Wrapper, Printed Information, Background image, Packaging Material, Innovation.

a) **Packaging Color**

It has been proved that colors have strong effect on perception and therefore colors of packaging can be important. The right choice of colors is an important factor in creating the impression needed to influence brand and product selection (Gofman 2010). Color of packaging has an important role in making apart one company product from other. Cheskin (1957) says that the selection of the colors and color combinations is a necessary process for creating a good design package. Color is a key element of design due to the fact that it is usually vivid and memorable. The package color can have a significant effect on consumers' ability to recognize the product. Packaging color draws attention of the consumers. Every color creates different meaning according to the consumer perception. White and black color are used for creating power, red for energy, blue is used for trust, green for balance.

b) **Packaging Material**

Material of packaging is important element which prevents the product from loss. High quality material will attracts customers more than a low (Shah, Ahmed, & Ahmad, 2013).

c) **Font Style**

Font is important element of packaging which attracts the customer attention. Packaging information can create contrary results. It can lead to misleading or inaccurate information through small fronts and dense writing styles which are used on the package (Deliya, Parmar, & others, 2012).

d) **Design of wrapper**

Ulrich R. Orth (2009) "Packaging is used for identification of the product". It plays an important role in attracting the consumer. Eye-catching graphics make the product stand out on the shelf and attract the consumers. Graphics can affect through colors and printed lines on the package on which different signs and symbols are located. Holograms and combinations of various materials can encourage consumers to touch the package, thereby inspiring them to try the product (Rundh 2009).

e) **Printed Information**

Printed information contain all the information related to the product quality, price, description which help to identify the brand. This helps customers to make the right decisions and to purchase the product. It is one of the most visible parts of product and important element of marketing mix (Shah et al., 2013).

f) **Background-image**

Goldberg (1999) said that image on the product is important so that they increase the attention and increase familiarity with the particular product. Background image is the image in that is created in the mind of the customer which help to identify the brand of the product.

Pictures on the package in form of attractive situations (mountains, beaches, luxury houses and cars) can assist in triggering lifestyle aspirations (Rundh 2009).

Many cosmetic companies design the background-image in the order to represent the image of richness, luxury and exclusivity.

g) **Innovation**

Bringing innovation in the packaging design also increase the value of the product like easy open, recyclable, easy store, breakability, child proof, eco-friendly, etc. in the consumer mind (Shah et al., 2013).

## Research hypothesis

**H1:** The Price is the factor that most affects the purchasing of product.

**H2:** Packaging material shows the quality of product.

**H3:** Color of packaging gains the attention at the point of purchase.

**H4:** Innovation in the packaging design increase the value of the product.

**H5:** People from age more that 22 observe Printed information while purchasing a product.

## Methodology

Data for the study were collected through a survey delivered to citizens of Sarajevo. A total of 300 questionnaires were distributed, but 250 of them were taken as valid. Questionnaire was consisted from 20 items. For analyzing the results of the research statistical data analysis has been performed, using statistical data analysis package SPSS. Data were analyzed by performing descriptive statistics. Results of these findings will be presented in following section.

## Objective

Objective of research study are:

- To find how much packaging impact on the consumer buying decision.
- Which factors are most convenient to influence consumer buying decision.
- Main objective is to find important elements of packaging which directly affect the consumer buying behavior.

## Sample Size

Our sample size of research is 250 respondents from which we have collect data.

Sampling Area: Sarajevo city

Sampling method: Sample Random sampling

## Results

In the following pages educational, national and gender structure of our respondents will be presented. After that hypotheses will be tested.

TABLE 1: Level of education of respondents

	Frequency	Percent	Valid Percent
Undergraduate student	161	60,3	60,3
Graduate student	65	24,3	24,3
Employed	24	9,0	9,0
Total	267	100	100

As we can see from table 1, there were 161 undergraduate students (60,3%) and 65 graduate students (24,3%) that we used in the sample for this study.

TABLE 2: Nationality of respondents

	Frequency	Percent	Valid Percent
Bosnian	169	63.3	63.3
Turkish	53	19.9	19.9
Other	27	10.1	10.1
Total	267	100	100



From the table 2 we can find information about subjects' nationality. Bosnians were again vast majority (63,3%), Turkish (19,9%), Other (10,1%).

TABLE 3: Gender of respondents used in the sample

	Frequency	Percent	Valid Percent
Male	119	44.6	44.6
Female	129	48.3	48.3
Total	256	100	100

For this study as a sample we used both, males and females. In table 3 we can notice that there were 119 male respondents (44,6%) and 129 female respondents (48,3%) used in the sample.

TABLE 4: Age of respondents

	Frequency	Percent	Valid Percent
0-19	51	19.1	19.1
20-22	108	40.4	40.4
More than 22	90	33.7	33.7
Total	267	100	100

From this table we can see that 40.4 % of respondents had age of 20-22. 33.7% had age more than 22, and only 19.1% had age from 0-19.

### **H<sub>1</sub> The Price is the factor that most affects the purchasing of product.**

TABLE 5 Factors that are mostly affecting purchasing of the products

	Frequency	Percent	Valid Percent
Brand	71	26.6	26.6
Design of package	60	22.5	22.5
Other	28	10.5	10.5
Price	91	34.1	34.1
Total	267	100	100

(26,6%) of the respondents said that the Brand is the factor that affects their purchasing behavior. (22,5%) said that Design of package affect their purchasing behavior. (34,1%) of them said that Price affects their purchasing behavior. So H<sub>1</sub> is accepted, according to citizens' opinion, price is the factor that most affects their purchasing behavior.

### **H<sub>2</sub> Packaging material shows the quality of product.**

TABLE 6: Packaging as a representation of the quality

	Frequency	Percent	Valid Percent
Strongly Disagree	12	4.5	4.5
Disagree	23	8.6	8.6
Neutral	74	27.7	27.7
Agree	75	28.1	28.1
Strongly Agree	66	24.7	24.7
Total	267	100	100

The percent of respondents which agree with statement (52,8%) is much more higher than percent of students which disagree with this statement (13,1%). So  $H_2$  is accepted, according to peoples' opinion, packaging material shows the quality of product.

**$H_3$  Color of packaging gains the attention at the point of purchase.**

TABLE 7: Influence of the packaging color

	Frequency	Percent	Valid Percent
Strongly Disagree	12	4.5	4.5
Disagree	21	7.9	7.9
Neutral	56	21.0	21.0
Agree	86	32.2	32.2
Strongly Agree	74	27.7	27.7
Total	267	100	100

The percent of respondents which agree with statement (59,9%) is much more higher than percent of students which disagree with this statement (12,4%). So  $H_3$  is accepted, according to peoples' opinion, color of packaging gains the attention at the point of purchase.

**$H_4$  Innovation in the packaging design increase the value of the product.**

TABLE 8: Innovation of the packaging

	Frequency	Percent	Valid Percent
Strongly Disagree	15	5.6	5.6
Disagree	29	10.9	10.9
Neutral	62	23.2	23.2
Agree	75	28.1	28.1
Strongly Agree	69	25.8	25.8
Total	267	100	100

The percent of respondents which agree with statement (53,9%) is much more higher than percent of students which disagree with this statement (16,5%). So  $H_4$  is accepted, according to peoples' opinion, Innovation in the packaging design increase the value of the product.

**$H_5$  People from age more that 22 observe printed information while purchasing a product.**

TABLE 9: Printed information

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total
0-19	2	5	11	15	18	51
20-22	10	14	35	30	20	109
More than 22	4	15	24	25	21	89
Total	16	34	70	70	59	249

The percent of respondents from age more than 22 which agree with statement (51,0%) is much more higher than percent of respondents which disagree with this statement (21,0%). So  $H_5$  is accepted, according to peoples' opinion, People from age more that 22 observe Printed information while purchasing a product.

### Conclusion

In nowadays the role of package has changed due to marketing environment and increasing changes in the consumer desires. Companies are interested in packaging as a tool to increase their sales and to reduce promotional costs. A good packaging helps to identify product to the consumers. The producers try to make packing original and in the way that it will satisfy consumers. Packaging is use for marketing communication purposes and they are the important element which influences the buying behavior of the individual. Through verbal and pictorial symbols packaging can inform the potential buyers about the content of product, property, usage, advantages and risks.

With investigating peoples' perceptions about the role of packaging on consumer buying behavior this study showed that there are various factors that influence the buying behavior of consumers such as: Innovation, Packaging Color, Printed Information, Background image, Packaging Material, Design of Wrapper of the product. But despite all these factors there is one bigger factor which always comes in front of all these, it is Price. Consumers are highly affected with the price of product while purchasing.

Another finding that can be useful information to marketers is that people from age more than 22 pay more attention on Written Information while purchasing the product. They are more interested in the content of the product than in appearance of the product.

Marketers should pay attention to all factors listed above because they all affect some target groups. For marketers, it is very important fact when creating advertising messages to population in BiH.

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## Irish Language as a Part of Cultural Identity of the Irish

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### Abstract

Language can be perceived as a crucial part of identity. Language enables to pass on experience which is vital for future generations. Language and culture are mutually interconnected. The principal aim of the article is analysis of the importance of Irish language in the context of cultural identity of the Irish. Specifically, we deal with the topical issues concerning language and identity referring to Crystal's theory of language death. Last but not least we also focus on the renaissance of Irish language in the Republic of Ireland dealing with selected official documents and strategies aimed at cultivation and preservation of the Irish language in the Republic of Ireland.

**Keywords:** language; identity; cultural identity; Irish language; language death; revival of Irish language.

### Introduction

Language can be perceived as a crucial part of identity, either of cultural, national or European one. According to Schröder language provides a fertile ground for identification, it is linked to collective consciousness (historical consciousness) [12]. Language enables to pass on experience which is also vital for future generations. There are many opinions about interconnection of language and culture. Crystal states that there are two points of view regarding interconnection of language and culture [2]. The first point of view is connected with the fact that there is a considerable identity between culture and language. Culture is expressed by language (held mostly by indigenous language speakers). The second point of view stipulates that there is limited identity between language and culture and that language is just an optional feature of ethnicity not an obligatory one. The second point of view also embodies the statement that even if people do not speak indigenous language, they can be part of community (that is also the case of the Irish who do not speak Irish language but still they feel like being part of Irish community).

Pombeni gives us a rather rhetorical question of what can be more unrelinquishable than language. He assumes that the language is drunk in a mother's milk without us actually knowing it emphasizing thus language as a primordial element [10].

### Language Death

As for the linguistic diversity and protection of regional and minority languages, one should also pay closer attention to the topic of language death mentioned by many authors [12]. In the words of Crystal, languages can be classified into several groups according to the number of their speakers and thus their viability [2]. Therefore, they are divided into viable languages, viable but small (Irish language), endangered languages, nearly extinct languages and extinct languages (Cornish and Manx languages). Weaker languages can be further divided according to Wurm into endangered languages with few or no children learning the language, seriously endangered, moribund languages and extinct languages [2].

Following Schröder language and culture are inextricably linked together although they should not be equated. When a language dies, then the culture of the people who speak the given language is also lost [12]. The language and culture can both die. The death of one of them implies the death of the other. Therefore, they are mutually interconnected and the artificial preservation (in museums and other, cultural institutions) cannot substitute the great loss of language. This is the case of the previously mentioned Cornish (spoken in Cornwall – situated in the western end of



England) and Manx (spoken on the Isle of Man) languages. The former became extinct in the 19<sup>th</sup> century and the latter in the 20<sup>th</sup> century (1891, 1974) [3].

In the case of the Irish language (also called Irish Gaelic), the language death was almost achieved by the English policy of supplanting the Irish language with English. Elizabethan officials in Ireland believed e.g. that Gaelic bred sedition [3]. Moreover, during the Victorian era, the Irish were viewed as backward and inferior. There were many stereotypes used depicting the Irish as wild, reckless, indolent which was hostile view towards Irish being based on negative Celtic Irish stereotype [9].

Furthermore, the Irish Gaelic, one of the two official languages of the Republic of Ireland, is considered by many as the supreme embodiment of independent Irish-Celtic culture. Nowadays it is threatened with extinction (belonging to a group of endangered languages). The Irish as well as other Celtic languages have got a few similarities together and one of them is connected with their geographical delineation which means that they are all confined to mountainous or coastal areas (Scottish Gaelic – Highlands, Irish Gaelic – Gaeltacht areas) which is also one of the reasons why it should be supported countrywide supposing that language and culture are conceived as part and parcel of an ecological approach towards society [12]. In this way, the term ecology is no longer confined only to biology and environmental studies but also to social sciences.

## **IRISH LANGUAGE**

### **Origin of the Irish Language**

Origin of the Irish Gaelic is connected with the arrival of the Celts on the British Isles. It became a written language in the period of early Middle Ages. It was even earlier than Latin which was dominant until 13<sup>th</sup> and 14<sup>th</sup> century. From that time on other national languages gained also dominant role. However, a great number of medieval languages declined like the Irish language or Welsh language etc., because of the policy of language homogenization which was realized since the 16<sup>th</sup> century as a consequence of central power of a ruler, centralism and bureaucracy. In such a way a ruler could perform absolutist efforts for unification which was realized by the policy of plantation i.e. migration and settlement of English in parts of Ireland and Wales [3].

The main aim of unification was to unite countries legally, religiously but also linguistically. This central language homogeneity equaled to one state language (in the case of Ireland it was the English language). Thus, the dominant nation speaking the dominant language was superior to other non-governing ethnic groups. It was also believed that dialects could be a danger for state organism. That is also one of the reasons why the Irish (as well as the Scottish) rebelled against language unification (assimilation) policy of the English. Therefore, for the Irish the language played not only a role of having a simple communicative function but also the symbolic one as well as the function inevitable for self-identification or more precisely for a contrastive self-identification of non-governing ethnic group against others [4].

Although the Irish language declined since the 17<sup>th</sup> century it is still part of ethnic identity of the Irish, even of those Irish who do not speak their original language anymore. The loss of the Irish language thus is not equal to the loss of their ethnic identity [5].

### **Renaissance of Irish Gaelic in the Republic of Ireland**

The national renaissance of Irish language in the Republic of Ireland has become of crucial importance for national and cultural identification of the Irish. As a consequence it acquired the role of an important subject on school and university curricula which was also helped by the state policy. People became gradually encouraged to learn the language. The knowledge of Irish has played a significant role during work selection procedures since then. The Irish language thus can be perceived as an important element in terms of cultural-identity fostering in Ireland. It means that the Irish language is intended to be transmitted to all parts of Ireland (in order not to be confined only to western coastal areas known as Gaeltachts) [12].

The Irish language nowadays is preferred by the Irish in many respects. Firstly, as it was previously mentioned, Irish language education is supported in Irish schools throughout the Republic of Ireland as well as in Northern Ireland. Secondly, the Irish prefer giving their children Irish equivalents of English names (Sean instead of John, Aine instead of Anne, Pdraig instead of Patrick, Cait instead of Kate, etc.), prefer their cultural traditions, feasts, cultural activities as

ethnic music, dance, newspapers, values, etc., which also demonstrates integrative – differential function of culture [6]. The preference of Welsh names instead of English ones is also typical for Wales [11].

As for the number of Irish speaker nowadays, it is approximately only 2 % or 40% if we take into account all the speakers of Irish (even those who state having just a partial knowledge of the Irish language) [8]. In the case of other Celtic languages revitalization in UK, it is described as having more or less just a kind of a local-patriotic intellectual character which might decline in the future [5].

### **Today's Support of the Irish Language in the Republic of Ireland**

Nowadays there are many organizations which support national and cultural identity of the Irish through the medium of Irish language cultivation and preservation. The two pivotal ones are Údarás na Gaeltachta and Foras na Gaelige. The first one, Údarás na Gaeltachta was established in 1980 and it is responsible for the promotion, cultivation and preservation of the Irish language in the specific Gaeltacht area with the final aim to keep the language viable for future generations. Another partial aims are connected with Irish language education. The members of the organization have developed many initiatives to support Irish language in pre-schools as well as in public through the medium of language courses and language services [19].

As far as the second organization is concerned, Foras na Gaelige is in charge of promotion of Irish throughout the whole of Ireland in both areas, namely the North and the South. It was founded in 1999. The aims of the Foras na Gaelige are similar to the previous organization and they range from promotion of the Irish language, support of Irish medium education to supportive projects and research activities in the given area [14].

Except for two main organizations, Irish language is also supported through broadcasting, namely it is the Irish language TV channel TG4, the radio called RTÉ Raidió na Gaeltachta and number of Irish language newspapers (Gaelscéal, Foinse, Saol, Nuacht24). Furthermore, a few sections in national (the Irish Times, the Irish News) and local newspapers are published in Irish language too [8].

As for education, it was mentioned previously that Irish language is obligatory subject at schools. Besides there are also schools in which education is carried out through the medium of the Irish language. Moreover, many universities offer unique study programs to students like the Irish language or Irish Cultural Studies and they also organized various courses for those who are interested in learning and improving the language (Galway National University of Ireland, Trinity College in Dublin).

Least but not least, there is a number of festivals held in Ireland which promote Irish language and culture such as Irish Language Week festival [18] or IMRAM (Irish Language Literature Festival) [15] and many others.

### **Official Documents Referring to the Status of the Irish Language**

As it is generally known, the Irish language has been declared as one of the official languages of the European Union which happened precisely in 2007 [8]. According to the Department of Foreign Affairs website, since granting the Irish language the same status as is being enjoyed by other Member States' languages, new arrangements must have been also accepted following the changed status of the Irish language which had been a treaty language before (since Ireland joined the EEC in 1973, the same year as UK did). These mentioned new arrangements for Irish are:

- „Knowledge of the Irish language is taken into account for the purposes of recruitment to the EU institutions
- EU regulations adopted jointly by the Council and the European Parliament will be translated into Irish
- Interpretation from Irish is also provided to meet needs at Ministerial meetings and at the European Parliament
- The nameplates in front of Irish Ministers and delegations now say “Éire Ireland” to reflect the new status of Irish in the EU also” [13].

In practice, the last arrangement has been adapted well in the Irish context which means that nameplates in the Republic of Ireland as well as road and traffic signs are translated into Irish while Irish language is having preference as the first official and national language which is why the Irish version is written as the first one. A few examples include the Irish version of Baile Átha Cliath for Dublin, Tulach Mhór for Tullamore or Corcaigh for Cork. Except for Irish versions of cities, towns or villages, other general signs situated in the vicinity of road system are also reflecting this recently attained status of Irish (Golf Gumann – Golf Club, Aerfort – airport, Iarnród Éireann – Irish Rail).

According to Department of Foreign Affairs website the fact that Irish language gained such an important status has brought not only joys but also sorrows since 2007 concerning realization of translation and interpretation services to and from the Irish language [13]. Mostly the translations and interpretations are focused on key documents published by EU's institutions while citizens have got right to address Irish and European institutions in Irish language and be responded accordingly through the medium of Irish language.

But there is still a long way to go when we take into account the problems with legal vocabulary, thus legal translation is very demanding and deserves time spent while searching for the best equivalent. However, help is not rare as there are many higher institutions like National University of Ireland (Galway) and Dublin City University which have undertaken the challenges of translation dilemma. One the one hand, the third-level courses and study programs aimed at Irish language or Irish cultural studies are good signs for future graduates and even this helps those enhancing adequate level of Irish to find excellent work opportunity in Irish and European workspace.

Furthermore, what is quite positive about acquiring official status of Irish language is the fact that European citizens have become acquainted with Irish language itself and with the importance of Irish language in cultural and national identity formation of the Irish. Moreover, there are a lot of materials published in Irish language (Europa website, through the medium of Irish Translation Unit) and many Irish cultural events are organized at the level of European institutions. Courses specialized at interpretation and translation services have been opened in the Republic of Ireland although, still there are not enough of professionally trained interpreters and translators who would be ready to carry out interpretation and translation services. Therefore, a special term derogation is used to put into light real interpretation and translations works at European level. This derogation was lifted in 2007, renewed in 2010 and will be discussed later in 2015 [17].

In short, the Irish language acquired a new status that inhabitants of the Republic of Ireland have been striving for long decades. On one hand, it brings many positives if we take into consideration increase of national awareness and strengthening of national and cultural identity of the nation, while on the other hand, it also carries certain challenges that not only the state and politicians have to cope with.

As being indicated in the 20-Year Strategy for the Irish Language 2010-2030, made by the Government of Ireland, the key focus of the strategy is to strengthen the position of the language within education system, while the transmission of Irish as a living language within family and between generations is critically important. The strategy is hugely in favour of creating a supportive framework and the opportunities in which Irish can be used on in a natural way within households and communities which is stressed to be important for all the areas, with Gaeltacht area (the area situated in the western part of the country in which predominant language spoken is Irish) taken as an exquisite example of special importance [20].

Thus, the strategy is aimed at reaching the status of bilingualism referring to knowledge of both languages, namely Irish and English, so the inhabitants are fluent in both of them. These aims create challenge not only for government but also for the people as it is up to them how they cope with the situation in the future.

Moreover, the Strategy is aimed not only at students and teachers (through developing their language fluency and accuracy) but also at family and the support of family in Irish language learning. The family, as it is well-known, is the cornerstone of society, so it plays a huge role in language acquisition of the child. Therefore, one of the areas which the Strategy tries to hit by instant support and help in leading children to Irish language speaking, is the area of family [20].

## Conclusion

Taking a step back, when facing discrepancies about the number of Irish language users, one must have a look at historical consequences that had a huge effect on the decrease of Irish speaking people, starting with potato famine of 1840s followed by vast emigration of the Irish people abroad. According to the *Mercator European Research Centre on Multilingualism and Language Learning* Ireland is still facing the emigration problem. On one hand, diaspora reduced the number of those Irish speaking migrants, returning home with non-Irish speaking wives but, on the other hand, diaspora also contains many Irish speakers who wish to re-possess the language of their forbearers. Therefore, there are departments of Irish studies at many universities abroad and Irish language education is supported in all-Ireland context [16].

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## On Competency Building Approach in Education Activities of Vocational-Technical Schools Students

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### Abstract

The article reviews general characteristics of competency building approach in education; it reviews several stages of its development. Key competencies which young Europeans should have are showed. General characteristics of education program, oriented at competency building model of education, are outlined. Four competency models are stated, each of which leads to different approaches to planning, organization and provision of high vocational education, particularly to evaluation and recognition of student's achievements and evaluation of his/her job placement possibilities at the job market.

**Keywords:** competence, competency, competency building approach, education contents, competitive advantages of the higher education institution.

### Introduction

Redirection of evaluation of education results is occurring in the modern context from ideas of "qualification", "accomplishment" towards the ideas of "competence", "competency" of the students, which leads to a shift towards competency building approach in education. General notion of such an approach lies within an idea of preparing new generation of work force, which is able to adapt to dynamic production, easily shift from one kind of labor to another, which have capabilities required for a broad spectrum of professions [1]. Competency building approach is proposed as a way of renovation of education contents. Ideology of education contents interpretation formed from "the result" is laid within its basis.

Key principle of the competency building approach towards education is orientation towards results, significant for the world of work. As information volumes grow, allocation of material which is subject to be learned becomes more and more difficult; therefore, most researches think that the "knowledge part" of the education loses its fundamentality in a sense that it is no more a basis for orientation of a person in a broad spectrum of life and professional problems, it does not create a basis for activity under the conditions of speeding up of pace of life, its unpredictability growth, freedom growth, difficulty of choice and responsibility for each of them [2]. Professional education nowadays must provide quick and effective professional self-development, professional development, professional retraining, and professionalization. Competency oriented professional education is aimed at mastering an activity, which provides preparedness to solve problems and tasks on the basis of knowledge, professional and life experience, values, other internal and external resources.

Modern job market sets up requirements towards workers' competency more often than towards specific knowledge. This is a more distinctive feature of those professional activity areas, current business practice of which requires constant changes tracking in external and internal environment. In the context of dynamic, inconstant, unstable external environment, formation of competitive advantages which allow a higher education institution to function in long run requires strategic management by means of implementation of well-timed changes inside the organization in accordance to the requirements of the surroundings as well as in external environment. It is the conditions of the external environment that are the basis for higher education institution management in the context of market-driven economy. They determine strategic goals and tendencies of development of the higher education institution which is able to provide high level of competitive performance.

In this regard N. Sosnin denotes that the changes of external environment (based on the requirements of the modern society, economy, personality etc.) lead to expression of results of



education in terms of competencies, encouraging formation of new direction of education process, which corresponds to the new conditions and prospects for the development of competitive and dynamic economy [3]. Internal changes lay within the determination of results of education in the form of target-oriented, basic function of the higher education system meaning a switch towards the education model with the emphasis shifting from contents (what is being taught) towards the result (which competencies would the student master, what would he know and be prepared to do). Such an approach towards organization of education process, aimed at students' achievement of a set result of education, makes teachers and students equal subjects of education process with their own goals and responsibilities, but connected by a sole education goal.

With competency building approach, first place takes student's ability to cope with numerous professional problems rather than his general information level. Hence not only a transfer of knowledge is maintained, but also capability of seeing the problem, form the task, find its solution is developed, even with lack of knowledge and practical experience. S. Merkulova emphasizes that "a student must realize problem definition, evaluate new experience, control the efficiency of his own actions individually, i.e. exercise his competency which is represented by a complex synthesis of cognitive, practical and personal experience. Competency is not synonymous to "completion of a course", it is rather connected with several additional prerequisites of specialist's development: his creative potential, emotional-volitional, motivational characteristics." [4]

Competency building approach is an adaptive education strategy but its basic principle is not the idea of preparation of a student for active correlation with the environment, but rather the idea of exclusion from the education contents of everything which is not directly related to his future profession. This idea is materialized by way of provision of education contents in form of a set of competencies, required for fulfillment of professional functions [5].

First question arising during the review of the competency building approach is related to interpretation of correlation of notions "competency" and "competence". First of all it is worthwhile to say that two variants of determining of correlation of these notions exist: they are either synonymous, or they can be differentiated.

From the first point of view, the competency category is a result of new economy and new approach to human resources, which arose from the need of adaptation of a person to conditions which change too often. A person, who has the competency, has knowledge, skills and expertise required for work in a specific profession but he is also capable of exercising self-dependence and flexibility during solving of the professional problems and he is able to maintain cooperation in the professional area. Competency is first and foremost oriented at development of individual principles of thinking, analytic self-consciousness, independence and responsibility for decision making; competency is set within the standards by means of determining of the criteria of activity, are of application and required knowledge.

European Training Foundation (ETF) glossary notes, that the term "competence" is used in the same senses as competency and it is used mainly in descriptive view. Within the scope of such an approach, competency is defined as area of relations, existing between knowledge and action within the human practice [6], and competency building approach suggests critical enhancement of practical orientation of education [7].

Amongst the representatives of the second point of view, one of the first people to suggest the meaning of competency was N.Khomsky, who noted that "there is a fundamental difference between competency (knowledge of his language of the speaker – listener) and usage (actual usage of language in specific situations). Only in ideal case the usage is the actual reflection of competency." [8] In this meaning, "usage" is the actual exercise of competency as hidden and potential for practical activity. At the same time, in R. Wiles work "Motivation reevaluation: competency concept" the category of competency is inclusively filled with actual personal aspects, including motivation [9].

The notion of competency has appeared in theory of human psychological development across theory of activity and behavioral sciences, it is used in situations when a person has a necessity of solving problems at minimal expenses of his own resources at one unit of useful result. The difficulty of implementation of this meaning lies within the fact that it describes human potential, which manifests itself depending on the situation and describes the tools of "the understanding and the action at the same time, which allows to perceive new cultural, social, economic and political realia." [10]

Therefore, in the 60-ies of 20<sup>th</sup> century, both the notions themselves and the difference between the notions “competency” and “competence” have been outlined, with the latter interpreted as based on knowledge, intellectually and individually predetermined social-professional human life and activities. The analysis of works on the competency and competence problem allows us to separate five stages of establishment of competency building approach.

The notion of competency appears in 19<sup>th</sup> century, when labor organization begins to be based, first and foremost, on learning of professional activities and acquisition of qualification acclaimed within a certain sphere and within the society. In 1911 W. Taylor develops principles of scientific labor organization which suggests basic programs of professional education for short-term qualification training for workers. Gradually the programs of professional education become complex and differentiate into different areas of activity. In 1930 a notion of “qualification” has been implemented for the first time in the USA for the purpose of systematization of the sector of employment. It is the appearance of the term “qualification” that leads to the development of a scientific notion – competency several decades later.

The second stage of development of competency building approach belongs to the period of 1960-1970 and is characterized by implementation of category “competency” into the scholarly apparatus by creation of prerequisites for differentiation of the notions “competency” and “competence”.

Third stage (1970-1990) is different in usage of categories competency / competence in theory and practice of language study and management. J. Raven’s work “Competency in modern society” gives an extensive explanation of competency as phenomenon consisting of large amount of components, most of which are relatively independent from each other, with some components belonging more to the cognitive area, while the others belong to the emotional but can substitute each other as contents of effective behavior.” That said, the types of competency make for different motivated human capabilities [11] and different types of activities have their own separate types of competency.

Fourth stage of development of competency building approach is characterized by an appearance and wide spreading of the scientific category of competency in domestic researches. In the middle of 1990-ies, works of A.K. Markova have been released, where within the general context of psychology of labor the professional competency becomes subject of a specialized comprehensive examination [12]. L.M. Mitina in her turn showed that except expertise, knowledge and skills (the EKS complex) the pedagogical competency also includes methods and techniques of realization of EKS in activities, communication, development and self-development of an individual [13]. Therefore, two components of pedagogical competency have been outlined: activity-based and communicative.

At the currently active stage of development of competency building approach, the meaning of competency and competence are defined as the main result of education. IN a report of international education committee for 21<sup>st</sup> century “Education: Hidden treasure” J. Delor has defined four global competencies, which form the basis for education: learn to perceive; learn to do; learn to live together; learn to live [14].

In 1990-ies a question of differentiation of the types of definition of key competencies for different stages of education arises. For evaluation of quantitative contents of competencies it should be noted, that according to the Job market terms glossary, the development of standards of education programs and education plans of ETF, four models (methods) of determining competencies have been outlined: based on characteristics of an individual; based on the fulfillment of the tasks for the activities; based on the fulfillment of production activities; based on activities results management [15].

The report of V. Hutmacher, prepared for a symposium on the program of Council of Europe, notes that different approaches to determining of main and key competencies exist. There might be only two of them – an ability to write and think or seven – learning, research, thinking, communication, cooperation, interoperation, an ability to do real work, to finish work, to adapt to oneself, to accept oneself. V. Hutmacher provides the definition of five key competencies approved by the Council of Europe, which all young Europeans should have:

- political and social competencies;
- competencies, connected with life in a multicultural society;
- competencies, related to possession of verbal and written communication;
- competencies, connected with an increase of society informatization;
- ability to learn throughout the life a part of the basis of lifelong learning.

Key competencies in this understanding give general definition of adequate exercise of social life of a person in modern society. They are all social, reflecting peculiarities of interaction, communication and IT usage.

B. Oscarson puts forward a list of basic skills, which might be interpreted as competencies – “personal, interpersonal characteristics, capabilities, skills and knowledge, which are expressed in different forms and varied situations of work in a team, planning, problem solving, creativity, leadership, entrepreneurial behavior, organizational vision and communication skills and they can be grouped in the following manner:

- general skills, for example, literacy, calculation;
- true-life skills, for example, self-management, relations with other people;
- key skills, for example, communication, problem solving;
- social and civilian skills, for example, social activity, values;
- skills required for employment, for example, information processing;
- entrepreneurial skills, for example, business capabilities researching;
- management skills, for example, consulting, analytical thinking;
- broad skills, for example, analysis, planning and control.

At the basis of comparison of the classifications existing nowadays, the developers of “The strategy of modernization of contents of basic education” have proposed general basics of differentiation of competencies according to the areas of human activity:

- competency in an area of individual cognitive activity, based on learning of methods of acquisition of knowledge from different sources of information;
- competency in an area of civil-social activity (realization of citizen, voter, consumer roles);
- competency in an area of social-labor activity (ability to analyze job market situation, evaluate own professional capabilities, feel confident with the standards and ethics of interrelation, self-organization skills);
- competency in household area (including aspects of own health, family life and others).

Within the “Concept of modernization of education for the period of 2010” the changes of the contents of basic education are presented as “a new system of universal knowledge, capabilities, skills, as well as experience of individual activity and individual responsibility of the students, i.e. modern key competencies.” The works of Russian didactics scientist A. Khutorskoi, who developed an algorithm and technique of construction of key competencies applicable to different educational levels, are dedicated to fundamental conceptual elaboration of the problem of key competencies as a component of person-oriented paradigm of education.

In the course of TUNING program work, with more than 100 universities from 16 countries, which signed the Bologna Declaration, participating in it, several groups of competencies have been separated:

1. Instrumental competencies, which include cognitive capabilities, capability to understand and use ideas and observations; methodological capabilities, ability to understand and control the environment, organize time, develop strategies of education, decision making and problem resolution; technological capabilities, capabilities connected with the usage of technology, computer skills and skills of information management; linguistic capabilities, communicative competencies.

2. Interpersonal competencies, i.e. individual capabilities, connected with ability to express feelings and relations, critical re-evaluation and auto-criticism ability, as well as social skills connected with processes of social interaction and collaboration, ability to work in groups, take social and ethical obligations.

3. System competencies, i.e. a combination of understanding, attitude and knowledge, which allows to perceive in what way the parts of a whole correlate with each other and evaluate place of each of the components in a system, ability to plan changes for the purpose of improving the system and constructing new systems.

I.A. Zimniaya comes to conclusion on a need of further resolution of a fairly complicated task of differentiation of key competencies and volumes of components, included into them, in connection with which she suggests differentiation of competencies into three main groups:

- competencies, belonging to the person himself as an individual, subject of activity, communication;
- competencies, belonging to social interaction of a person and social sphere;
- competencies, belonging to the activity of a person in all of its types and forms.

Civic competencies are distinguished in the first group: knowledge and adherence to the rights and obligations of a citizen; freedom and responsibility; self-confidence, self-dignity; civil duties; knowledge and pride in one's country symbols (coat of arms, flag and anthem).

Competencies of social cooperation are distinguished in the second group: with the society, community, group, family, friends, partners: conflicts and their resolution, cooperation; tolerance, respect and acceptance of alternative (race, nationality, religion, status, role, sex); social mobility.

Competencies of cognitive activity (tasks, problem situations, out-of-the-box solutions), activity competencies (game, work, planning, designing, modeling), information technologies competencies are distinguished in the third group.

The specifics of competency building approach are that the conditions of birth of knowledge are traced, rather than the ready knowledge is learned. With such an approach the education activity, which acquires researching or practical-transformation characteristics, on its own becomes a subject of learning.

Compared to professional competency, having standard sphere of application, formed samples of activity results and requirements towards their quality, key competence is exercised as a certain level of functional literacy. These two types of competency are united by experience, which is not limited to a set of knowledge and skills, integrity and specificity of situation perception, readiness to receive a new product.

The competency building approach towards education, which is formed on this basis, is reviews also in the context of Bologna process. As stressed by N.A. Seleznyova, "the usage of such an approach could encourage overcoming traditional cognitive orientations of higher education, lead to a new vision of the contents of education itself, its methods and techniques".

Four models of competencies are widespread in European higher education institutions practice currently, each of which leads to different approaches in planning, organization and provision of higher professional education and, particularly, to evaluation and recognition of student's achievements and evaluation of his employment capabilities at the job market.

Competency model, based on the personality parameters (CM<sub>1</sub>), lays at the basis of the approaches, which attach particular importance to the development of moral, spiritual and personal qualities of a person. The used education programs/education plans and models of evaluation are aimed at selection and encouragement of those, who possess academic abilities. This model in many ways influences traditional higher education and traditional methods of managerial personnel training.

The competency model of task resolution (CM<sub>2</sub>) pays particular attention towards acquisition of standard (algorithm-based) procedures and operations by a person (by means of studying of the labor process, method of working and others). Tasks and processes analysis lays at the basis of the education program, as well as difficulties evaluation which a person may encounter during the learning process of tasks, which are required to be resolved at a work place.



The competency model for production activity (CM<sub>3</sub>) underlines the importance of achieving results and is highly spread approach to competency in jobs and professions where the activity is measured in results, for example, sales, project management and production. The education program based on evaluation of motivation and strategies, which are used for achievement of goals.

According to the model of activity management (CM<sub>4</sub>), the activity is a function of social context of a person, who has a certain order of requirements and expectations relative to a person at a work place which may be mutually coordinated. The education programs are based on the analysis and coordination of important expectations which people should meet during the fulfillment of their employment duties.

General characteristics of the education program aimed at competency building model of education rather than the subject-knowledge model are as follows:

- description of characteristics and expected level of competency in a certain area;
- determining of required and sufficient set of training tasks-situations;
- process technique;
- algorithms and heuristic schemes, which organize activity of the students on overcoming of the difficult situations;
- techniques of accompaniment, consultation and support of the students at the process of training by the program.

That said, the key competencies, being a reason of unavailability of economic rents to the competitors, define the competitive advantages not only of a graduate, but also of the highest education institution. Materialization of the idea of “key competencies of a higher education institution on the basis of key competencies of a graduate” is tangible embodiment of understanding of competition in the education sphere as “competition”.

Under the conditions where the circle of potential customers of vocational-technical schools' services is limited by the boundaries of a territory and when several one-field vocational-technical schools function within its area, a single possible way of competition amongst them is suggestion of a service, which takes into account all of the individual requirements of applicants to the fullest: this task lies not so much in offering of a certain training program on some kind of a profession, as in making this program as close as possible to its user, i.e. put the education service on a level of individual requirements, having the highest level of personification. That is why the competitive advantages are maintained only in case the vocational-technical school positions itself at a fairly certain segment, characteristics of which are set by individual preferences of the education services consumers. In this case the figures of how much did the vocational-technical school offer its services oriented at a steady differential characteristic of demand on the education market come first and foremost amongst the figures of competitive advantages of a vocational-technical school instead of the quantity of students, studying there. This said, if a vocational-technical school is able to form its education service in such a way that it would take into account individual characteristics of a student, then the goal of determining of the key competencies of a vocational-technical school on the basis of key competency of its graduate would be reached.

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## Factors Affecting Online Shopping Behavior of Consumers

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### Abstract

The aim of this research is to find out what factors affect consumers in the context of electronic commerce, also to see the relationship between e-satisfaction and e-loyalty. As Internet has become a channel where online transactions have been done, and this created need for companies to understand how consumers perceive online buying. First thing done in this study was integrating relevant literature, and then testing which variables are affecting consumers' decisions to buy online. Seven hypotheses were formulated regarding to consumers previous experiences with e-commerce.

Data gathering was carried out by the survey which was sent online to 200 randomly selected citizens, from which 104 responded. Through the survey, the results of this study pointed out the relation between satisfaction with online service and consumers' intention to buy in the future which generates customer loyalty. So, the main point of the study was achieved successfully.

**Keywords:** e-commerce, e-satisfaction, e-loyalty, purchase decision process

### Introduction

The paper has been divided into 5 sections, named as; *Introduction* which will provide all information regarding the background of the study, purpose, research objectives and hypotheses. *Literature review* which provides information of what other think and write about the online shopping behavior of consumers. *Methodology* section in which is explained the method used for collecting the data. *Results and discussion* section will represent and interpret the data that was achieved from survey, and the last section is *Conclusion*.

#### 1. Background

Heng and SH (2003) said that e-commerce (online shopping) dates for over 40 years, and it is constantly growing with new innovations and technologies, and many businesses are entering to online markets. Online shopping can be determined as activity that deals with selling of goods and services through Internet, and for businesses is important to be aware of how consumers perceive online purchases. Nowadays, researchers are predicting that in a soon period e-commerce could easily take place instead of traditional business.

Tang et al. (2005) state that there are lots of people online around the world, and each of them represent possible customer of stores which offer online sale. While there are a lot of them, it is essential to know what they really need and want from the product. The primary step is classifying and examining some influencing factors for online purchases, so examining those factors that influence consumers' behavior via the internet is vital.

Lately, there are number of researches who want to identify role of satisfaction in e-commerce, and there is still need to understand the relation between e-satisfaction and consumer e-loyalty. Consumer satisfaction is essential to gain better financial performance of services in company, which is the second most important thing for them, after gaining a profit.

Purpose of this study is to identify and set out main factors which are affecting, and which are important to consumers when deciding to shop online. Also one of the goals is to determine the relation between e-satisfaction and e-loyalty of consumers.

### **Literature Review**

#### **Online shopping/E-commerce**

There are lots of definitions of e-commerce, and they all are not very far from each other. *“Electronic commerce is the sharing of business information, maintaining business relationships, and conducting business transactions by means of telecommunications networks.”* (Mostaghel, 2006)

Same as that, according to Tian and Stewart (2007) electronic commerce represents not only the business of goods and services, but also keeping buyers, creating relationships with customers and other companies and making businesses with them.

E-commerce dates for over 40 years, and has two main types: business-to-business (B2B) and business-to-consumer (B2C).

Identified by Gröblichhoff (2002) business to business e-commerce is electronic system through which companies are doing transactions and sharing information before and the service after transactions, with their customers and it is offering many number of applications for creating and achieving easier connections with distributors, resellers, suppliers and etc.

Khiabani (2006) defines business to business as something that includes flow of goods from seller to manufacturers and retailers. B2B communication symbolizes the larger segment of entire business activity.

Business to consumer e-commerce, according to Khiabani (2006) relate to any business which is offering goods and services to public, in this case consumers, over the Internet for their personal usage. Based on his study simplified definition of B2C e-commerce is that it represents the transmission goods or services from the seller to the end consumer.

Khiabani (2006) states that Sinha (2010) in his study identified that in this type of e-commerce, consumers may use Internet for different purposes like penetrating the product characteristics, over viewing the price charges, choosing the product or service, selecting the way of paying, deciding upon delivery options and at the end sale of product or service is done.

#### **E-satisfaction**

Lin (2003) states that for companies which deal with online services, in order to be confirmed and accepted by the customers, they need to provide the greatest delivered value so customers may see it as advantage and stay loyal to them. Companies can measure this value by looking at customer satisfaction, and factors that affect this satisfaction are: customer need, value and cost.

Mostaghel (2006) argues that Heskett et al. (1994) highlights consumer satisfaction as essential to gain better financial performance of services in company, which is the second most important thing for them, after gaining a profit. Companies saw the fast development of technology as a chance to achieve customer satisfaction and loyalty much easier and with lower costs. Many research studies showed that e-commerce has, significantly, changed the way in which business operates.

#### **Trust and online risk**

Trust, as stated by Gommans et al. (2001) is another important thing is consumers online buying behavior, and in their e-loyalty. Trust is connected with security. Consumer cannot see product in person while he is ordering it, and cannot look into salesperson's eyes while doing that, so it is important for companies to build trust among their consumers in order to avoid uncertainties. Loyalty and brand trust in general can assist in overcoming and beating some Internet disadvantages.

He also identified that consumer's fear of online fraud (credit card fraud, non-delivery of product) are the one of the major causes why they are not using e-commerce, frequently.

Anderson and Srinivasan (2003) predict that perceived risk is related to consumers' fear of losing of some transactions which are done online. However they also relate risk as the chance of losing something while purchasing or consuming the product or service. Perceived value is

positively related to consumers' intentions to buy over Internet, and it contributes to e-loyalty by minimizing consumers need or wants to go after some alternative providers. The risks that are associated with online shopping include financial risk, product risk, and non-delivery risk.

#### E-loyalty

Litfi and Gharbi (2012) argue that loyalty represents strong relation between brand and customer. That strong relation is manifested through emotional link that join consumers continuity of purchasing and consumption.

Gommans et al. (2001) said that e-loyalty can be expressed as "store loyalty" which means that consumers are continually visiting stores and buying items from same brand. He also defines customer loyalty as a point at which consumer demonstrate and repeat buying behavior which have positive nature related to product supplier, and they are repeating this action constantly.

*"E loyalty is all about quality customer support, on-time delivery, compelling product presentations, convenient and reasonably priced shipping and handling, and clear and trustworthy privacy policies."*(Gommans et al., 2001)

Reichheld and Scheffer (2000) demonstrated three advantages of e-loyalty. First of them which is most important and very expensive is to get loyal customer and to keep them loyal in the future. Second, loyal customers consume more than switchers which signs that they will spend more money in the future than the others. The last and but important one is loyal customers commonly propose and suggest non-loyal consumers to buy in a particular store or brand, so this is situation when loyal customers are using word of mouth communication.

Anderson and Srinivasan (2003) argue that customer service is an additional important thing for companies doing e-businesses. To avoid some difficulties in designing websites, they need to have attentive customer service system.

#### Online service

As stated by Cheung and Lee (2005) in their study, instrument that is used for measuring consumers' expectations and awareness of services is called SERVQUAL, which contain five dimensions: tangibles, reliability, responsiveness, assurance and empathy. Tangibles and reliability relates with information and services quality offered to customer. Responsiveness relates to responses from stores, when costumers have problems or questions regarding to product. Assurance relates to enabling trust and confidence to customers, and shows that every operation within company is done by people who are specialists in that field, and empathy relates to making care, and giving particular individual attention to customers.

According to Zheng (2006) Online shopping allows consumers to access to the new information of products, to compare product prices with other offerings, and to order products easily. All those stuffs are offering convenience to consumers. This type of shopping may reduce costs of products and services and distribution costs in order to get more consumers and to make them loyal.

As said by Chung and Shin (2008) for what differentiate the Internet from traditional stores is that prices are expected to be much lower on the Internet.

#### Research objectives and hypotheses

Objectives of this research paper are: to find the history of e-commerce, to examine main factors affecting the online consumer when considering and making a purchase over the Internet, to determine the relation between e-satisfaction and e-loyalty of consumers in online shopping, to examine how trust and satisfaction contribute to loyalty.

#### Hypotheses:

- H<sub>1</sub>: Consumers are generally satisfied with online purchasing;
- H<sub>2</sub>: Prices of products positively affects the consumers' online purchasing behavior;
- H<sub>3</sub>: There is a relation between perceived risk and consumers' online purchasing behavior;
- H<sub>4</sub>: There is a positive influence of trust on consumers' online purchasing behavior;
- H<sub>5</sub>: Consumers' future buying behavior is affected by web design, delivery time, and last experience;

H<sub>6</sub>: There is a relation between consumers' satisfaction and their intentions to buy in the future

H<sub>7</sub>: Satisfaction of consumers is affected by convenience and quality offered

### Method

In this study, the target population includes Bosnian online shoppers who have or have not purchased consumer electronics products on the Internet, and goal is to assess their opinions about e-commerce. The primary data was collected through survey. To efficiently reach target group survey was distributed online to 200 randomly selected citizens, number of respondents was 104. Survey consisted of 24 questions, which were developed from reading relevant literature, and was designed by using Google Drive.

It contain several background information about respondents; e-service quality, e-satisfaction, it investigate consumers buying behavior, e-loyalty in terms of re-purchase intentions, demographic information; gender, education, age group, monthly income level. Respondents were asked to read questions carefully and to be honest. Results of survey that were collected were also interpreted in PASW Statistics 18<sup>th</sup> edition. Secondary data was collected from journals.

### Results and Discussion

This section will represent collected data. Analyses have been done by using descriptive statistics and regression. Results are based on responses from 104 respondents.

Following page will represent gender, age, education and total income structure of respondents;

**Table 4. 1: Gender of respondents**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Female	59	56.7	56.7	56.7
	Male	45	43.3	43.3	100.0
	Total	104	100.0	100.0	

**Table 4. 2: Age of respondents**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Under 20	18	17.3	17.3	17.3
	21-30	74	71.2	71.2	88.5
	31-40	9	8.7	8.7	97.1
	Over 41	3	2.9	2.9	100.0
	Total	104	100.0	100.0	



**Table 4. 3: Educational level of respondents**

		Education			
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	High School	9	8.7	8.7	8.7
	Undergraduate Student	59	56.7	56.7	65.4
	Graduate Student	8	7.7	7.7	73.1
	Master Degree	28	26.9	26.9	100.0
	Total	104	100.0	100.0	

As we can see from table 4.1 sample consists of 104 respondents, both males and females. There were 59 female respondents (56,7%) and 45 male respondents (43,3%) used in the sample.

Table 4.2 analyze the age of our respondents, so as we can see, 18 of respondents were aged under 20, 74 of them were from 21 to 30, 9 of them were from 31 to 40, and 3 of them were over 41 years old. The 71,2% of respondents were from 21 to 30 years old.

Table 4.3 represents respondent's educational level, so as we can see 9 respondents were high school, 59 undergraduate students, 8 graduate students, and 28 master degrees. So, majority of respondents (56,7%) were undergraduate students.

After this descriptive study, hypotheses will be examined;

### H1: Consumers are generally satisfied with online purchasing

**Table 4. 4: Satisfaction of consumers**

		AreYouSatisfied			
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	78	75.0	80.4	80.4
	No	19	18.3	19.6	100.0
	Total	97	93.3	100.0	
Missing	System	7	6.7		
Total		104	100.0		

To analyze this hypothesis, frequency was used. So, as we can see from table, 75,0% of respondents are satisfied with online purchasing, 18,3% are not satisfied and the rest of respondents didn't answer this question. And according to results we can accept Ho, and say „Consumers are generally satisfied with online purchasing.”

### H2: Prices of products does not positively affects the consumers' online purchasing behavior

**Table 4. 5: Prices of products affecting consumers**

		Chi-Square Tests		
		Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square		20.426 <sup>a</sup>	3	.000
Likelihood Ratio		22.966	3	.000
Linear-by-Linear Association		18.459	1	.000
N of Valid Cases		96		

To test this hypothesis we used chi square test. Our p-value is 0.000 which is smaller than 0.05, so we can reject this hypothesis, too. Because prices of products positively affect the consumers online purchasing behavior.

**H3: There is no relation between perceived risk and consumers' online purchasing behavior**

**Table 4. 6: Perceived risk and online behavior**

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.822 <sup>a</sup>	3	.032
Likelihood Ratio	10.182	3	.017
Linear-by-Linear Association	8.679	1	.003
N of Valid Cases	104		

Chi square test analysis is done to confirm the hypothesis. From table 4.6 we can conclude that p-value is 0.032, which is significant at 5%. According to that, Ho is rejected which means „there is a relation between perceived risk and consumers online purchasing behavior.”

**H4: There is positive influence of trust (safety) on consumers**

**Table 4. 7: Influence of trust on consumers**

**EcommerceSafeWay**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Disagree	7	6.7	7.2	7.2
	Slightly Disagree	24	23.1	24.7	32.0
	Slightly Agree	43	41.3	44.3	76.3
	Agree	23	22.1	23.7	100.0
	Total	97	93.3	100.0	
Missing	System	7	6.7		
Total		104	100.0		

In order to see if trust (safety) has influence on consumers while doing online shopping, frequency is used. From table 4.7 we can see that 63,4% of respondents agreed that trust has influence, and 29,8% disagreed. So, in this case, hypothesis is accepted because majority of respondents think it has influence. „There is positive influence of trust (safety) on consumers.”

**H5: Consumers' future buying behavior is not affected by web design, delivery time, and last experience**

**Table 4. 8 Future buying behavior, web design, delivery time and last experience**

**ANOVA**

		Sum of Squares	df	Mean Square	F	Sig.
WebDesign	Between Groups	.862	2	.431	.277	.759
	Within Groups	144.545	93	1.554		
	Total	145.406	95			
DeliveryTime	Between Groups	1.833	2	.917	.591	.556
	Within Groups	145.713	94	1.550		
	Total	147.546	96			
LastExperience	Between Groups	2.998	2	1.499	4.311	.016
	Within Groups	32.336	93	.348		
	Total	35.333	95			

For testing those variables, factor and dependent variables are identified, and Anova test is used. According to results p-value for web design is found to be 0.759 which is bigger than significance value (0.05), and p-value for delivery time is 0.556 which is, also bigger than significance, so we can say that consumers future buying is not affected by web design and delivery time. But p-value for last experience is 0.016 which is smaller than 0.05, which means consumers future buying is affected by last experience.

**H6: There is no relation between consumers' satisfaction and their intentions to buy in the future**

**Table 4. 9 Consumers satisfaction and intention to buy in the future  
Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	18.626 <sup>a</sup>	2	.000
Likelihood Ratio	15.965	2	.000
Linear-by-Linear Association	8.073	1	.004
N of Valid Cases	97		

For testing this hypothesis chi square is used. As we can see from table, obtained p-value is 0.000 which is significant at 5%, so we can reject Ho, and say "There is a relation between consumers satisfaction and their intentions to buy in future."

**H7: Satisfaction of consumers is not affected by convenience and quality offered**

**Table 4. 10 Satisfaction with products, convenience and quality offered  
Coefficients<sup>a</sup>**

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	95,0% Confidence Interval for B	
	B	Std. Error	Beta			Lower Bound	Upper Bound
(Constant)	2.143	.184		11.667	.000	1.779	2.508
OnlineShopConvenient	-.196	.060	-.311	-3.246	.002	-.315	-.076
OffersBetterQuality	-.130	.039	-.320	-3.336	.001	-.208	-.053

a. Dependent Variable: AreYouSatisfied

For this hypothesis, regression is done, in order to see if satisfaction is affected by convenience and quality of products. According to the table above, p-value for convenience is 0.002 and for quality is 0.001 which means they are both significant at 5%. Those results enable us to reject Ho, and to say that consumers' satisfaction with online products is affected by convenience of products, and quality offered.

**Conclusion**

In summary, the study's findings have attained its objectives. For factors that affect consumers while shopping online, and that affect satisfaction, they consider that convenience, and trust are the most important variables, the next which are important for them are prices and quality of products. Those variables are the most essential ones for consumers when they decide to shop online. According to collected answers, they are very suspicious. And the cause of this may be raised cheating and fraud on the Internet.

If the price on the Internet and in some local store is approximately identical, the consumers will give more attention and interest on selection of goods rather than to price.

Also, according to results, if there is a good consumers previous experience, if consumer is satisfied with products and services, and if there is risk at minimum level than he will buy more in the future, which means he will be loyal. Web design and delivery time are not important for consumers while doing online shopping purchases.

This research can help many consumers in order to understand all advantages that online shopping is offering, to see that there are other options for doing shopping instead of going to traditional stores, and may become an initiator for using e-commerce, as well.

So, upon all this we can conclude that there is a positive and significant relation between e-satisfaction and e-loyalty. And that the results of study might confidently improve the general knowledge and awareness about e-commerce and might become an orientation for some future studies.

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