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Dear readers,

We have the honour to present to you the first issue of Littera Scripta journal (Economy, Management, Marketing, Linguistics, Pedagogy, Education, and History). Since 2015, it has been the second issue brought out by the editorial board composed of the employees of the Faculty of Corporate Strategy of Institute of Technology and Business in České Budějovice.

As a matter of fact, we strive for including high-quality studies reflecting the latest development in economy, management, marketing, linguistics, education and history. The inclusion of the journal in ERIH Plus database is perceived as an appreciation of our sustained effort. It also presents a real challenge for our journal to be considered for a prestigious Scopus database. We believe that we will achieve this ambitious goal together with our contributors.

With respect to the technical changes, we would like to point out the newly-designed front page of the journal. It has got a new graphic design including the key areas of research suggested in the journal. Moreover, the publishing portal, on which the journal has been published, changed significantly so that readers will be provided with a neat user interface. In addition, the editorial work will be less complex. All the up-to-date information, step-by-step instructions for the authors, the editorial board line-up and all the back issues of the journal are available on websites [Publication Portal of ITB](#).

Hereby, we would particularly like to thank all the authors who, in vast numbers, had sent their contributions to the peer view and also the proof-readers, who help maintain the high quality of the published articles. Finally, we should like to thank you, the readers, who retain your loyalty to Littera Scripta journal.

On behalf of the editorial board, we wish you every success.

Mgr. Zdeněk Caha, MBA, Ph.D.
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27th June, 2016, České Budějovice

REVIEW PROCEEDINGS

In issue 1/2016 12 reviewed articles written by 18 authors from 11 institutions were included.

Articles

Number of articles received: 22

Number of articles rejected in 1st round of review proceedings: 4

Number of articles rejected in 2nd round of review proceedings: 0

Number of articles agreed to be published: 18

Review conclusions

Number of reviews delivered: 42

• from which was reviewed by reviewer with Doc. or Prof. degree: 11

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Number of Protestants in the Russian Administrative Apparatus under Peter the Great

Alexander Andreev

South Ural State University

Abstract

The aim of the article is to elicit the number and proportion of Protestants among civil servants in the Russian Central government under Peter the Great. The author determines a circle of officials who could potentially profess the Protestant faith (whose families came from Western and Central Europe countries) and verifies their confessional status. For this purpose the author used a genealogical method, which consists in finding and systematization of unique biographical data, as well as in ascertainment of family ties (including the data of Lutheran and Catholic metric books). The results revealed that Protestants were concentrated in the upper level of the State apparatus in the initial period of Russian Collegiums' development. The number of Protestants in the composition of civil servants in the Central apparatus in 1720 was in the range of 59–73 persons. Among responsible officials of 1–8 classes (106 persons) the Protestants were no less than 20, 8%. However, by the end of the reign of Peter I the proportion of Protestants in this category of servants has decreased to about 8–10%.

Keywords: Protestants, State apparatus in Russia, personal composition of officialdom, share of Protestants in Russian administration, Russia under Peter the Great.

Introduction

In the 18-th century many natives of Western Europe countries have brought a great contribution to forming the Russian statehood. However the role of Protestants and their religious ideas in this process has not received an objective estimation till now. Scientists do not even know how many Protestants were in the Russian state apparatus. In special publications there were the best studied processes of government's organization (Medushevsky 1993; Anisimov 1997), and we have a few works

considered the social and personal composition of civil officials in Russia in the 18-th century (Pisar'kova 2007; Serov 2007). Still the authors of these works do not raise the question about the religion of civil servants-foreigners. As a rule the historians who have studied the personal composition of Russian bureaucracy, in this structure have detailed only a category of "inozemtsy" (foreigners) and have interpreted these foreigners generally, without confessional differences. Usually for studying the administration of Peter the First many scientists use the information about foreign officials in the Russian Central state apparatus in 1720, which was introduced in the 19-th century by Russian lawyer and historian Dmitry Polenov. However, historians were interested in social parameters of the group of foreign civil servants; they were studying the conditions of civil service and the duties of foreigners (Pisar'kova 2007, pp. 180–183, 552–554) and only occasionally their nationality (Petrukhince 2008, pp. 80–85). The religions of the officials found by Polenov have never been a subject of analysis, except A.E. Alakshin's monograph, who identified the most of these foreigners with the Protestants (Alakshin 2006, pp. 359–361). But this historian relied only on the data about places of their births and has not taken into account all available information. Actually no one has attempted to ascertain the faith of Europeans who clerked in Russian boards and central offices on the basis of documents. This article partially should fill the given gap (partially – because in some cases we have no comprehensive or even minimal biographic data about officials-foreigners in Russia under Peter the Great). Thus, the aim of the work is to elicit the proportion of Protestants in the composition of Central state apparatus in Russia at the age of Peter the Great for further study of the role of Protestants in Russian administrative modernization.

Materials and Methods

The share of Protestants among civil servants in various periods of Peter's reign can be determined on the basis of several sources. It is the decree of December, 15th, 1717 "About the appointment of presidents and vice-presidents in the Collegiums" (Polnoe sobranie zakonov Rossijskoj imperii, pp. 527–528), Polenov's list of foreigners who served in Russian boards in 1720 (Polenov 1869, pp. 1729–1766), and also the enumeration of officials made in 1724–1726 by the Russian scientist and statesman Ivan Kirillovich Kirillov, which was published in his book "The blossoming condition of the All-Russian state" (Kirillov 1977, pp. 36–45, 111–114, 167–168). The study addressed two objectives: at first, it was necessary on the basis of the named sources to determine a circle of persons who could potentially profess the Protestant faith (whose families came from Western and Central Europe countries); secondly, it was necessary to produce documentary verification of their confessional status. For this purpose the author used a genealogical method, which consists in finding and systematization of unique biographical data, as well as in ascertainment of family ties (including the data of Lutheran and Catholic metric books). In addition to church books, the article is based on

the data of entombments in the non-Orthodox cemeteries of Petersburg, on the personal sources and also on the conclusions of special genealogical and Church historical researches. Regarding the list of foreign civil servants of 1720, it is composed on the basis of Polenov's data that were published in his own paper (Polenov 1869, pp. 1729–1766) and also in Pisarkova's book as a special supplement (Pisar'kova 2007, pp. 552–554). From this list Moslems and those foreigners who have embraced the Orthodoxy were excluded (certainly, only in the case when it was possible to identify their religious belonging). For clarity the information about foreign officials is tabulated.

Results

According to the decree of 15 December 1717, many senior members of the first Russian Collegiums were foreigners. Among fifteen top administrators we find them: Baron Magnus Wilhelm von Nieroth (was appointed vice-president of Kammer-Collegium), Hermann von Brevern (vice-president of Justice-Collegium), Adam Weyde (who took the place of the second president of Military board), vice-president of Admiralty board Cornelius Cruys, vice-president of Commerce-Collegium Schmidt and president of Berg-Manufacture-Collegium Jacob Daniel Wilhelm Bruce (*Polnoe sobranie zakonov Rossijskoj imperii*, pp. 527–528). Almost all of them were Lutherans – this is proved by Church metric books of Petersburg and Moscow Lutheran parishes and by the other sources. The religion of Vice-president Schmidt is not clear only – he could be a Catholic or even an Orthodox German, however it is unlikely. Tsarist Minister J. Lefort has determined the character of Schmidt: “This is a man who knows a trade and money and served in this sphere in Bavaria” (Kozlova 1991, p. 141). It is unknown whether he came from Bavaria or only served there. All other administrators distinctly were born and educated in Lutheranism; therefore they tried to be helpful to the Church and their brothers in faith. Bruce and Weyde were the active parishioners and the patrons of the Lutheran church of Saint-Michael in Moscow (CSAM 1735, l. 1–2; CSAM 1766, l. 27 turn., 77 turn.). Soon they patronized the coreligionists already in Petersburg (Alakshin 2006, pp. 89–92, 104, 362). A Baltic Baron Magnus von Nieroth, like every landowner in this region, was a patron of the Lutheran parish churches. In his estate Albu in Esthland he established a Knightly academy for orphans from poor noble families and with the help of its director (pastor Wrede) he paid great attention to the children's moral development (Gavrilov 2011, p. 68). Hermann von Brevern came out of a wealthy merchant family that received Swedish nobility. He was born in the family of Riga superintendent and Lutheran theologian Johann Brevern. Before the annexation of Riga to Russia, he was vice-president of Riga Hofgericht and was defending the interests of local Protestant communities (Zapiski knjazja Petra Dolgorukova, p. 480; Zurabjan 2004, p. 30). His son Karl later became President of Russian Academy of Sciences and was an active Lutheran, a parishioner of Petrikirche in Petersburg (Büsching 1766, p. 88). A division of Adam Weyde, accommodated in Moscow, in 1719 was actually a Lutheran

community and this General cared about it as it was his own family. Further, after the relocation of the Weyde division to Petersburg, it will become the nucleus of the German Lutheran community of the Casting yard (Liteinyi dvor) (Alakshin 2006, p. 102). Finally, Cornelius Cruys played a very big role in the formation of Protestant communities in the city on Neva – Vice Admiral built in his Garth a first simultaneous church (both for the Lutherans and Calvinists), he took pastors from foreign countries; he assisted the Protestants with money and protected them in front of authorities (Alakshin 2006, p. 91–92, 141–148, 182–183). Thus, by the beginning of 1718, the Protestants (namely Lutherans) were not less than one third of the number of Boards’ heads (five of fifteen Presidents and Vice-presidents, named in the decree).

We have wider data about the foreign officials for the year of 1720. The data are tabulated (table 1). An indication of the faith with a question mark in the table means the most probable religion. All indicated with this sign are Lutherans who were immigrants from traditionally Protestant countries with a predominantly Lutheran population. On 30 July 1720 they swore allegiance to the service of the Czar with the help of Lutheran pastor Johann Leonhard Schattner who ministered in the community of Pushkarskaya Sloboda (in the future – St. Anne). Thus, their belonging to the Lutheran Church is very possible (Polenov 1869, pp. 1759–1764).

Table 1: Information about foreigners who served in Russian Collegiums in 1720, indicating their religion

№	Appointment	Name	Birth place	Religion
Kammer-Collegium				
1	Vice-president	Magnus Wilhelm von Nieroth	Esthland	Lutheran
2	Councilor	Heinrich von Fick	Hamburg	Lutheran
3	Assessor	Anton Johann von Salz	Esthland	Lutheran?
4	Assessor	Christian Berggard Glück	Marienburg	Lutheran
5	Secretary	Stephan Kochius	Prussia	Lutheran?
6	Kammerier	Johann Schmidt	Vyborg	Lutheran?
7	Translator	Jacob Kwist (Quist)	Narva	Lutheran?
8	Translator	Joachim Richert	Shania (Sweden)	Lutheran?
9	Actuary	Johann Georg Growe	Lievland	Lutheran?
10	Unter-Kammerier	Johann Matthias Pauli	Brandenburg	Lutheran?
11	Unter-Kammerier	Martin Schwanwitz	Torun	?
12	Clerk	Heinrich Grebner	Magdeburg	Lutheran?
13	Scribe (Schreiber)	Johann Schlaetterman	Stockholm	Lutheran?
14	Scribe (Schreiber)	Heinrich Ludwig Geber	Danish Holstein	Lutheran?
15	Scribe (Schreiber)	Jacob Johann Seelind	Riga	Lutheran?
16	Scribe (Schreiber)	Philip Trummer	Silesia	Lutheran?
17	Scribe (Schreiber)	Christian Wilhelm Cornelius	Prussia	Lutheran?

Revision-Collegium				
18	Vice-president	Johann Friedrich von Schmiden	Saxony	Lutheran
19	Assessor	Johann Berngardt Müller	Rostock (Mecklenburg)	Lutheran
20	Commissary	Christian Grüll	Riga	Lutheran?
21	Secretary	Johann Ostervaldt	Hamburg	Lutheran?
Justice-Collegium				
22	Vice-president	Hermann von Brevern	Riga	Lutheran
23	Councilor	Siegesmund Adam Wolf	Lievland	Lutheran
24	Councilor	Hans Heinrich Strig	Lievland	Lutheran?
25	Protonotarius	Ferdinand Heidenreich	Austria	?
26	Archivist	Alex Caspar Reimers	Reval	Lutheran?
27	Translator	Jacques Vernisober	France	Calvinist
28	Translator	Johann Wurm	Lievland	Lutheran?
29	Translator	Johann Wetzel	Sweden	Lutheran?
30	Copyist	Karl Wilhelm Steinmetz	Danzig	Lutheran?
State-office-Collegium				
31	State-commissar	Karl Prinzenstiern	Sweden	Lutheran
32	Secretary	Wilhelm Schulz	Prussia	Lutheran
33	Kammerier	Detlew Joachimsen	Ingermanland	Lutheran?
34	Translator	Abraham Jochems	Reval	Lutheran?
35	Unter-Kammerier	Georg Soltner	Berlin	Lutheran?
36	Actuary	Georg Spanaus	Dresden	Lutheran?
37	Accountant	Lucas Willers	Hamburg	Lutheran?
38	Kammer-scribe	Heinrich Sandten	Prussia	Lutheran?
Commerce-Collegium				
39	Councilor	Jean Paul Bacon	Bavaria	Catholic
40	Councilor	Franz Collins	London	?
41	Councilor	Jacob Guvitt	Edinburgh (Scotland)	?
42	Councilor	Jean Magnan	France	?
43	Councilor	Andreas de Cassis		?
44	Assessor	Johann Lefort	Geneva	Calvinist
45	Assessor	Dietrich Willers	Hamburg	Lutheran?
46	Assessor	Andrey Decals		?
47	Secretary	Johann Gottfried Günter	Prussia	Lutheran?
48	Commissary	Martin Speermann	Danzig	Lutheran?
49	Actuary	Peter Holstein	Narva	Lutheran?
50	Clerk	Gottfried Georg Kanzler	Dorpat (Lievland)	Lutheran?
51	Copyist	Georg Friedrich Tille	Hamburg	Lutheran
Admiralty-Collegium				
52	Vice-president	Cornelius Cruys	Stavanger (Norway)	Lutheran
53	Translator	Hamilton (Englishman)	Moscow	?
Berg-Manufacture-Collegium				

54	President	Jacob Daniel Wilhelm (James Daniel) Bruce	Moscow	Lutheran
55	Privy councilor	Anania Christian Pott von Luberas	Silesia	Lutheran
56	Assessor	Heinrich Schlatter	Zurich	Calvinist
57	Assessor	Vincent Reuser	Hamburg	Lutheran
58	Assessor	Jacob Lion Delehien	England	?
59	Assessor	G. Bargueret de Pressi		?
60	Secretary	Johann Friedrich Schmiden	Dresden	Lutheran?
61	Clerk	Johann Friedrich Lewin	Brandenburg	Lutheran?
Collegium of Foreign Affairs				
62	Privy councilor	Heinrich Johann Friedrich Ostermann	Bochum (Westphalia)	Lutheran
63	Historian	Johann Crussali	Venice	Catholic
64	Translator	Johann Keldermann		Lutheran
65	Translator	Franz Schoevius		Lutheran
66	Scribe (Schreiber)	Johann Schubert		Lutheran
67	Courier	Michael Ostergarden		Lutheran
Military-Collegium				
68	Privy councilor	Robert Wilhelm (Roman) Bruce		Lutheran
69	Privy councilor	Wolmar Anton von Schlippenbach	Lievland	Lutheran
70	Councilor	Johann Günter		Lutheran
71	General-auditor	Zentarov	Konigsberg (Prussia)	Lutheran?
72	Secretary	Franz Johann Wüst	Lignitz (Silesia)	Catholic
73	Ober-Kriegs-Fiskal	Gedden	Kaunas	?
Without specifying the place of service				
74		Gabriel Straub		?
75		Ernst Friedrich Crompein		Catholic?
76		N. Hoffmann		?
77		Wilhelm Blankennagel		?

The Polenov's material defines the faith of some persons. For example, in the State-commissar Prinzenstiern's patent it was announced that he can remain in his non-Orthodox "Christian faith". Such officials of Collegium of Foreign Affairs, as Keldermann, Schoevius, Schubert and Ostergarden, were named the Lutherans. Their colleague Crussali was a Catholic (Polenov 1869, pp. 1752, 1765). With regard to other persons, to determine their religion it was necessary to use a variety of materials. The translator of Justice-Collegium Vernisober belonged to the famous Moscow family of Calvinists who had fled from France after the repeal of the Nantes edict and became the parishioners of the Dutch church in Petersburg (Tastevin 1910, pp. 640–641). The assessor of Berg-Collegium Heinrich Schlatter was born in Zurich, in a famed center of Calvinism, and

lived some time in Berlin. His descendants professed the Lutheranism (a son Johann Wilhelm married a daughter of pastor Wassermann from Duderhof) (Balzer 1844, pp. 280–282). The study also found that many of the officials were Church leaders: Heinrich von Fick from Kammer-Collegium was a member of the Church Council of Lutheran Petrikirche (Büsching 1766, p. 229) and was visiting some sermons and worships of the Duke Karl-Friedrich of Holstein during his stay in Russia (Bergholtz 2000a, p. 452; Bergholtz 2000b, p. 89). The secretary of State-office Wilhelm Schulz, Fick's son-in-law, was going into Lutheran community of St.-Catherine in Petersburg (RSAAA 1888, l. 102–102 turn.). The assessor Christian Glück was the son of a famous pastor Ernst Glück and was the head of the Moscow school-gymnasium founded by his father (Bergholtz 2000a, p. 420). In the gymnasium he taught philosophy, ancient languages and Lutheran theology (RSAAA 1703, l. 8–11 turn.). Later he was in the Lutheran community of the Admiralty part in Petersburg (CSHAP 1727, l. 2). Many of these officials were members of Church Councils: Johann Müller, an assessor of Revision-Collegium, and assessor of Berg-Collegium Vincent Reuser – in Petersburg Annenkirche; Councilor of Justice-Collegium Wolf – in Petrikirche since 1728; Robert (Roman) Bruce, Jacob's elder brother, was one of the founders of the Lutheran church of St. Anne in Petersburg (as the commandant of the Petersburg fortress he decided in 1704 to move the Kirk of St. Anne from the fortress to Pushkarskaya Sloboda) (Büsching 1766, p. 229, 310–314; Alakshin 2006, p. 103–104, 109, 122; Grot 1797, p. 77, 96). The religion of some specialists is proved by the metric books: the councilor of Commerce-Collegium Bacon was a Catholic, as the secretary of Military-Collegium Franz Wüst (CSHAP 1710, l. 9–20). The copyist of Commerce-Collegium Georg Tille was a member of Church Council in the community of St. Peter in Petersburg (CSHAP 1734, l. 1). The privy councilor of Berg-Collegium von Luberas was a parishioner of Lutheran church of St. Michael in Moscow – September 9, 1722, he baptized in the church his daughter Sophie-Elisabeth (CSAM 1766, l. 148). The military councilor Johann Günter was a churchwarden of St. Anne community in Petersburg (RSAAA 1888, l. 1–1 turn.). He participated in baptismal rites as a godfather in Lutheran churches of Petersburg and Moscow (CSAM 1766, l. 158). Some relatives of the assessor Salz and secretary Ostervaldt were buried in evangelical cemeteries of Petersburg (Peterburgskiy nekropol' 1912a, p. 183; Peterburgskiy nekropol' 1912b, p. 330). Finally, the civil servant Ernst Friedrich Crompein is accepted as a likely Catholic – he is referred to as the godfather of a child in the Catholic community of Petersburg, which, however, does not exclude the possibility of having the Protestant faith (CSHAP 1710, l. 12 turn.).

The table shows, that in 1720 the Central State apparatus of Russia includes 77 foreigners who presumably confessed Western-Christian religions. Among them we find 22 Lutheran, 3 Calvinists and 3 Catholics, as evidenced by historical documents. Also, 34 civil servants are identified as probable parishioners of Lutheran Church. This probability is very high considering the data about their birthplace, about the patents, that were guaranteeing them freedom of faith in Russia and considering the fact of their

oath made with the help of Lutheran pastor Schattner (all these facts give to the authoritative historian Alakshin the basement to see in these people exactly Protestants) (Alakshin 2006, p. 359–361). One person is recognized as a potential Catholic. And finally, religion of 14 persons has remained unclear – among them there are Germans (one from Poland), some French, English, a Scot, a Swiss and an Austrian. Theoretically some of them could be Catholics, Protestants (Lutherans, Calvinists and Anglicans) and even Orthodox.

Discussion

Thus, the number of Protestants in the composition of civil servants in the Central State apparatus in 1720 was in the range of 59–73 persons. In total in 1720 in the apparatus of Collegiums and various boards of Petersburg and Moscow there were 1569 people (we mean only officials and clerks without the auxiliary personnel – i.e. without the guard, executioners, soldiers, craftsmen and others) (Pisar'kova 2007, pp. 188–189). Accordingly the share of Protestants averaged about 3,8–4,7%. However, if we analyse the structure of the higher administration level (officials of the Central apparatus of 1–5 classes), we'll see that among 32 officials in this category 9 were Lutherans, i.e. they amounted more than 28%. They were Nieroth, Schmiden, Brevern, Cruys, both of Bruce, von Luberas, Ostermann and Schlippenbach – all of them had ranks within 3–5 classes of the Table of ranks. In the segment of civil servants of 6–8 classes, as the table shows, 21 foreigners worked (not 14, as Pizar'kova indicated) (Pisar'kova 2007, pp. 188) – it is Fick, Salz, Glück, Prinzenstiern, Müller, Wolf, Strig, Bacon, Collins, Guvitt, Magnan, Lefort, Willers, Decals, Schlatter, Reuser, Delehien, de Pressi, Günter, Zentarov and Gedden. This list includes a State-commissar and Councilors of Collegiums (ranks of 6 class), a General-auditor (7 class), assessors and an Ober-Kriegs-Fiskal (8 class). Among them were the Lutherans, the Calvinists, a Catholic and some persons whose religion is not defined. We find exactly in this segment 13 Protestants, but certainly they were more. Taking into account that the number of Russian officials of 6–8 classes in 1720 was 53 (Pisar'kova 2007, p. 188), the share of foreigners accounted for 28,4%, and the share of Protestants – at least 17,6%. Overall, among responsible officials of 1–8 classes (106 persons) Protestants were no less than 20,8%. In the segment of officials 9–14 classes the percentage of foreigners amounted to 17,7% (it is hard to determine how many of them were Protestants), and among clerks it is generally 1% (Pisar'kova 2007, p. 188). All these data testify the wide participation of Protestants in the work of Russian State Collegiums in the initial period of their development. Results of the research refute the view of Soviet scientists that the foreigners were always a very small group among the officials of Russian State boards, and that they were occupying mostly lower clerical posts which did not allow them to influence administrative processes (Medushevsky 1983, p. 140). Our figures suggest the contrary, namely they indicate a big representation of Protestants (more foreigners) in the upper segment of the board apparatus and, conversely, their paucity among ordinary clerks in 1720. Appositely, N.

Kozlova in 1990s expressed a doubt about correctness of Medushevsky's conclusions about the small role of foreigners in Russian boards (Kozlova 1991, p. 142). However, already in 1722, the number of foreign officials in Russian Collegiums was greatly reduced, due to an attempt of Peter the Great to adapt the collegiate system to Russian conditions and to make it effective (Pisar'kova 2007, p. 190). A contemporary wrote that an inspection of foreign civil officials in Petersburg in early 1722 showed their reduction up to 20 people (Bassewitz 2000, p. 398). In the years 1724–1726 among responsible officials of the first eight classes we find a little more than 20 foreigners (Kirillov 1977, pp. 36–45, 111–114, 167–168). According to our calculation, the share of Protestants among civil servants of 1–8 classes in this period was approximately 8–10%.

Conclusion

On the basis of varied sources (such as legal, Church and personal documents) we may confirm that the Protestants (the Lutherans) prevailed among the foreign officials under Peter I. Due to the reform of the Central administration (because of Collegiums' establishment) the necessity of using the European experience increased. By the end of the reign of Peter the Great the Protestants (and the Europeans generally) took a strong position in the Russian Central government and really were able to influence the governance and political development of the country. In the period of Collegiums foundation in Russia they were indispensable.

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A Standardised Test as a Tool for the Reliable Verification of Acquired Knowledge

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Abstract

This article deals with the testing of the achieved language skills of students in a higher education institution. Various forms of testing are reviewed, including the phenomenon of electronic testing (e-testing). A common problem when testing is the validity and the reliability of the tests. It is for this reason that for the research a standardized tool - mock test - was used and converted into electronic form. The aim of the research was to verify, through the aforementioned tests, whether students of English at the Institute of Technology and Business in České Budějovice (ITB), after completing the first two semesters of general English (the course was preceded with English acquisition at primary and secondary schools), actually achieved a B1+ level according to the Common European Framework of Reference for Languages (CEFR) for the written part of the test.

Key words: testing, e-testing, validity, reliability, level, B1+, higher education institution, English

Introduction

Many higher education institutions claim that their students have achieved a certain level of English. However, this level is not usually measured through a standardised test and there is often no official record on a candidate's performance. The ITB in České Budějovice has set itself the goal of verifying, through a standardised written mock test, the attained level of English of freshmen attending the first two semesters of general English at the institute.

Testing is in principle a means by which to establish how something works. As far as a learning environment is concerned, testing provides information on the achieved level of knowledge or skills. There are five main types of language testing: placement tests; language aptitude tests; achievement tests; proficiency tests; and diagnostic tests.

The main objective of placement tests is to decide on an appropriate level / class / course for a student. This form of testing is usually used by language schools. Language aptitude tests indicate how well a learner can learn a language under given conditions within a given time framework. Achievement tests can be divided into short-term and long-term tests. These measure how much knowledge from a syllabus has been acquired within a semester / year. Proficiency tests provide information on the knowledge and ability of a student from the broadest possible perspective. This form of testing is independent of a specific textbook and period of time. IELTS, TOEFL or TOEIC are examples of this form of English examination. Diagnostic tests diagnose how much and what a learner knows. It provides both the learner and the teacher alike with information on the weaknesses of a student i.e. they provide valuable feedback on what areas require attention. The key criteria that a test must fulfil to provide thorough and accurate information on a student are reliability, validity, practicality and the backwash effect.

Tests can be taken in either printed form or computer-based. Both forms have their strengths and weaknesses and are suitable for certain subjects and certain learners.

The issue of the differences in learners' performance between computer-based and paper-based tests was investigated by H.K. Lee (2004). Lee states in his comparative study that the analytic components of computer - based tests were assessed considerably better.

Of late, computer-based testing for ESL (English as a Second Language) has been in the spotlight, not only in connection with comparisons to paper-based testing, but also in terms of its assessment, possible self-assessment, accessibility, and the creation of authentic tests. Hunt, Neil, Barnes (2007) state that a vast array of information and communication technology (ICT) is utilised for testing, but its use for assessment purposes is very limited.

Alderson and Huhta (2005) published a paper on computer-based diagnostic tests. They focused on the dialang online assessment system which is based on the Common European Framework of Reference for Languages (CEFR). It is a testing system which gives learners feedback on their language skills rather than on their proficiency.

Hansen and Mislevy (2005) support the idea of accessibility to computer-based testing for students with special needs within a validity framework. However, they go on to express concerns that the extended time frame for the test, larger font size and access to online dictionaries, could undermine the very validity of the tests. Both authors emphasize the need for a framework within which these extra features for learners with special needs would not invalidate the test results.

Douglas and Hegelheimer (2007) deal with the issue of computer-based test assessment. They reveal the threats that are inherent in electronic language testing, such as the wide range of technologies that enable students to cheat in tests, question formulation, feedback, etc. Ockey (2009) also focuses on the developments and challenges facing computer-based test assessments stating that computer-based testing has not met

expectations. He goes on to state that he believes that the growth in its use will expand its evaluation capacity.

Cummins and Davesne (2009) recommend using electronic portfolios for second language assessment. The portfolios offer qualitative and quantitative assessments which can be employed for teaching and learning purposes.

Kuramoto (2013) in his study on reading comprehension level prediction in EFL testing, recommends the use of not only computer-based multiple-choice questions but also written questions in order to assess a learners abilities.

Strother, Fazal, Johnson and Millsap (2008) consider the suitability of language proficiency computer-based testing from the point of view of non-native speakers. The survey they carried out proved that computer-based tests are equivalent to paper-based tests.

In their paper, Fryer, Bovee and Nakao (2014), focus on the motivational orientation of learners. Their findings suggest that not all students are in favour of taking computer-based tests due the low value assigned to the results.

Materials and Methods

The aim of the research was to verify, through a standardized test, whether students of foreign languages at the Institute of Technology and Business in České Budějovice (ITB) achieve a B1+ level for the written part of the test at the end of the second semester. Discussions on the B1+ level centre on the minimum percentage of compliance with the requirements for passing the test. The ITB, taking into account the great heterogeneity of the language skills of students attending higher education, has set this limit at 70 %, whereas for international tests this stands at 50 %. This minimum completion percentage was determined on the basis of many years of experience teaching English as a foreign language. It is considered to be relevant because it corresponds to the minimum requirements for students who wish to continue their studies during which they will be required to study professional language relevant to their specialization.

At the ITB in České Budějovice students can follow full-time and part-time bachelor study programmes (Economics, Mechanical Engineering, Civil Engineering, Transportation, Logistics) of which general language lessons form an integral part. The students of Economics have two 90-minute lessons a week, all the other study directions have one 90-minute lesson a week. The level of English of the freshmen varies from A2 to B2 according to the Common European Framework of Reference for Languages (CEFR). The differences are caused by many factors, such as motivation, foreign exchange stays, age, whether or not a school leaving examination for English was taken at secondary school, etc. The objective within the first year is to equalize this initial level of the learners to B1 level in order to prepare them for studying professionally-oriented language. The preparation is aimed at improving their receptive and productive skills in writing on the basis of the standardised City and Guilds mock test (Caha 2013, 2014, 2015).

Based on the B1 requirements students “(You) can understand the main points of clear standard communication; convey information, feelings & opinions on familiar topics; engage in discussion to reach shared understanding; produce simple connected text; describe experiences, events, hopes & ambitions.” (City & Guilds).

The research sample and the implementation period of research

The research took place during the examination period of the spring semester of the 2014/2015 academic year. The research sample consisted of 504 students enrolled in the AJP_2 course. Of the total research sample, 362 were full-time students (143 men; 219 women) and 142 were part-time students (55 men; 87 women). The full-time students were aged 18 - 25 years, the part-time students 25 - 55 years.

The written part of a standardized B1 level test for the City & Guilds International Examination was used as the diagnostic tool for measuring the level of students’ knowledge. The written part takes about 2 hours and 40 minutes and includes listening (approx. 30 minutes), reading and writing (approx. 2 hours and 10 minutes).

The listening part consists of four parts in which students either choose the best answer or fill in missing information.

The reading part also consists of four parts. The tasks focus on looking for missing paragraphs / sentences, appropriate headings and answering questions with a limited number of words.

The test was completed electronically. This was followed by electronic test evaluation with exception to the writing task, which was corrected manually by teachers based on the regulations and methodology of City & Guilds. The results were statistically analysed.

The research analysis should either confirm or refute the following research assumption:

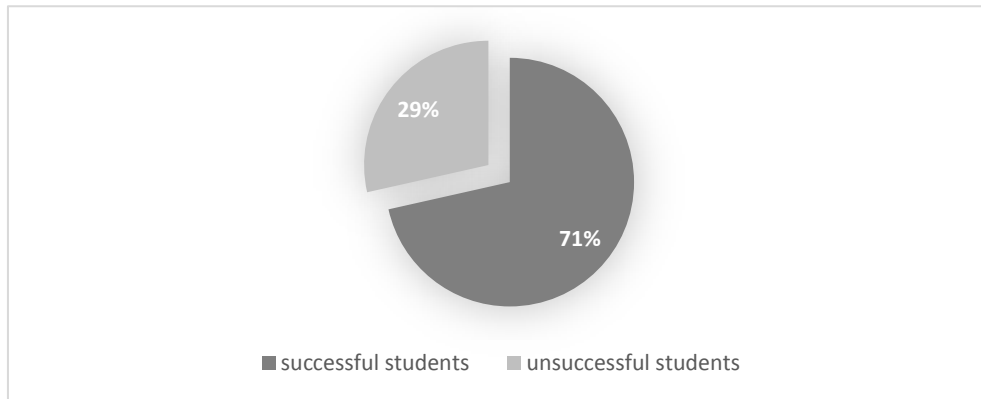
80 % of the students attending lessons of general English will achieve the B1+ level for the written part of the test (with the minimum limit for passing the test set at 70 %).

The percentage was elicited from the past students’ results which were verified by internal (non-standardized) test. And the research authors supposed that the internal test is at the same level as the standardized one.

Results

As can be seen in Figure 1, the research assumption was refuted because the percentage of students who achieved the B1+ level was only 71 %.

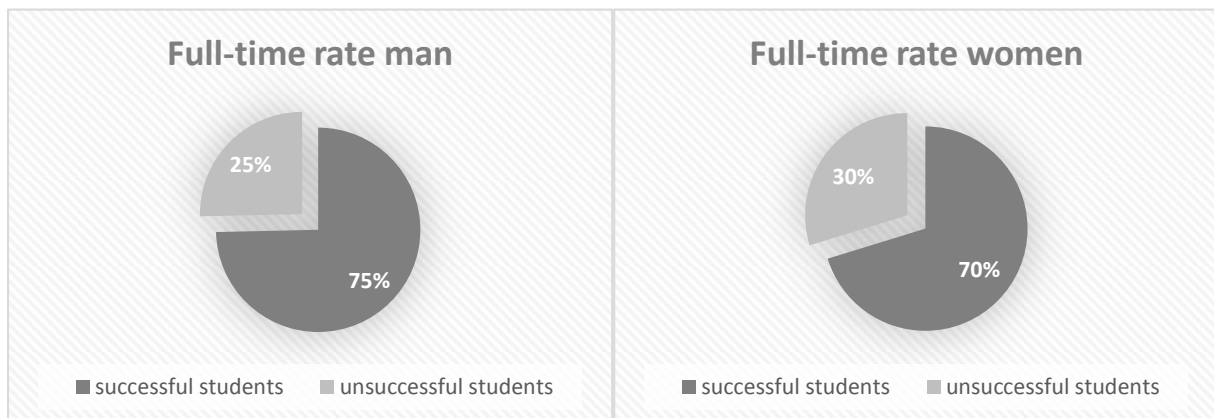
Figure 1: All tested students – overall results



Source: authors

Figure 2: shows the difference between full-time and part-time students. It is clear that, overall, part-time students were more successful when tested.

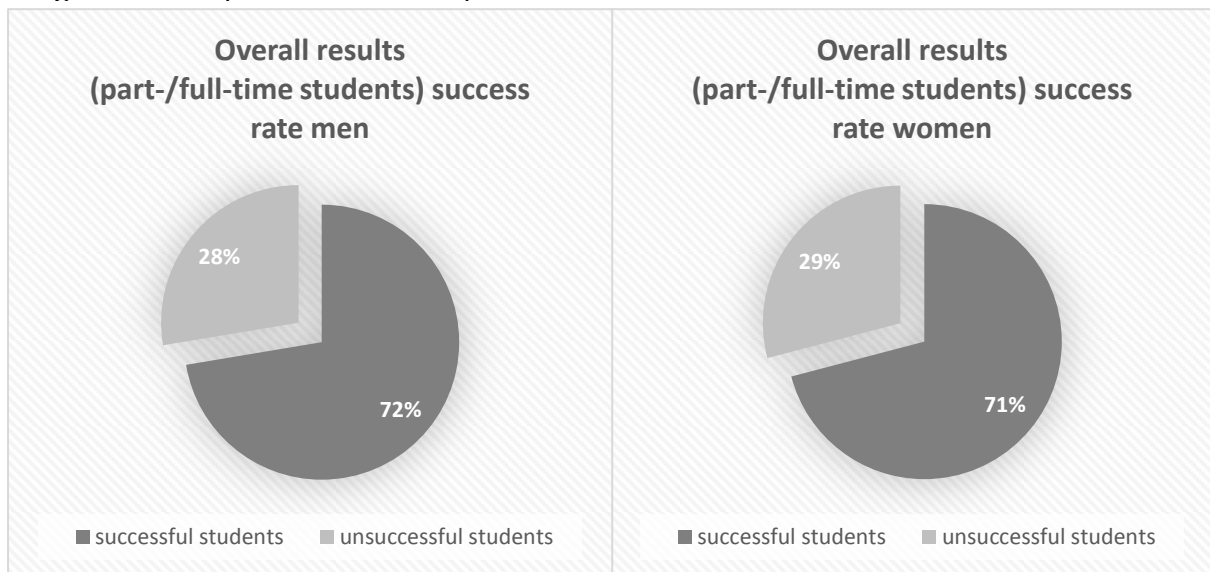
Figure 2: Full-time students – total rate of success



Source: authors

In Figure 3 a comparison is made of the results of full-/part-time students by gender. The graph shows almost no difference in the success rate.

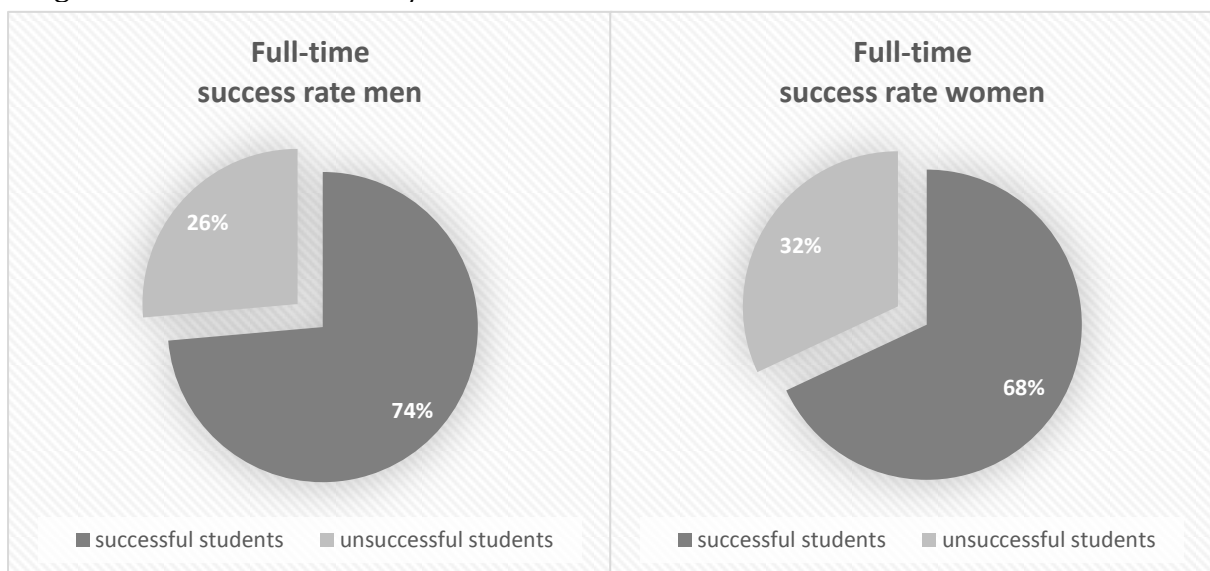
Figure 3: Part-/full-time female / male students – differences in success rate



Source: authors

In Figure 4 a comparison is made of the results of full-time students by gender. The graph shows that men were more successful.

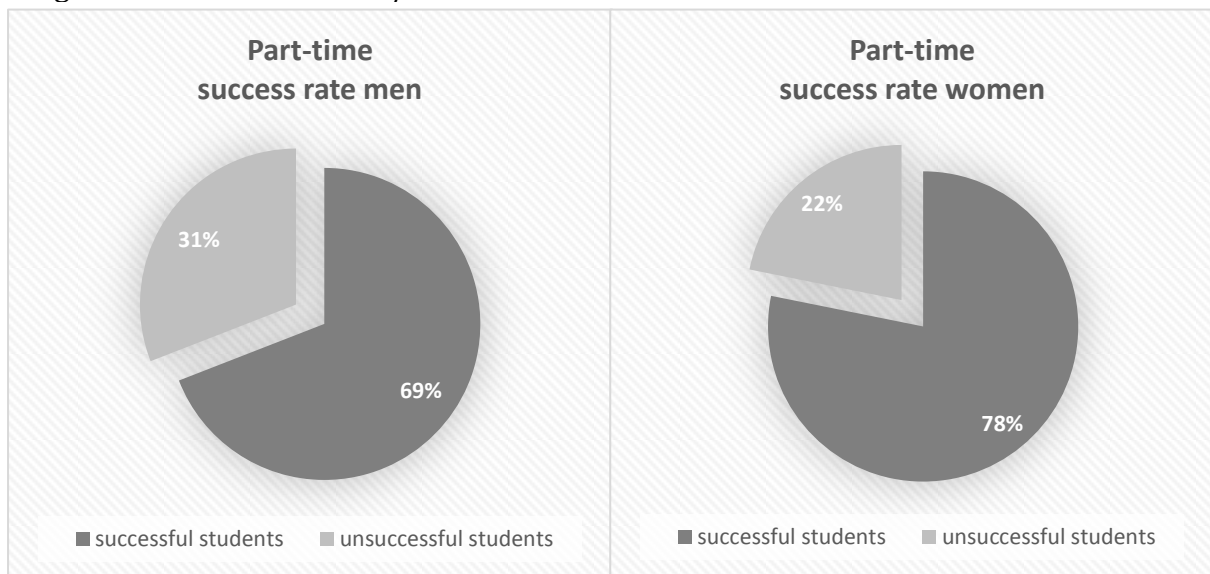
Figure 4: Full-time female / male students – success



Source: authors

Figure 5 compares the results of part-time students by gender. It is evident that female part-time students were almost 10 % more successful than their male counterparts, and that this group (at 78 %) was the closest to confirming the research hypothesis.

Figure 5: Part-time female / male students – success rate

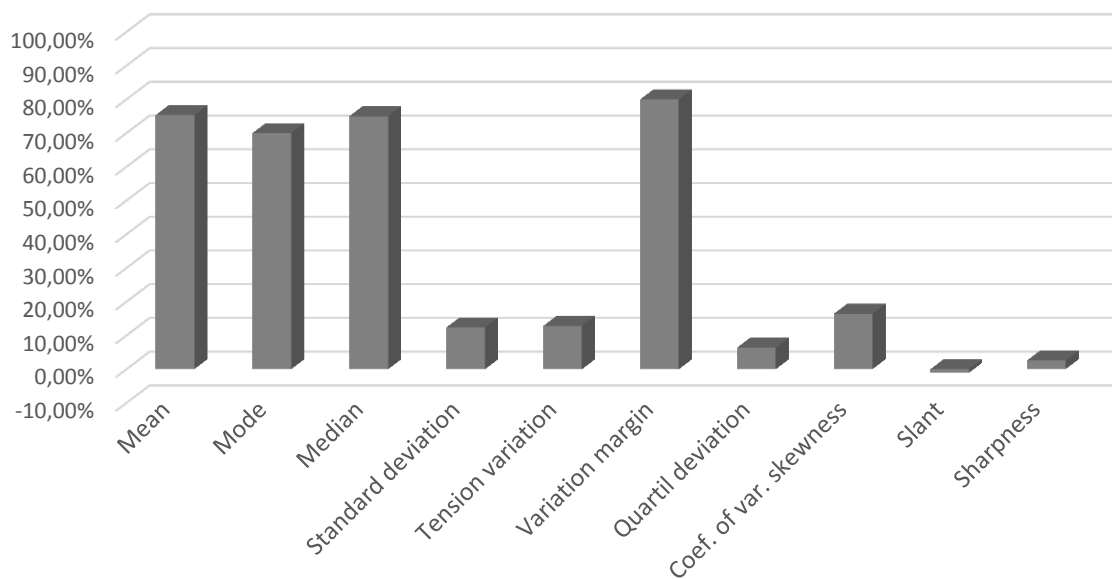


Source: authors

Figure 6 gives a more detailed analysis of the test results. The resulting values, mean, mode and median reveal that the average student is able to take and pass the examination.

The standard deviation and variation margins are not high. This proves that a relatively large number of students are just below or just above the threshold for passing the test.

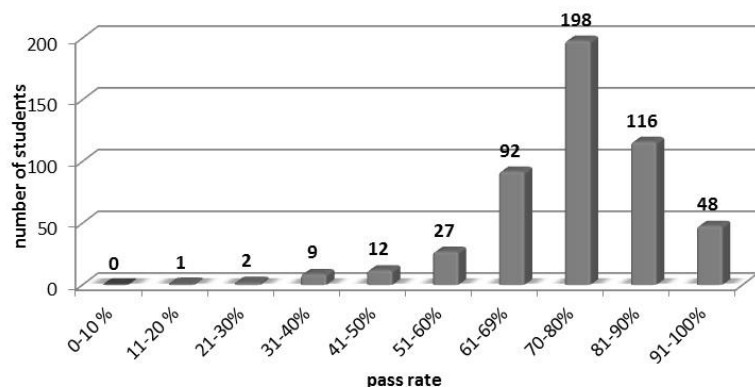
Figure 6: Detailed analysis of overall results – Part, full time students



Source: authors

Figure 7 illustrates the distribution of students. From this it is clear that the distribution largely corresponds with the Gaussian curve.

Figure 7: Assessment of full-time and part-time students



Source: authors

Discussion and conclusion

Although the results of the research refuted the research assumption, the standardized test proved to be a very convenient tool for checking the outcome of the language skills of students. The standardized test has shown the areas which are needed to be paid the attention to, use of English – collocations, reading and listening comprehension with the focus on the gathering detailed pieces of information.

The use of computer-based testing in combination with a standardised examination tool seemed to motivate students in comparison with the internal tests used before because the former tests lack the variety of tasks. The standardized electronic test reminded of the atmosphere when taking a real test and this fact caused that students' approach was more responsible, in particular the part-time students. Consequence of the testing was an obvious improvement of students' attitude to the language acquisition. This fact has been confirmed by all professional language teachers at ITB. The survey was innovative at the institution in that it pointed to the potential practical use of a mock test for the verification of a declared or achieved level of English, as a result of which a significant number of students were encouraged to take the real examination. As far as level testing is concerned - based on the updated information from other language departments where the language is not the major – it is not very common. However, it is highly recommendable. The other positive aspects of standardized computer-based test application are taking into account the number of students who participate, the related overhead costs, and environmental sustainability.

Further, the research has shown an interesting fact, i.e. the male students in full-time form of study are a bit more successful than the male students in part-time form of study. On the other hand, the findings by the female students show the opposite result. It could be caused by a wide range of aspects, which will be examined in the next study of authors.

Future examination preparation should be focused on the further development and training of language skills. The authors have found out weaknesses and strengths in the written test skills which enables to concentrate on them in detail in the future. It supposed to verify the results at the end of each academic year and based on the findings to take steps. Based on the differences between the study forms and gender the research will be carried out and it is expected to identify the causes. Consequently, the measures will be adopted according to the current situation.

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Effective E-learning applied to foreign language teaching

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Abstract

This paper presents the results of comparative research carried out at the Institute of Technology and Business in České Budejovice (ITB) into the foreign language knowledge of students according to different teaching methods. At the Institute, traditional teaching methods (with a real teacher) are applied, supported by the use of information and communication technologies. The research demonstrated that the results from both forms of teaching were comparable, thereby proving that ICT can contribute positively to the development of the professional language skills of students in higher education. The latest technologies have the capacity to influence both the learning environment and the learners themselves, including the way they collect and process information and form new knowledge. If applied appropriately, new technologies can substantially support this process.

Keywords: efficiency, effective teaching, e-learning, traditional teaching

Introduction

The question of what behaviour leads to effective teaching was already being discussed in the second half of the 20th century. The discussions, both at international and domestic levels, were connected with the search for so-called "good teachers". Examples of international authors active in this field include Flanders, who published his book entitled "Analyzing Teaching Behavior" in 1970. On the domestic side the issue started coming to the fore even before the revolution in 1989. Of particular interest are the works of V. Kulič ("Effective management of learning activities"), J. Skalková and F. Bačík ("Increasing the efficiency of the educational process in the classroom"), J. Manak ("The effectiveness of educational videos ") and Z. Macek ("Research into the effectiveness of training videos"). J. Průcha in his book entitled "Educational Evaluation" (1996) presents an empirical model of the effectiveness of education. The author calls it "empirical"

because, rather than being purely theoretical, it is based on actual empirically observed data on the determinants of efficiency.

Research into how effective the work of teachers is has primarily focussed on the procedural aspects of teaching and the outcomes of that process. Researchers such as Nezvalová, Muřík and Janik are currently actively engaged in looking into this issue. They highlight the development abroad of some major research paradigms dealing with efficiency. Investigations of this type are included in the "process - product", alternatively "context/presage - process - product" research models.

The basic principle behind these paradigms is the processual product characteristics of the teaching relationship (process - teaching and product - learning outcomes). "In common teaching practice, this means, we investigate what skills students have or do not have, their motivation and their previous knowledge, what teacher they have and what they do during the lesson - structure of the learning time, working with the content, the climate in the classroom and the interaction and communication among the teacher and students" (Hrušková 2008). One of the essential determinants of the quality and effectiveness of the educational process is the time factor. In the Pedagogical Dictionary (Průcha, Walter, Mareš) two distinctions are made with regards to education time: planned - as determined under educational standards and regulations; real - the actual educational process. The time factor differs between countries according to social, political and economic circumstances, between schools in the tertiary sector in the Czech Republic according to the specifics of individual study programs and curricula, and is very closely linked to the graduate profile and the conditions the student is supposed to fulfil during their study.

Today, computer literacy is considered to be a basic training requirement through which people can comfortably handle increasing amounts of information. E-learning and online education via the internet, as a method for teaching vocational subjects and languages at a distance, promotes autonomous learning, as well as mobilizes and supports students in their self-directed learning.

Computer supported learning is a complex form of education. The role of students in education has changed with the increasing openness to technical innovation. The use of ICT in tertiary education, by both teachers and students alike, is now commonplace and obligatory. Modern teaching techniques which incorporate computers, create a richer sensory space in which students can receive and process information. In the process of pedagogical interaction and communication, technology increasingly serves as a mediator between the teacher and the student, but it should never replace human contact and weaken social bonds.

In this paper the focus is on the real-time factor within the educational process in the tertiary sector. Průcha (2002) understands the educational process to be a form of social interaction which "takes place in an interacting space-time".

Research goals, methods and organisation

The goal of the research was to empirically compare the success of e-learning to traditional teaching methods on the development of language knowledge on the basis of specific variables. The primary reason for the research was to establish whether e-learning, as part of bachelor degree programs, extends knowledge. The potential impact and benefits of utilizing electronic language achievement tests, which focus on professional, economic and technical vocabulary, are large.

Materials and methods

In this section the method of data collection and processing, basic data file and research sample are described.

Basic data file and research sample

The research focused on the specialized language education of bachelor degree students attending the Institute of Technology and Business in České Budějovice (ITB). The basic data file consists of bachelor students of whom the majority are 21 years old. Their studies are either oriented towards the economics (Economics and Management) or technical (Construction) fields. The questionnaire survey was conducted under five hundred students. In total 483 questionnaires were returned (96,6 %). Caha (2015) presents the system of language education at ITB in detail.

The educational research began in the academic year 2011/2012 and was completed in 2013/2014. Language testing has formed a standard part of the language teaching methodology at ITB for several years. The testing is only carried out electronically. Caha (2014) deals with advantages and possible problems of electronic testing at ITB. Every form of test has a guarantor; the evaluation is processed automatically in the ITB Information System.

The survey was carried out on the basis of the concept of fringe and control groups. This approach is analyzed in specialist sources, for example by Pelikan (1998), Gavora (2000), Kerlinger (1972), Chráska (2007), and Hendrich (1988). The comparison of two education methods is based on the idea that one group of students is taught according to one method and another group of students by a different method.

The fringe group i.e. those students who studied specialized language through e-learning, consisted of 148 students (number F105/M43). The control group i.e. students who were taught foreign languages the "traditional" way (face-to-face), consisted of 335 students (F178/M157). Of these students, 277 were following the Economics and Management (EKO) program (186 traditional method; 91 e-learning) and 206 students the Construction (TECH) program (149 traditional method; 57 e-learning). The fringe group consisted of 43 men and 105 women aged 19-52 years (\bar{x} 24,7). The control group consisted of 157 men and 178 women aged 19-33 years (\bar{x} 21,7). Both groups

consisted of students in the 2nd and 3rd years of their studies at ITB. The experiment lasted for two years.

Fringe group education

The foreign language education for students in this group started at the same time as for the students in the control group i.e. in the second year according to currently recommended plans. During the research, the fringe group was evaluated, as were the study topics and assigned tasks, which were discussed during seminars on the basis of electronic materials made available through the ITB Information System and other websites recommended by the tutor or through individual choice. During seminars, students were encouraged to exchange website addresses, work together on exercises or tasks on key issues, to consult in small cooperative groups or individually with the tutor of the foreign language through chat rooms and e-mail communications, and to fulfil listening tasks involving specialized texts recorded by native speakers. Students were advised to focus mainly on the use of e-learning study materials and online materials in the ITB Information System. The fringe group were aware of the existence of websites focused on the teaching of economic and technical English and German. Students chose the learning materials themselves. The study topics were evaluated according to the syllabi tailored to the individual subjects.

The prerequisite for the successful completion of the course was achieving a pass for First English I and First English II (AJP_1, AJP_II), or First German I and First German II (NJP_1 and NJP_2). This is equivalent to CEFR B1 level for languages. The e-learning site of the ITB Information System focuses on all four language skills: listening and reading - through the provision of e-learning modules which consist of a transcript of a text for listening and key questions to assess understanding; writing - tutors give feedback on writing exercises (e.g. placing orders, complaints, etc.) through electronic communication, webinars, or vaults; speaking - skills are "trained" through live chat, videoconferencing or consultations and workshops in small groups.

Control group education

English and German language education begins in the second semester and lasts two years. The students in the control group learned the same topics as those in the fringe group. The majority of the time they were taught the traditional way with preference given to group and cooperative language education, project education and brainstorming. The aim of the specialized language education during the bachelor's degree program at ITB is to manage complex specialized knowledge and skills in a foreign language at CEFR B1 level, as defined in the syllabus on the ITB Information System. There is a clear definition of what the education involves and the evaluation thereof (basis, evaluation criteria, final rating). Students work with obligatory and recommended literature "face-to-face" at seminars.

Research design

The educational research took place in a natural environment. It can therefore be considered to be either “natural” or “experimental”. This form of experiment can link the natural conditions associated with specialized language education with the aim of the research.

Research methods

The research methods consisted of a combination of quantitative steps. The main reason for this choice was to establish the frequency of the effect occurrence, to gain numeric data and then calculate the statistical results.

- The success of e-learning was investigated through the experiment. The efficiency was compared between education on the basis of e-learning and that of traditional teaching methods.
- Students’ specialized language skills and knowledge were investigated through the use of electronic specialized language tests, oral presentations and projects. Summative evaluations were carried out at the end of the subject program and at the end of each school term (in 3rd, 4th and 5th semesters). The aim was to evaluate students’ insights and the skills they had acquired.
- Statistical methods were used to evaluate the results of the experiment. The collated data from the didactical tests were analysed. Correlative analysis was undertaken, as was analysis for the verification of differentiation.

Experiment, experimental method

This research method provides the opportunity to manipulate variables in order to discover deeper causality. We used a variety of data collection methods (e-tests, standardized questionnaire) as part of the experimental procedure. It is therefore a research method which utilizes synthetic options from other research methods.

The independent variable is considered to be the e-learning for specialized language education, whereas the results of term tests and oral presentations are considered to be the dependent variable.

E-tests

At the beginning of the research we used the well-known questionnaire method. The questionnaire helped to establish a number of key factors, namely the type of secondary school the student had graduated from (secondary language school, grammar school, etc.), their gender, study field, and their chosen foreign language for further study. Didactic tests were used to evaluate the output of the specialized language education as taught through traditional teaching methods and through e-learning. The tests were modified standardized (normalized) term tests in electronic form (e-test) used for the

teaching of Professional English and German at ITB in České Budějovice (see links below):

NEP_1

https://is.vstecb.cz/auth/el/5610/leto2014/NEP_1/odp/NEP1_29_5_8_00_D215_Lejskova.qref?info

NEP_2

https://is.vstecb.cz/auth/el/5610/leto2014/NEP_2/odp/NEP_2_LS2014_1.qref

AEP_1

https://is.vstecb.cz/auth/el/5610/leto2014/AEP_1/odp/AEP_1_18_6_11_40.qref?info

AEP_2

https://is.vstecb.cz/auth/el/5610/leto2014/AEP_2/odp/AEP_2_21_6_8_00_JS.qref?info

ATP_1

https://is.vstecb.cz/auth/el/5610/leto2014/ATP_1/odp/CAP_ATP_1_17_6_13_15.qref?info

ATP_2

https://is.vstecb.cz/auth/el/5610/leto2014/ATP_2/odp/ATP_2_24_6_8_45.qref?info

NTP_1

https://is.vstecb.cz/auth/el/5610/zima2013/NTP_1/odp/NTP_1_11_2_11_30_D315.qref?info

NTP_2

https://is.vstecb.cz/auth/el/5610/leto2014/NTP_2/odp/NTP_2_14_6.qref?info

Some authors (Hambleton, Eigner, Rovinelli 1980) also use the term “quazistandard tests”. When compared to the tests at ITB, these “quazistandard tests” are often more accurate than teaching tests because they include assessment standards, however the standardization is not complete. Didactic tests help to determine the level of knowledge of one subject in multiple parallel groups, classes in one school, or even in several schools. Quazistandard tests were used to identify and assess the performance of individual students at ITB following the second and third year degree programs of Economics and Management, and Construction. The tests examined the "output" level of the professional and linguistic knowledge of the students of English and German. They also provided valuable information on the effectiveness of the teaching of the individual language subjects.

Oral presentation

The close of the third and fourth semesters was marked by oral presentations by students on a professional topic (economic or technical). Caha (2011) analyzes and summarizes the most common mistakes in the oral presentations. The students are required to prepare a given topic in PowerPoint (content, form) and present it to a Commission. They must also be able to answer follow-up questions as necessary. The

required level of oral expression corresponds to the CEFR B1+ level for productive skills. The oral presentation should last 15 minutes (Economic topics for oral presentation include: Banking sector; Money; Euro; History of the Euro; Payments; Marketing and its tools; etc.; Technical topics for oral presentation include: Building materials and their typical properties; Buildings; Dams and their Significance; Preparation and construction; etc.). The preparation and implementation of the presentation may be a part of a project whose output is a comprehensive set of skills and competencies that students should be able to apply successfully in their future professional careers (Caha 2012; Caha, Šulistová 2011).

Course

Individual performance evaluation took place in the academic years 2012/2013 and 2013/2014. The points awarded for the written tests ranged from 0 to 70 points. The valid ratio for the final result, based on the assessment of the final written (e-test) and oral tests, was 70 % and 30 % respectively. For the purpose of the survey, respondents were required to provide a certificate at CEFR B1 level to prove their initial "input" language skills.

Processing and data analysis

Identification data and data from the achievement tests were assigned to tables in Excel. The basic descriptive statistics were determined and the hypothesis tested using the T-test, the most widely used test for middle values. The method of analysis was subsequently refined to work with all the variables for the analysis of variance with repetition (ANOVA). A regression model and "Normal Q-Q Plot" were also utilized.

Results

The results of the statistical processing of the data collated from the research are presented in this section. For clarity, charts and tables are used.

The H1 hypothesis will be tested. To do this, the null hypothesis must be established and tested too. The null hypothesis is in the form of the two middle value consensus. Such hypotheses are tested by t-test, whereby, in a more general form, a match is sought in two middle values without the presumption of conformity variances. This testing is done without any extra assumption that the selections come from a normal distribution (Reif 2000). For sufficiently large samples the corresponding percentile for the critical field is 0,025 and 0,975 of normal distribution. For low ranges that are approximately normal, it is better to use percentiles of student distribution, whereby the number of degrees of freedom is equal to the less extent of choice minus one. These percentiles are therefore used for the results. The null hypothesis is rejected if the absolute value of the test criteria is greater than 97,5 %-quantile of the division.

Research question no. 1:

For a given set of bachelor's degree students, was it preferable to follow contemporary foreign language teaching in the form of e-learning or was it preferable to follow traditional teaching methods?

For this research, we focused on professional language teaching and the learning styles of students at the Institute of Technology and Business in České Budějovice. The basic package consists of bachelor degree students at public universities aged 19 years old and older.

The experimental group i.e. those students who studied vocational language education through e-learning, consisted of 148 students (number F105/M43). The control group i.e. students who were taught foreign languages using traditional education methods, consisted of 335 students (F178/M157). In the experimental group, there were 43 men and 105 women aged 19-52 years (\bar{x} 24,7). In the control group, there were 157 men and 178 women aged 19-33 years (\bar{x} 21,7). Both groups consisted of students in the 2nd and 3rd years of their studies at ITB. The experiment lasted for two years.

Research question no. 1: e-learning versus traditional education

H0: The same average score is attained for e-learning language teaching as traditional language teaching.

H1: A different average score is attained for e-learning language teaching than for traditional language teaching.

Table. 1: Comparison of traditional and modern teaching methods

Form of teaching	VSH	VR	RV
e-learning	78,78	20,37	150
Traditional teaching	78,90	21,34	335
Total	78,86	21,04	485

Source: author

Legend: VSH - selective median, VR - sample variance, RV - sampling frequency (i.e. the number of items in the selection)

From this table we can deduce two things:

1. both groups (traditional education and e-learning) achieve a 79 % rating and the groups are very alike (see the selection median);

2. according to sample variance (VR), the majority of students received ratings of between 65 % and 95 %.

According to the theory, almost all the values are within the range from

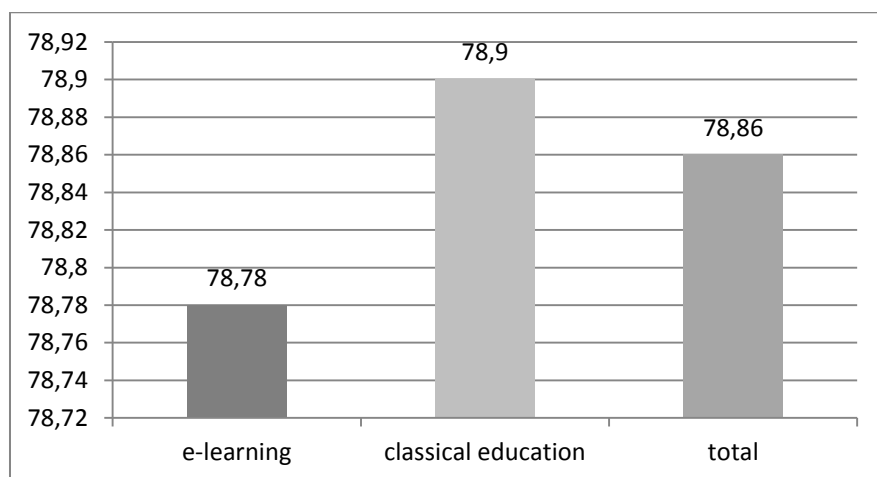
$$78,78 - \sqrt{20,37}$$

to

$$78,78 + \sqrt{20,37}$$

We cannot say what proportion of students achieves results in this period, but it is expected that only a statistically insignificant part of the value is outside this interval.

Graph 1: Average score according to teaching method



Source: author

Conclusion: e-learning vs. traditional education

Is it better for students of bachelor degree programs to receive language education through e-learning or through traditional teaching methods?

The results of the research were not entirely consistent with the assumptions that were made. As can be seen in Table 2, no significant difference between these methods was found. Therefore the nul hypothesis was not rejected.

Table 2: Summary of statistical values for testing H0 vs. H1.

Tested value	0,269
Lower limit of the critical interval (normal distribution)	1,960
p-value (normal distribution)	78,8 %
Lower limit of the critical interval (student distribution)	1,976
p-value (student's distribution)	78,9 %

Source: author

On the basis of the data in Table 2, the test value was calculated according to the generalized two sample T-test. This value was then compared with the critical interval. In this case the values were significantly below the limit and therefore the hypothesis was not rejected. It should be noted that the corresponding values of the normal distribution show how close they are, for large selections, to the values for the student's distribution.

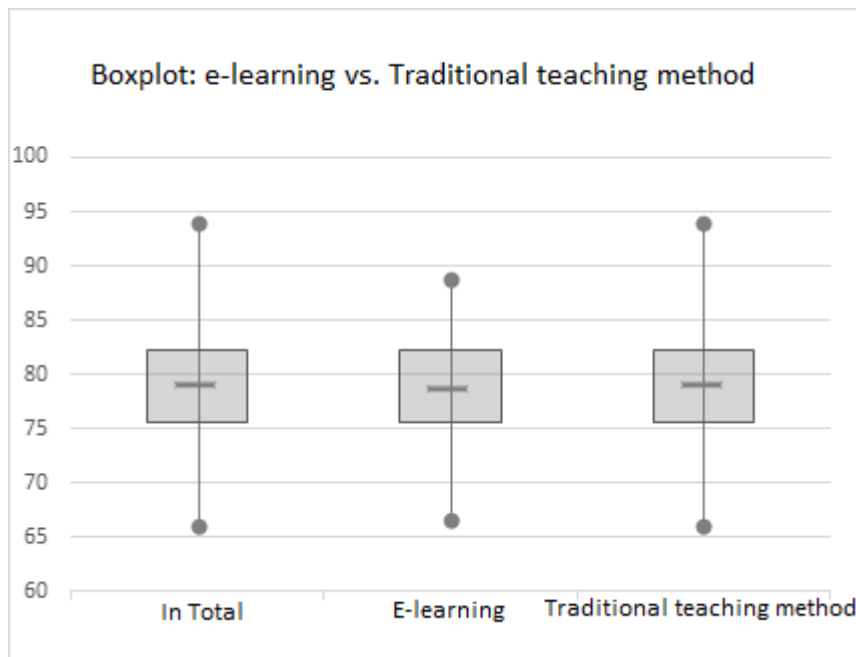
On the basis of the research results it is possible to conclude that computer-aided teaching of foreign languages is an option that can run parallel with traditional teaching methods, but that the positive aspects thereof are no greater than those for traditional teaching methods. In terms of the vocational knowledge of foreign languages, the students of bachelor programs showed comparable outcomes. Computer-aided teaching cannot therefore be considered to be any better or less suitable than traditional teaching methods for the teaching of foreign languages. A combination of both forms is most probably the most efficient, dependent on the aforementioned determinants, and taking into account the personality of the teacher, the student's own personality, and the teaching time (morning, afternoon hours, block teaching, etc.). The list of factors that can affect the use of computer-aided teaching for foreign language teaching is much longer. We believe that it is necessary to use the strengths of e-learning (e-learning on the one hand, leads the student in the learning process, which is a positive aspect, but on the other hand, offers only a relatively small space for their creativity, different ways of thinking and avenues of research) and traditional teaching methods to eliminate weak points. However, finding a suitable balance between e-learning and traditional teaching methods in today's technological times is a difficult task for any teacher.

Based on the statistical evaluation of the data set it is possible to state with a 95 % confidence rate that both teaching methods - e-learning and traditional - lead to the same successful outcome.

From the statistical results and the boxplot below it is not possible to clearly determine the success of e-learning for foreign language teaching. Seeking depending came either

statistically insignificant or even slightly bad for e-learning of foreign languages. The statistical analysis did not show that there was a significant difference between effectiveness of traditional teaching methods and e-learning. The null hypothesis was therefore not rejected.

Figure 1: Boxplot



The conclusions of this research complement those of, for example, Eger, which were presented in "E-learning Evaluation of Case Studies from the Comenius Project" (the material is part of the Socrates Comenius Virtual further education, p. 18). He says "nothing is against the fact, that for a variety of content of various forms and methods using specific funds were achieved the same goals as in a classical education." The combined use of the Internet and textbooks is a suitable tool by which students can access sources of information and is the ideal combination for some degree programs and extension courses. Current teaching methods emphasize independent work and self-study, thereby supporting autonomous, self-directed learning. In this sense, ICT has great potential. This was confirmed by Warschauer (1995) who states, "in an electronic environment the dominance of some individuals in a discussion decreases, the various active students participate equitably in communication, and the language used in the electronic environment is more normal and more complex." Fernandez (2002) in his study analyzes the creation of the learning environment on the Internet for university students, which highlights the potential of the Internet for the development of learning autonomy whilst remaining open to handling the large quantities of material on the Internet.

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Content of civil defence training in Czechoslovakia during the period 1918 – 1939

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Abstract

This article is a reflection of civil defence training as a basic element of education. The research focuses on the period after the Czechoslovak Republic in 1918 to the time before World War II in 1939. The aim of the research is to explore the basic approaches to the implementation of civil defence training in terms of the creation of a new state and in relation to civil defence education in Czechoslovakia. A comparative historical analysis forms the basis of the research into the issue of statehood through education. The comparative historical analysis method is used as a specific tool for qualitative research. This is a procedure which can be applied to the basic elements of the statehood issue in education, through which it is possible to learn more about this phenomenon and subsequently explain it.

Perceptions and ideas about the tasks of the state have gradually changed and evolved. This includes the creation and development of the legal order, and the provision of security and public order within the state. Civil defence training was targeted in such a way as to create an environment in which every citizen, irrespective of their nationality, religion, political opinion and social environment, had the physical and mental ability and willingness to enthusiastically and faithfully fulfil their civic duties.

Key words: Civil defence training, Czechoslovak Republic, Statehood

Introduction

This paper aims to examine the basic approaches to implementing civil defence training under the conditions of a newly-established state in relation to military training in Czechoslovakia. After the collapse of the Austro-Hungarian Empire and World War I, and the establishment of the independent Czechoslovak Republic on 28 October 1918, there

was a new awareness of the need to establish a national identity and national sovereignty. One of the consequences of World War I for Czechoslovakia was a boom in pacifism. This is an attitude that rejects war and violence and seeks to find peaceful resolutions to international disputes under all conditions (Wurmová 1924). The post-war period was characterized by the idea of peace. However, this period was limited by the formation of Czechoslovakia in 1918 and the beginning of World War II in 1939, when Czechoslovakia was split into the independent Slovak state and the Protectorate of Bohemia and Moravia.

Materials and Methods

A comparative historical analysis is used as the method for researching the subject of civil defence training in the Czechoslovak Republic between 1918 and 1939. This method is also widely used abroad (e.g. Gall et al. 2003; Sweting 2001). Each question that we examine in pedagogy has its genesis. "The comparative historical analysis therefore does not only constitute a key method for historical pedagogy, but it is in fact the initial step in resolving any pedagogical issue" (Jůva 2009). Comparative historical analysis is therefore referred to as a method, which, together with empirical research of educational reality, forms two basic sources of information for creating pedagogical knowledge (Maňák, Švec and Švec 2005).

Comparative historical analysis is regarded as a specific type of qualitative research. In general, we understand analysis as the analysis of a certain structure whose essence is the breakdown of the monitored unit into simplified components (Blistanova et al. 2016). This means the conversion of a certain phenomenon - the issue of civil defence training - to its basic elements, by which we can better understand this phenomenon and subsequently clarify and explain it (Juliček et al. 2004). The comparative historical method synthesizes the analogous elements identified via a specific analysis and determines their mutual relations. The comparative historical analysis method identifies similarities and differences on the basis of which it determines analogous context and relations, both external or internal, substantial or insubstantial, etc. (Čapek et al. 1985). The comparative historical analysis monitors and compares civil defence training and military training in development. This method therefore combines two fundamental aspects – historical research and comparative analysis. Unlike empirical research, we are unable to observe it or subject it to experiments (Maňák, Švec and Švec 2005). For this article, the following stages of comparative historical analysis were undertaken (Jůva 2009):

- selection of pedagogical facts, analysis thereof, exact description and organization from a historical and logical point of view in order to create a clear basis for further research activities;
- relational analysis that reveals the dependencies between the studied pedagogical facts and their relationships to the broader social conditions under which they occur

(i.e. inclusion in the cultural, political, social and economic context) – a comparison is carried out during this stage;

- critical evaluation of the results of the previous analysis and comparison (in order to define priorities, relationships, dependencies, and the influences that have shaped the studied pedagogical problems, and which manifested in subsequent development).

1 Content of civil defence training

In the context of the threat posed to Czechoslovakia from Nazi Germany, ever greater emphasis was placed on military training. The task of schools was primarily to help students develop skills for active life and to show them how to achieve joy in life. Under the influence of international events the cultivation of the civil defence ideal was added to this goal. The need for military training was also perceived in schools. It was not the task of schools to raise soldiers, but they were in a position to provide a good pre-military basis. Schools primarily taught discipline and self-control and prepared its students, via practical exercises, in civic virtues: courage, fearlessness, mutual aid and sociability. Schools were also there to look after the health of youths. One of the recommendations for achieving these goals was to go on outings in any weather (Redakce 1935, p. 145).

The basic approach to creating the content of military training was based on the adequacy of the teaching and the development of youths in terms of their mental and physical abilities. The main role of primary schools was to fulfil its basic tasks in the interests of the nation and the state, thereby contributing to the successful fulfilment of military training. Due to the age and physical fitness of the youths at primary schools, it was undesirable to conduct field exercise according to military methods, or even training using weapons. The responsibility for the fulfilment of this task lay with special military training centres. In this way, military exercises and military training were thereby distinguished from civil defence education, which had a much wider base due to the fact that it covered all school youths, including girls (Kepř 1936, p. 4).

One of the basic areas of military training was protection against air attacks. Civilian anti-aircraft protection, which was focused primarily on the protection of life, health and property of the whole and individuals, gradually became a part of civil defence and military training, in particular after the issuance of Act No. 82/1935 on Protection and Defence against Air Attacks. It was necessary that the purpose, significance and measures incorporated in the Act penetrated into those areas where institutional education began, i.e. in schools (Brym 1935, p. 152).

1.1 Civil defence training as education with a new character

The aim of military training was to prepare to defend the freedom of the nation, which was related to social ideals, world peace, international justice and solidarity (Dolenský 1937, p. 37). The basic task of education and training during military training was to

create confidence, recognition of shared responsibility in one's own community, family, school, community and country. The outcome of such education and training can be expressed through two examples:

- in a situation where someone is drowning or a fire has started, a student / citizen should try to save the person and put out the fire instead of screaming and running around wildly,
- a student / citizen knows what they should do, or not do, to be able to help, and will be able to use this knowledge accordingly.

It was recommended to purchase special maps of the specific region in which the school was located. Students were taught to learn how to read a map, and gained practical experience using it in geography, history, and during outings. Another tool was the acquisition of a training telephone set to practice communication. Particular forms of preparation were alarm drills, which were already taking place according to the school rules. Emphasis was placed on more frequent repetition in order to achieve the fastest possible evacuation of the school. Practice air raid alarms were related to moving students to shelters or their rapid dispersal into a field. Furthermore, training masks were also to be acquired. It was recommended to borrow masks for training purposes in areas with a military garrison, or in those where fire-fighters wore masks. A basic requirement of military training also included knowledge of the provision of first aid. Cooperation with the Czechoslovak Red Cross was recommended in this area (Pátek 1936, pp. 19 – 20).

In moral terms, the military training of students was primarily determined by the military requirements placed on citizens, soldiers and their commanders. Positive characteristics included initiative, honour, determination, discipline, loyalty, morality, honesty, bravery, boldness, conscientiousness, obedience, willpower, disregard of danger, physical health, cleanliness and love of the homeland (Dolenský 1935, p. 106). The teaching content and its primary focus, in particular with regards to the Act on Military Training (Act No. 184/1937 Coll.), was also created. In elementary schools, the content of military training was to focus on the theme of home and region, in junior high school on education about the nation, country and the state and in secondary schools, on the rest of the world and friendly and neighbouring nations.

The tasks of military training required from schools were formulated as (Soukup 1932, p. 45):

- carefully and purposefully chosen physical education;
- moral education which aims to create a durable and valiant nature capable of sacrifice;
- a certain level of general education and individual special knowledge which enables citizens to greater usability in defence of their country and which will also benefit citizens in their normal lives;
- proper state-civic education.

The moral content of the military training was focused on caring for the patriotic feeling of the population, living consciousness of nationality, fellowship, loyalty, devotion, self-confidence, respect for the law, a sense for general order and discipline, creation of a positive atmosphere for the perception of civil defence and support of the mental skills and knowledge necessary to increase civil defence. An individual and collective sense of responsibility and commitment to personal and material sacrifices was promoted.

The emphasis on patriotism was seen not only as an emotional matter, but also as a dedicated and vigorous action. Personal benefit and convenience should be subordinated to the interests of the whole. It was necessary to develop a historical tradition as a strong legacy and support (Soukup 1932, p. 44). The poem below is an example of such patriotism. It was written by a citizen of Vodňany in South Bohemia and published in the *Náš domov* newspaper on the tenth anniversary of the establishment of the Czechoslovak Republic (Kavan 1928):

To the fallen soldiers of Vodňany by Ladislav Kavan
(dated 28 October 1928; original in Czech; own translation)

Here in the silence of orchards your monument stands,
the golden glow of your names shines.

Only these golden names link us with you,
as well as the fair memory floating in our hearts
above you as a red and white flag,
When you fought for your homeland with love -
- alas – a deadly bullet killed you.

Your bodies rot somewhere in faraway countries
covered by foreign, heavy soil;
But even if they decayed a long time ago in dark graves
we will always come to thankfully remember you here,
where the glow of your names is engraved in granite,
where many a tear surely dropped to the ground
and a hymn of remembrance we shall sing to you.

You gave your lives for freedom,
for the better future of your nation.
You fought for its trampled rights -
and now we reap the benefits.
How do we thank you? The ten past years stay in our minds,
Here, golden letters in granite glow, saying:
“Keep freedom dear and honour it!”

Kavan’s poem places a strong emphasis on patriotism, the glorification of the heroic and patriotic act and commemorates the foundation of an independent Czechoslovak Republic.

A significant emphasis on the teaching of discipline can also be traced in the literature of the time. Discipline was labelled as a desirable component of the nation's civil defence. The difference in the discipline taught at schools and military discipline was seen in the fact that students were to be guided and raised via useful and relevant teaching resources. Adherence to rigour and discipline was required of adults and *sui juris* citizens. Examples of the voluntary acceptance of discipline included scouting, Sokol activities (athletics and gymnastics) and sports organizations (Brym 1935, p. 153).

1.2 Examples of civil defence training in education

The course outline of military teaching included a lecture series focused on the defence of the state as a form of updated civic education. The topics covered issues such as the state, the military, national defence, military law, offensive and defensive wars, international protection of the population during war, military economics, supplies for the front line and at home, procurement of raw materials, self-sufficiency and the planned economy. In order to ensure defensive training, themes of war and political history were dealt with which placed an emphasis on linking the present with the past and stimulating interest in military activity. In addition, attention was drawn to personalities from the history of the Czech state, as well as examples of the development of its political and administrative organization, including the development of the border. One of the areas of preparation was also Czech literature lessons. Civil defence teaching and education was therefore reflected throughout the educational process. From a psychological perspective, this was mainly about ensuring that the elements of military education were naturally linked to the curriculum, and not artificially or forcibly.

The best subjects for moral military training were civic education and the teaching of the mother tongue – in particular reading, history and singing; preparation for teaching national history, geography, civic education and natural sciences. It was recommended to emphasize Slavic ideas, particularly Slavic togetherness, literature and Slavic languages (Machník 1936, p. 22). According to recommendations, literature was used for military training. Reading books with a civil defence theme was promoted, for example, by the writer, A. Jirásek, and writers from the ranks of legionaries (Matula 1937, p. 50). One of the initiators and promoters of this idea was Karel Votava, who used in his argument the claim that “Clothing, shoes, guns and ammunition are ready in warehouses, but where is stubborn manliness stored? In books and in the thoughts of our great verbal artists.” (Votava 1936, p. 115). The educational value of literature consisted of the development and consolidation of the idea of patriotism, which was the core idea of military training. The development of vigorous patriotism was to be developed during Czech literature lessons through familiarization with the biographies of Czechoslovak writers, who were to be presented as role models. The convincing description of Dalimil's conservatism, the Jesuit church history of B. Balbín, the scientific patriotism of J. Dobrovský, the passion of J. Jungman, the amorous romance of a broken heart by J. Kollár, the last and greatest love of J. Neruda and S. Čech and the dedication

TG Masaryk, were all used to promote an active approach to civil defence (Votava 1936, p. 116).

History was also recommended to promote the idea of civil defence, particularly historical writers and teachers of history. Society is not determined only through a summary of individuals - a certain relational structure and rules also belong to it. These bonds are not created "ad hoc" or over and over again from the beginning with no relation to the past, but rather they build on what has already been (Machula 2015, p. 7). Society carries within itself a legacy of the past and it was possible to utilize this fact to consolidate and expand military training. Watching human development and the development of the nation therein, its historical mission and the constant struggle for existence provided many opportunities for effective civil defence education and cultivating traditions. It was pointed out through historical examples that those who manifested themselves as weak were the ones who were in danger. The teaching of history was therefore conceived not only as "magistra vitae" - the teacher of life, but mostly presented as a "magistra virtutis" - the teacher of bravery (Matula 1937, p. 48).

In terms of military training, history was to indicate the outline of the technical development of weapons and the methods of warfare, as well as highlight the ideals for which people fought their battles. The methodological direction was determined by the idea that the state was "Strengthening our spirit through the heroic deeds of our ancestors" (Dolenský 1936b, p. 7). The aim was to empathize and stimulate love for the nation on the basis of situations and personalities taken from the nation's history. The relationship of history to military training can be seen as ideological and factual. The ideological correlations consisted of recognizing how the nation's ancestors fought and defended the ideals that were constantly recognized and towards which society was directed. The context of the struggles and efforts of ancestors to hold on to such ideals resulted in the creation of national and military traditions, which formed an important moral factor. The following are examples of the topics that were recommended (Dolenský 1936, pp. 59 - 161):

- How Prince Svatopluk redeemed his betrayal
- Czechoslovak legions in Russia
- The battle of Zborov
- Not for gain, not for fame!
- How Czechoslovak legionaries died
- Honour orders you to be unselfish.

A concrete example of the preparations for civil defence in primary schools was the inclusion of military training during the education of natural sciences - natural history (Smékal, Úlehla 1930). There was an introduction to the theme in three main areas - breathing, poisonous gases and civilian anti-aircraft protection. In terms of teaching, basic information was provided and explained about the oxygenation of the body during breathing, as well as the possibility of poisoning and the lack of oxygen supply to the body. In this context, the principle of gas masks or protective masks, filter functions and

the use of so-called activated carbon in air filtration were explained. In connection with the defence of the population, the possibility of sheltering, making shelters more resistant and making sure they had the basic equipment for survival were dealt with. Poisonous gases were characterized as weapons of war and classified according to their harmful effects on the human body. Civilian anti-aircraft defence was presented with the aim of increasing the protection of the population during air raids. The civilian anti-aircraft service included:

- Warning and alarm service;
- Public order policing - supervision and intervention;
- Firefighting service - extinguishing of fires;
- Samaritan service - provision of first aid, locating injured people;
- Decontamination service - marking and cleaning-up of contaminated places;
- Communication service - monitoring the effects of air raids, transmitting reports, connecting teams;
- Concealment service - masking important buildings and facilities.

The issues of protecting the respiratory tracts and anti-aircraft protection were also included in the education of subjects such as chemistry, physics and natural history. The teaching of chemistry was closely related to the use of hazardous materials and war chemicals. In addition to the production of chemicals, knowledge of protective filter properties, neutralization and decontamination were all important. When physics was taught, explanations focused on the basics of aviation, weapons and the telephone (Jirkovský 1937, p. 126). It was possible to support the interest of teachers and students in military preparations and training by adding the appropriate regulations, textbooks, manuals, murals, samples, etc., to libraries.

Educational significance was also attached to singing lessons. One example of an important song of the time is the Hussite hymn "Ye Who Are Warriors of God". Singing was used to accompany rhythmic exercises in a gym, in particular marching exercises (Machník 1936, p. 29). Another example of the role of singing was the creation of so-called school anthems, of which the one of St. Wenceslaus General and Civic School in Strýčice, near Čakov, in South Bohemia is reproduced below. The author is unknown (taken from Dolenský 1937, p. 142):

1. We are the children of the Šumava foothills,
fields and forests, that's our
paradise.
We shall bring goodness, beauty
and health to our native land.
2. We shall protect our
motherland and nation,
firmly stand on our soil,
love our language and ancestry,
properly live and work.
3. Our school is a solid wall protecting
Czechness, our state and humaneness,
There is a good seed of virtue, love
and morality in our hearts.
4. Let's lead our land in concord
to progress and agreement,
let's boldly defend the republic,
its flag, honour and freedom!

At schools, physical military preparation was incorporated into the teaching of physical education, whereby an emphasis was placed on doing exercise in the open air (paragraph 3, Section 12, Act No. 184/1937). At schools where physical education had not yet been implemented, it had to be provided as a compulsory subject. The existing two physical education lessons per week were considered inadequate and it was recommended to have at least three lessons (Pátek 1937, p. 98). The health of youths was simultaneously being tackled in relation to physical education. In addition to the revival of physical education, such an approach also required an adjustment on the part of the school system in terms of hygiene. Overall, this process was known as eubiotics (Štorch 1929, p. 27).

Decree No. 26.969-I/35 on the Civil Defence Education of National School Students, issued by the Ministry of Education and National Culture on 24 May 1935, required schools to place a greater emphasis on suitable games and exercises in nature, orientation practice in the field and marching. The curriculums for council schools (Decree No. 69.485-I-32 issued by the Ministry of Education and National Culture on 9 June 1932) also featured outings as a part of physical education, as well as trips with marching exercises, up to three hours in the first and second grades, with increased demands for the third and fourth grades.

The purpose of marching exercises is characterized by Václav Fiala (Physical education of youths, No. 2, October 1935; taken from Dolenský 1937, p. 143): "The purpose of marching exercises is to accustom students to continuous and regular marching, teach them cooperation and disciplined independence, bring them to readiness and keen observation in nature under various circumstances, teach them to apply their acquired knowledge from various subjects and fields in practice, reasonably harden their health by staying outdoors even in inclement weather and indirectly, or by direct example, familiarize them with national military training". The last sentence could be modified as follows: practically instil in youths the basic elements of military training in the spirit of the democratic system. Within this context, marching exercises were to be organized through games with the aim of stimulating a live interest in students. "Properly planned

marching exercises according to a particular season with the participation of history, geography and science teachers should be directed towards the love of one's native land as the basis for love of the homeland." (Dolenský 1937, p. 144).

In terms of its content, military training dealt with the overall training of a new character. The core subjects in the educational part of the military training are given in Table 1. This training took place through (Matula 1937, p. 50-51):

- physical education, gymnastics, sports, races, physical work, endurance, self-control and dexterity;
- mental education for the love of home and patriotism education;
- singing, outings, appropriate literature, discipline.

Table 1: Core subjects in the educational part of military training

Name of subject	Brief characteristics
Terrain studies, maps, scales:	relief, orientation, measuring of lengths, determining position on a map, orientation according to drawings.
Orientation:	determining cardinal points, principles of behaviour when orientation is lost, marching according to orienteering compass.
Signalling:	Morse code, agreed signals.
Determining distances, distances on a map:	measuring distances in strides, estimating distance, measuring.
Evaluation and use of terrain:	exploration of terrain and possibilities of its use, outlook, shelter, its modification, concealment – masking, daytime and night activities.
Observation and reporting:	choice of observation point, training of memory during terrain observation, reporting, daytime and night observation.
Defence against airplanes and gases:	civilian anti-aircraft defence, basic knowledge of the use of gases during a war, use of protective masks and training, alarm service, behaviour of the population, fire-fighting service, types of airplanes and their labelling.
Health education and first aid:	diet and lifestyle, physical exercises, treatment of injured persons, first aid kit, physical hardening, effect of food on performance.

Cooking:	preparation of tea and soup, preparation of open cooking fire.
Shooting training:	weapon studies, preparation for shooting, shooting safety, target shooting with airguns, ballistics, sighting.
Supervisory and guard service:	purpose and essence of the service, commanders, guards.
Camp building:	building of tents and their subsets, emergency shelters, waste pit, latrines, emergency winter shelters, woodcutting.
Intelligence:	receiving reports and their interpretation, monitoring and reading of trails.
Contacts and connecting:	knowledge of timetables, use of telephone and telegraph, swimming and rowing.

Source: Matula 1937, p. 57.

Teaching was organized in such a way that the theoretical part was done in classrooms in the winter months and the practical work (marching exercises, field games and camping) outside in the summer months. The teaching of first aid and protective services was carried out as a part of the subject "military techniques". This subject included the application of first aid during defence, house and factory fires, explosions, and during gassing. It also involved active technical assistance, the procurement of tools, equipment, materials and transport vehicles, the setting up of shelters and the adaptation of buildings for military purposes, as well as auxiliary services during evacuations, intelligence services, cycling, supply services and others.

During military training, further emphasis was put not only on obedience and following orders, but also on the ability of students to lead others. The ability to lead others also included responsibility for this activity. For this reason, many schools implemented so-called student self-governments. The opportunities to be taught leadership were a part of gym classes. Whenever possible, during order drills and marching / hiking exercises, teams were split into smaller ones with the command thereof entrusted to either an older or selected individual. This supported the responsibility of the individual for a group and taught independent decision-making (Hala 1936, p. 117).

The need for a comprehensive understanding of military training throughout the educational system caused teachers some difficulties. Military training courses for primary and secondary school teachers, and reserve officers, were therefore held at the end of the 1937 school year. They were organized by the Ministry of National Defence and the Ministry of Education and National Culture and held in Prague, Brno, Bratislava, Banská Bystrica and Košice. The practical exercise classes were assessed particularly

positively. The courses were attended by several hundred teachers (Magazine for Civic and Military Training 1937, p. 110). With regards to educating teachers, Obdržálek mentions that in the second half of the 1930s, courses began being organized for teachers which focused on the interpretation of military training at schools, on the basics of military disciplines, elements of military training in individual subjects and physical education tasks as a part of military preparations (Obdržálek 1977, p. 23).

Of no less importance was the issue of teaching and preparing university students. In 1934, of its own initiative, the Association of Slovak Students at the Comenius University in Bratislava organized pre-military education. The chancellor's office supported this activity and commissioned a physical education instructor to prepare it. Based on this activity, the Comenius University in Bratislava put forward the proposal to implement mandatory pre-military preparations in the form of proper and systematic physical education carried out according to physiological rules (Obdržálek 1977, p. 23).

Given the diversity of the focus of universities, military training was not implemented as a unified subject on a compulsory basis. Reports on military training lessons can be found at those universities with technical specializations such as Prague, Brno and Ostrava. At these universities there were lectures on military topics such as military techniques, an army in the rear, interpretations of the military and its development, ballistics, national defence and cartography. However, the topics did not include the issue of civilian anti-aircraft protection, which was crucial at that time (Krýsa 1938, p. 107).

The Scientific Military Institute issued publications called *The Military Training Handbook, Higher Level* (1936); *The Military Training Handbook, Lower Level* (1937). These publications and others e.g. the *Magazine for Civic and Military Training* (1936), contained information, knowledge and explanations for teaching purposes on the recommended and useful skills for every citizen. Schools were charged with contributing to the military preparation of youths, in particular in the moral and physical area. These publications reflected, to a certain extent, a comprehensive summary of the findings and the overall perception of military preparations.

The task of school education, in particular physical education, was twofold. Firstly, the targeted civil defence education of students so as to establish an understanding of the defence and protection needs of the population against air attacks. Secondly, to improve efforts to raise healthy children who were able-bodied, strong, skilful and daring (Machník 1936, p. 29). Physical education meant developing strong and healthy adolescents. This included promoting the benefits of a hygienic lifestyle, healthy eating habits and outdoor exercise and work on the growth of children, as well as highlighting the harmful effects of not following the advice. In short, to promote exercise as special systematic care for (a person's) health (Štorch 1929, p. 98).

1.3 Moral civil defence education

Teachers have always been one of the drivers of development and their opinions had an impact on the direction of thinking. In these terms, teachers were seen as individuals sharing responsibility for the moral civil defence education of youths and the nation. The idea of military training was not an unfamiliar issue; Tyrš's ideals were known in the period between the world wars, in particular amongst members of the Czech Sokol Community, where they were reflected in the spirit of the Legion during the First World War. In this spirit, military training covered the entire nation. "It is a persistent, deliberate and sustained impact on the whole nation in order to raise all the physical, mental and social skills to repel attacks on the cultural, economic and political autonomy of the nation in peace and in war." (Dolenský 1937, p. 4).

In terms of morals and civil defence, human qualities, which were characterized as properties of will, reason and feelings, were reflected in the education. These properties were then assessed in general and military terms, and in terms of the subject (oneself) and society (see Table 2).

Table 2: Characteristics of human qualities in terms of moral civil defence education

	General standpoint	Military/executive standpoint
Properties of will	<p>COURAGEOUS – UNDAUNTED (towards themselves) The person has full control of themselves, can force themselves, is able to concentrate their energy into performance and overcoming obstacles</p> <p>DISCIPLINED (towards society) Subordinates themselves to a higher will, interests of society, nation and humanity</p>	<p>VALIANT (towards themselves) In battle the person overcomes their fear, is led by the love of their friends and nation, develops all of their energy to overcome the enemy and danger (the opposite - cowardly)</p> <p>OBEDIENT (towards society) Knowingly and voluntarily subordinates themselves to the will of their superior with higher responsibility (the opposite – treacherous)</p>
Properties of reason	<p>TRUTHFUL (towards themselves) Desires knowledge, acknowledges only the truth, is an opponent of lies</p>	<p>MILITARY PROFESSIONAL (towards themselves) Complements his education, is thinking and inquiring (the opposite – ignorant, uneducated)</p>

	<p>IMPARTIAL (towards society) Comes to conclusions carefully, objectively and impartially both towards themselves and others</p>	<p>EXACT (towards society) Fulfil orders and duties in a complex manner (the opposite – negligent, disorderly)</p>
<p>Properties of feeling</p>	<p>HIGH-MINDED (towards themselves) Tries to be a virtuous, perfect gentleman</p> <p>HUMANE (towards society) Actively and energetically acts towards their fellow men and humanity</p>	<p>PERSEVERING (towards themselves) Uses their own power and possibilities to achieve a moral goal, does not surrender to pessimism and defeat (the opposite – indifferent)</p> <p>SELFLESS (towards society) Resolved to prove their love to friends and motherland through their work, suffering or even death, is sociable and a patriot (contrast – cruel egoist)</p>

Source: Dolenský 1937, p. 5; adapted by the author

The perseverance and constant harmony of the combined qualities of will, reason and feeling, constituted the moral character of the individual.

Conclusion

Civil defence education, and thereby the issue of statehood, primarily focused on awakening an individual's love of their country, nation and state, as well as instilling a sense of duty thereto and encouraging efforts to protect one's home. The aim was to focus an individual's mental and physical strengths towards the defence of the state. Civil defence education, in its broadest sense, and military training were therefore emphasized and deepened at schools. Civil defence education was clearly seen as a certain foundation and a precursor to military education. School training supported the subsequent physical fitness of the army, and its spirit. The foundation for defence training and education of the entire nation from childhood was therefore laid out. The basic idea was that advanced military abilities could avert a war, or at least reduce its negative consequences.

A nation that was considered safe was one that educated its population to carry out creative activities with the same care as that used for raising defence awareness. Civil defence education was in the nation's vital interests, and the level thereof was a contemporary measure of security (Kováčová, Vacková 2015). Civil defence involved a sense of responsibility, duty, order and discipline, and was also an expression of patriotism and civic solidarity. The aim was to support civil defence for the entire population, regardless of age and whether they were subject to military duty.

In the first decade of the Czechoslovak Republic, the state did not pay specific attention to the issues of military training, and military training at schools was not implemented during this period. The cultural and political events in Europe after 1930 stressed the need for the implementation of systematic preparations for military training. From 1932, cultural, sports and other organizations organized various activities through which they wanted to increase the civil defence capabilities of the population.

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Metaphors of memory: Count Kokovtsov and his “Fragments of memories”

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Abstract

This article is devoted to the reconstruction of “Fragments of memories of my childhood and the time in the Lyceum”, the memoirs of Count Vladimir Nikolayevich Kokovtsov, the former Minister of Finance and Chairman of the Council of Ministers of the Russian Empire. The history behind his words is analysed, as are the circumstances surrounding the transfer of Kokovtsov’s memoir to the State Archive of Belgium (Archive of Royal Museum of the Armed Forces and Military History in Brussels), and the history of its publication over many decades. “Fragments of memories” is compared with “Out of my past”, another memoir written by Count Kokovtsov. The author of the article tries to understand the peculiarities of the construction of the past by the representatives of the imperial bureaucracy, to reveal the specifics of its memorial culture and identity. Kokovtsov’s memoirs are remarkable within the context of Russian emigration memoiristics. They reflect the ambitions of an old Russian bureaucrat who survived the existential tragedy of exile and who tried to find moral support in the past.

Keywords: Count Kokovtsov, Russian Empire, Russian Imperial bureaucracy, Russian emigration, historical memory, memoirs, Rossica, Imperial Alexander Lyceum.

Introduction

In recent years, the interest in historical studies with regards to imperial elites, parliamentarianism, political parties and social movements in Russia in the early twentieth century, has increased significantly. Simultaneously, traditional subjects related to the history of the State, foreign policy, social conflicts and the specifics of Russia’s modernization, have started to be interpreted in new ways. In this regard, the figure of Count Vladimir Nikolayevich Kokovtsov (1853–1943) was a significant one. He was a prominent politician of the Russian Empire in the early twentieth century. Kokovtsov served twice as the Minister of Finance (in 1904–1905 and 1906–1914) and was Chairman of the Council of Ministers (1911–1914). His name is often spoken of in conjunction with such distinguished reformers as Sergei Yul’evich Witte and Pyotr Arkad’evich Stolypin. After the Revolution of 1917, Count

Kokovtsov emigrated from Soviet Russia. He settled in France, where he eventually died (Kovalev 2015, pp. 151–169). Nowadays, numerous publications are written about him. Yet, he is not considered to be of the same calibre as other major Russian reformers. Much of the research on the Count focuses on his state activities (Veber 2000; Zaytsev 2003; Vekshina 2008; Gaida 2011). His private life, public activities, work in banking and personal memoirs have, until recently, not been studied in detail because they drew little interest from researchers.

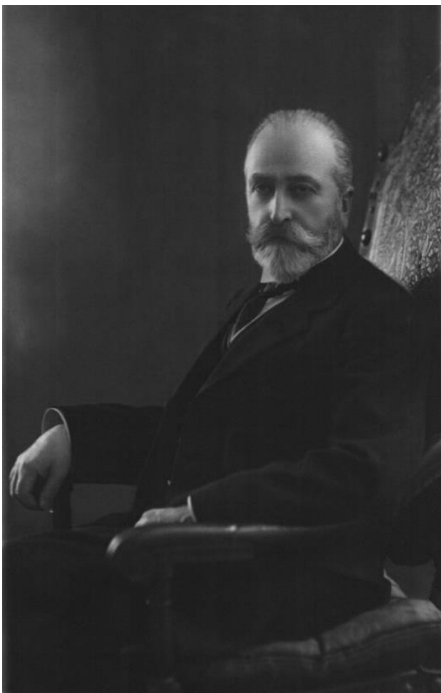
In 1990–2000, many memoirs of prominent Russian public figures and politicians from the first quarter of the 20th century were published and republished. This made it possible to expand the knowledge of the Russian Empire during the period of social, economic and political transformation. The memoir of Count Kokovtsov, entitled “Out of my past”, which was written in Paris and first published in 1933, was among the published texts (Kokovtsov 1933). The English translation of this book appeared soon afterwards (Kokovtsov 1935). The memoir of the Russian statesman aroused great interest among his contemporaries (Churchil 1936, pp. 509–511; Florinsky 1936, pp. 306–308; Kohn 1936, pp. 236–237). Today, it is impossible for any serious researcher to not consult it when seeking to reconstruct the history of the last years of the Russian Empire under the Romanovs. The book contains a lot of information about the political struggle in Russia, the ideological confrontation between the intelligentsia and the authorities, the mechanisms of government decision-making, and Nicholas II and his entourage. However, the memoir of the famous bureaucrat gives no clues as to his childhood, youth, parents, friends, education and start in life. The crucial thing is that little is known about him personally and what circumstances shaped his personality and worldviews. Until recently, only a small number of historians were aware of the existence of another memoir by Count Kokovtsov entitled “Fragments of memories of my childhood and the time in the Lyceum”. In this memoir, the author describes his life in the second half of the 19th century. The book, which fully uncovers his view of life, raises important questions such as: what are the peculiarities of the text and its significance for historical studies? And, what features of the memorial culture of the Russian diaspora is embodied in the text?

In recent times, in Russia, the subject of historical memory has taken a special place in the minds of people. It acquired significance in the late 1980s and early 1990s when unknown pages of history were discovered and old ones were redefined. In this respect, the Russian diaspora of 1920–1930s is an interesting subject to research and is often included in comparative historical and social studies. By using this as an example, it help us to understand how a community builds its past when faced with social and political change, how past experiences are reflected in these structures, and what the dynamics and mechanisms of the commemorative processes are. For Russian immigrants, memoir writing was one of the ways to preserve historical memory. That is why almost all of those memoirs were imbued with nostalgic notes. For the analysis of Count Kokovtsov’s memoirs, the theoretical achievements of authors who have written about the phenomenon of historical memory and memorial culture, are of a great help. These include the works of the French scientists, Maurice Halbwachs and Pierre Nora, the German researchers, Jan and Aleida Assmann, and the Russian historians, Lorina Repina and Olga Leontieva.

The circumstances surrounding memoir writing

In Count Kokovtsov's declining years, he tried to make sense of his experience as a man and a politician. In 1933, his memoir, entitled "Out of my past", was published in Paris. One of the motives for writing his memoir might have been the publication of the memoir of Count Sergei Witte in the early 1920s. In his memoir, Witte gives a lot of negative assessments of his contemporaries and the results of their work. Kokovtsov was also criticized. He was described as a man full of "bureaucratic jealousy for his power", and a social climber who is not reluctant to indulge in machinations, lies and slander in order to pursue his own objectives (Witte 1922, I, p. 332). Kokovtsov was therefore forced to defend himself in his own memoir. He went into great detail about his public activities. He notably avoided reproaching Witte and objectively went about highlighting his public role in the life of Russia. Pavel Nikolayevich Milyukov, a person who did not like tsarist bureaucrats, said of Kokovtsov's memoir, that it represented a historical source of primary importance: "V.N. Kokovtsov rendered considerable services to the cause of Russia, and his memoir conclusively proves it. Subjectivity is not a character trait of Kokovtsov, but a trait of his entourage and position. He remains faithful to it. <...> but he does not reflect upon the later psychological experiences in his memoir" (Musée Royal de l'Armée... XIX-24(a)). However, Kokovtsov writes only about the events of 1903-1919, starting with the resignation of Witte from the position of Minister of Finance, up to his own emigration from Russia.

Picture 1. Count Kokovtsov in Paris in the early 1930s



Source: Gosudarstvennyy arkhiv Rossiyskoy Federatsii, fond 6734, opis' 1, delo 1, list 11.

While living abroad, Count Kokovtsov became one of the founders and active members of the Association of Former Pupils of the Imperial Alexander Lyceum that he graduated from. In 1934, his friends and colleagues of the association asked him to write a memoir about his childhood and youth. He promised to consider the idea, despite having some obvious

reservations. Kokovtsov never kept any diaries and it is for this reason that he feared he could not give an objective account of the past. He was required to recount events that had happened more than half a century previous. Events which were no longer a part of living memory and “were covered with a thick layer of mist, blurred by what happened in the years that followed ...” according to Kokovtsov (Kokovtsov 2011, p. 28). However, the desire to reveal his childhood and youth gradually possessed him. His thoughts and recollections delved ever deeper into his past, with images of his family, relatives and home therefore starting to appear more frequently in his memory. He wrote about this: “They began to gradually protrude from the shadow, from a forgotten time, and became brighter and brighter, refreshing the memory of the most cherished and irreplaceable time of my happy childhood, and led me to my admission to the Lyceum, and then, to many other events which are associated with the time spent in the Lyceum. In explanation of this phenomenon, I will say <...> that my early childhood never left my memory. It marked the firm, indelible foundation of my family’s life...” (Kokovtsov 2011, pp. 28–29). An archetype of a Home therefore appeared in the mind of the Count. This is regarded as the zero point in the coordinate system of the world, and is considered to be a key symbol of culture. The Home preserves and transfers the experience, customs and traditions of previous generations. The emigrant was a man without a Home. The luxury apartments in the centre of Paris could never replace the Home for the old Count. Hence the nostalgia for his parent's estate of Gorna-Pokrovskoye in the Novgorod Province, the longing for the St. Petersburg of his childhood and youth, the poignant memories of his relatives, and about the breakup of his family due to historic events. However, these features were characteristic of the commemorative culture of Russian emigration with its nostalgia for the lost homeland, the happy times of bygone days, and the comfort of domestic life (Megreleshvili 2010, p. 256). On the one hand, Kokovtsov’s recollections cast sad thoughts, but on the other hand, he sought to find harmony in the past. As a result, he set pen to paper, and by 1937, he completed the manuscript “Fragments of memories from my childhood and the time in the Lyceum.” It is still difficult to say with certainty whether Kokovtsov had any specific publishing plans. However, it is known that he acquainted the members of the Lyceum Association in Paris with the manuscript of his memoir. Mentions of this can be found in a letter dated 19th April, 1938, in which lyceum students congratulated him with his birthday: “We have all read these texts with reverence, and they brought back the memory of our years at the Lyceum and reminded us about everything we owe to our dear Lyceum” (Musée Royal de l’Armée... XIII–G16).

Unfortunately, the memoir was not published during Kokovtsov’s lifetime. In 1937, the Count’s manuscripts, including the “Fragments of memories”, were deposited in the Royal Museum of the Armed Forces and Military History in Brussels. Typewritten copies of the Count’s memoir were found in the possession of his heirs, who then gave one of the copies to the Bakhmeteff Archive in the United States. It is these very texts that researchers use for their work today (Lieven 1989, pp. 91, 113–114, 118). In the meantime, the materials deposited in Brussels lay forgotten for decades. In 2007, a historian, Sergei Mikhaylovich Nekrasov, published a fragment from Kokovtsov’s memoir (Kokovtsov 2007, pp. 125–159). He did so on the basis of a copy which had remained in France in the personal archive of Kokovtsov’s grandson, Patrick de Fliegé. It wasn’t until 2011 that a full version of the Count’s memoir was prepared for publication. This was made possible through the joint efforts of

Russian and Belgian historians. The typewritten manuscript that contained small handwritten notes made by Kokovtsov formed the basis for the prepared manuscript (Musée Royal de l'Armée... XIX-17). No other draft versions or additional materials were available. The Count had apparently given only the final copies of his work to the museum in Brussels, including the final manuscript, dated 28th May, 1937 (Musée Royal de l'Armée... XIX-16).

Keys to the past

Kokovtsov's "Fragments of memories" are notably different from his memoir about the time of Nicholas II. As noted by Andrei Valentinovich Mamonov, Kokovtsov when creating the book "Out of my past", once again plunges into the political struggle he recently took part in. He comes back to debates about the fate of an already collapsed empire, as discussed in emigrant circles. The belief that the actions that were undertaken were right had to drown the bitterness of defeat and the mistakes made (Mamonov 2015, p.194). On the contrary, in "Fragments of memories" he deliberately avoids anything that could be relevant in the 1930s. He writes about a time that few people remember. In so doing, he is not reaching out to his contemporaries and future generations, but only to himself.

"Fragments of memories" are chronologically arranged and, in contradiction to the title, are not abrupt, but complete. They mainly cover the period from the beginning of the 1860s until the 1880s. The text can be divided into three parts. The first part is dedicated to the time of Kokovtsov's first conscious impressions and his life on the family estate of Gorna-Pokrovskoye prior to his admission to the Imperial Alexander Lyceum in 1866. The second part is about his time at the Lyceum from 1866 to 1872. The third and the smallest part by volume looks back at his beginnings in the civil service. Unfortunately, the Count only touches the surface when describing the start of his bureaucratic career. He very briefly talks about his service in the Ministry of Justice during the period 1873-1879, about his work in the Central Administration of Prisons of the Ministry of Internal Affairs during the period 1879-1890, about the transition in the Department of the State Economy of the State Council in 1890, etc.

It is known that Kokovtsov, prior to starting his memoir, confessed to being hesitant about reconstructing events "long gone" because he was not sure that he could recall faded images of the past. It is important to note that in the middle of the 1930s the former Prime Minister had turned ninety. It is for this reason that he understandably hesitated, struggling between his sense of duty and doubts about his own memory. The "key" to the past (in the Count's own words), and the impetus for the memory flow, were recollections from his childhood and images of relatives. This allowed him to organize the system of memories about the times of his childhood and youth. It goes without saying, that the author uses chronological detours which is usual for the genre of memoirs. This in no way affects the overall impression of the integrity and consistency of the facts and events portrayed.

Kokovtsov needlessly worried that his memory would let him down. The memoir features many small important details of the beginning of a great life journey within the apparatus of a huge empire. "Fragments of memories" neither features references to Chekhov's Russia, the nobility, the powerless reflexive country, nor about rioting Russian intelligentsia. Similarly, no

mention is made of, or descriptions given of, Russian aristocracy or the imperial luxury they lived in. What Kokovtsov's memoir does do, is paint an image that allows us to better understand the Russia of the pre-reform years, which was hardly fitting for the industrial era. The memoir also clearly demonstrates the tortuous path that was followed in the creation and construction of the new Russia, and of the heavy social and cultural transformations of the time. For this reason, Kokovtsov avoids stylization and excessive sentimentality in his memoir. This contrasted strongly with the typical memoir culture of emigrants in which the idyllic adoration of a bygone Russia was usual. The Count's memoir also does not feature any speculation as to why the Russian Empire "suffered a wreck" along with the whole world. Kokovtsov combines a deep resentment of historical events, especially the Bolshevik Revolution, with a willingness to accept the inevitable. His memoir reflects the pain, rather than any bitterness, of the losses suffered. People did not cause the hostility and malice. However, Kokovtsov does not ponder on the general, but rather focuses on specific individuals. He writes with great admiration about the commoners who surrounded him on the family estate during his childhood. In his memory, the peasants were "his people" and were perceived to be a part of the large patriarchal family. It goes without saying that Kokovtsov maintained the status quo, but he was never arrogant about it. Patriarchy became one of his main values and a measure of harmony for him. It lay at the heart of Kokovtsov's religious beliefs, which never bore a pretentious character. "Fragments of memories" gives an insight into this and the reason why his personal religious experience contributed to his acute resentment of Grigori Rasputin. It is also clear from the book that domestic life shaped his identity more than his education or schooling. At the same time, the years spent at the prestigious Alexander Lyceum took a central place in his memoir. Kokovtsov describes this time in great detail, vividly depicting his teachers and classmates. The scenes in which he describes the fellowship and mutual support, express sentimentality. It turns out that a friendship started at the Lyceum lasted a lifetime. This is true of Kokovtsov's closest friend, Eduard Dmitrievich Pleske (1852–1904), with whom he went up the corporate ladder. After Pleske's premature death in 1904, Kokovtsov took his place as Minister of Finance. He also became close friends with one of his young teachers Nikolai Stepanovich Tagantsev (1843–1923).

It seems that the great value of the memoir is in the details, the small things that are carefully reproduced by the author. The image he creates breaks many stereotypes. For example, when one tries to typify who Count Kokovtsov was, the answer, more often than not, is that he was an aristocrat, a scholar, a high-calibre professional. It is therefore a surprise to realize that he is an author of memoirs: "I can confess that the in the years up to 1860 I did not learn anything <...> We did not have any children's books and ABC books, and I do not even know if there were any in other well-to-do families in the countryside. My first textbook was a newspaper "Severnaya Pochta" ("The North Mail"), which arrived just two times from a post office <...>" (Kokovtsov 2011, p. 37). It is curious that this was being said by a man who was considered to be the embodiment of Saint Petersburg bureaucracy, a man, who after his graduation from the prestigious Lyceum, served exclusively in metropolitan institutions. However, his words capture what real life was really like for provincial Russian nobility, isolated as they were by the boundaries of their estates and surrounding neighbourhoods. The Count's own ancestral estate of Gorna-Pokrovskoye was a typical example, being almost

150 versts (160 km) from the nearest railway. Kokovtsov had to deal with a lot of domestic and economic problems too, which meant life conditions were quite modest. When Kokovtsov was sent to study in the capital, he was forced to live modestly and frugally too. On the other hand, it is clear from the memoir that such life conditions prepared him well for the high levels of hard work and responsibility he was later to undertake.

Kokovtsov's memoirs disprove the long established stereotype of the Russian elite being closed, as well as the belief that in pre-revolutionary Russia only the chosen ones who had the connections and noble origin could make their way up the corporate ladder. He does not deny the existence of such phenomena in Russian life, however, the example of Kokovtsov himself clearly proves that there were other life scenarios. He became the Russian equivalent of what in the West is called a "self-made-man", through hard work learnt during his childhood, a clear understanding of the ways to achieve a goal and spiritual strength. He also managed to achieve the great heights he did without the means and connections, being admitted to the Lyceum from a grammar school, to be later invited to attend University, and then to serve the State.

Conclusion

In his memoirs, Kokovtsov hardly writes about the events of national importance which he witnessed at the beginning of his bureaucratic career. Nevertheless, these events are important for the understanding of Russian political history at the turn of the 19th to 20th century. They bring across the conditions under which the bureaucratic worldview was formed by those who ran the empire prior to its destruction.

The memoirs are full of descriptions of everyday life, values, worldviews of the Russian nobility and bureaucracy, tales of pedagogical practices and educational institutions, and of the household culture of the students attending the Lyceum. In addition, they contain a lot of interesting information and opinions about the political and public figures surrounding Kokovtsov. His texts are remarkable in the context of Russian emigration memoiristics. The catastrophic events that catapulted him into exile, happened right before his very own eyes. These events had a serious impact on people's faith in natural social evolution and progress. They led to a reassessment of traditional values and instigated many people to think about pressing issues such as relationships between Russia and the West, people and intelligentsia, government and society. Historical memory also underwent profound change under their influence. On the one hand, exile brought forth an interest in subjects that might inspire pride in Russia, its people and its culture, but on the other hand, it forced people to think about the historical roots of the disaster they had experienced. Many were tormented by the question: how did the Russian empire disintegrate so rapidly? Was it historically doomed? Or, did the Russian imperial project stand a chance, and the catastrophe could have been avoided? (Kovalev 2012, pp. 323–325)

Kokovtsov's memoirs reflect the life ambition of an old Russian bureaucrat who survived the existential tragedy of exile and who tried to find moral support in the past. The preservation of images of the lost homeland and the ruined world created some kind of a bridge over the chasm, which bound the broken thread of time. The publication of Kokovtsov's memoirs has

enriched historical science by providing it with a valuable resource that will be used by historians both now and in the future.

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Anti-corruption discourse as a feature of political system change.

The case of the Dutch Republic in 1650–1651

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Abstract

This article puts forward a proposal for the broadening of the research agenda on corruption through a twofold change in perspectives, namely concentrating on the “corruption talk” in place of essentialist views, and addressing anti-corruption in place of corruption. An evaluation is undertaken of the role of anti-corruption discourse in times of political change on the basis of the Dutch Republic in the mid-seventeenth century. Analyzing the exemplary speech by Adriaen Veth against corruption, given to the Great Assembly in 1651, and the role of the figure of Cornelis Musch, this article depicts the anti-corruption discourse as an important tool of argumentation for the newly established regime to gain legitimacy with regards to both its theoretical foundation and for the process of coming to terms with the previous regime.

Keywords: Anti-corruption, Dutch Republic in the 17th century, Great Assembly, True Freedom, republicanism

Introduction

“Corruption comes in many forms (not just mere bribery) and it is necessary to define at the beginning, what types of actions in this work are considered as corrupt and what not” (Naxera 2015, p. 21).¹

Corruption seems to be one of those subjects of scholarly research which still requires a thorough definition before being used (Méndez 2010). The customary description as an “abuse of entrusted power for private gain” is no longer sufficient in capturing all the facets of the phenomenon to which the label of “corruption” has been ascribed. Indeed, the very phrase “facets of a phenomenon” already presupposes corruption to be a

¹ „Korupce má mnoho různých podob (nejen prosté úplatkářství) a je nutné, abychom od počátku jasně uvedli, jaké typy jednání jsou v této práci považovány za korupční, a jaké nikoliv.“

singularity, which only needs to be correctly demarcated by defining which actions are to be considered as corrupt and which are not. This point of view has led to a direction of research which can be referred to as 'the search for a definition'. Corruption is, in this perspective, an essential category that provides us with more or less clear criteria with which to judge and analyse the individual acts that are under scrutiny. In the public sphere too, there is a strong tendency to essentialize corruption as much as possible in order to be able to measure it, to compare its appearance and to compose charts based on these measurements.

This article puts forward a proposal for the broadening of the research agenda on corruption through a twofold change in perspectives when approaching corruption – firstly, the concentration on what might be called “corruption talk” instead of the essentialist view and, secondly, the discourse of anti-corruption. Subsequently, the article ascertains the potential of historical research as a partner in interdisciplinary research on anti-corruption and tries to demonstrate the benefits of the historical analysis of anti-corruption based on a case from mid-seventeenth century Dutch history.

Talking of corruption = anti-corruption

Addressing “corruption talk” instead of “corruption” as such means that we are not primarily interested in the economic context of the phenomenon, its structural-based preconditions, the institutions by which it is supported or discouraged, its economic, social or political impact (for this research tradition, see Rose-Ackerman, 2006), or the economic or psychological incentives of the actors involved, but rather in the processes which led to the formation of individual corruption discourses in which the actors think, speak and exploit corruption. What matters in this perspective is what the actors and societies being scrutinized conceive to be “corruption”, how they handle it and how they are able to utilize the shared (or even contested) meanings of corruption.

In this form, corruption talk becomes a question of influential power. The actors who are able to impose their definition-power on what will be qualified as corruption and what not, are endowed with an important advantage in the political arena. Because of the undisputable negative charge of the term “corruption”, the labelling of something as corrupt might be used to delegitimize the behaviour of others or, on the other hand, to legitimize one’s own behaviour. The analysis of these practices in discourse is aimed at deconstructing the power discourses of the past. For instance, it forms an important part of development policy studies, where researchers aim to question the construction of enemy images through the big players in anti-corruption, such as the World Bank or Transparency International (Harrison 2007). The same might be stated and academically operationalized in the field of domestic policy – it is often not corruption itself that is responsible for the constellation of power and the reputation of the individual actors in the eyes of the public, but their power to define and their ability to enforce their own conception of what is to be seen as legitimate or illegitimate.

For this reason, not the positive approach to corruption, but the negative one, focusing on anti-corruption, might provide us with a better insight into what the actors conceive as corruption. In fact, corruption is seldom addressed (in political speeches, policy papers, media and even research) on its own, but generally as a prelude to a suggested solution or delegitimizing rhetoric strategy. Another reason why it might be beneficial to investigate anti-corruption as opposed to corruption is that we – as scholars – have by definition a better provision of evidence of the means of anti-corruption than those of corruption, which generally only come to light if a corruption strategy goes wrong. Concentrating on anti-corruption, on the contrary, allows us to investigate systematic policies and complex rhetoric. This not only applies to “essentialist approaches” (which have also turned their attention towards the analysis of the means of anti-corruption by states or private actors; see Schmidt, 2007), but even more so to the “discourse approach” discussed here.

Addressing corruption in historiography

Compared to contemporary social sciences, historiography is not exposed to the temptation to design improvements or to risk coming into conflict with the participants of corruption when approaching the issue of corruption (cf. Shore, Haller 2005). Since the “cultural turn” it is moreover more sensible to deal with the language, the manner in which enemy images are constructed, the (de)legitimization strategies, and/or the attributed meaning within the scope of the contemporary political culture.

It is the analysis of historical examples from different periods that might persuasively demonstrate that there is no permanent content of “corruption”, but that the contents described through the term, as well as the perception thereof, change over time (Kerkhoff 2015; Kerkhoff et al. 2010). Historians appreciate the changing content of the term and have established the practice of defining its meaning before proceeding to make comments on corruption in an individual historical period or society, aware of the risk of ahistorism if one were to try to impose contemporary measures on historical material (Plumpe 2009). Addressing historical cases of alleged or real corruption (whatever that might mean in the given case) also helps us to understand that “corruption” has never functioned as an objective tool to describe reality, but has always worked as an influential ideological device.

Of course, this attitude does not prevent us from evaluating the individual forms of corruption as they appeared in history and its role in the economic or political system of the time, for example, in facilitating the functioning of the state apparatus. The inquiry into corruption in early modern diplomacy, the corruption practices in the Republic of Venice or the culture of gift giving can be mentioned as examples (Nützenadel 2009; Thiessen 2010; Algazi et al., 2003). However, it might also be the change of what people understand from specific terms themselves that should be examined in order to understand the change in public values, societal norms and the arguments used in public debate (on the basis of the Dutch example see Kerkhoff 2015; Kerkhoff et al. 2011).

The operationalization of corruption and anti-corruption might, on the other hand, serve as a useful tool to describe an individual political culture. How a society and its political bodies position themselves against corrupt practices and how it defines them is considered to be a significant self-description of the system (Grüne 2011, p. 13). It provides us with telling information about how the actors see themselves, about the style of government, about their conceptions of citizenship and the construction of the state in the minds of the participants.

The ability to read and understand the way in which corruption and anti-corruption was handled therefore enables us to better understand the society and the political society under scrutiny. Firstly, because when relying on the analysis of anti-corruption talk, one might distil the norms which are conceived as important or which are “proposed” to be important by the political community. Denunciation of people or acts as being corrupt, considering the unambiguous negativity of the term, implies that there is a shared concept of what is legitimate and what is not.

Secondly, because corruption talk bears substantial political potential. The norm of ‘anti-corruption’ seems to be so strong, effective and dangerous for its targets that it could function as a hidden tool to be used at a suitable moment against a political opponent. This is why it is especially important to concentrate on periods of conflict or transition, where the occurrence of stronger waves of anti-corruption discourse might be expected. History serves as a convenient reservoir of study material on these cases. It seems to be worth evaluating to what extent the stronger anti-corruption discourses are aimed at an “objective” target (which bring us back to the problem of defining corruption) and to what extent the anti-corruption campaigns can be seen as selective, arbitrary and politicized (which raises questions like *cui bono* and about the recipients).

Legitimizing the new system

If we concentrate on the norms of discourse during a time of political change, the Dutch Republic at the turn of 1650/1651 might be an ideal example. After the end of the Eighty Years’ War, the country was divided by irreconcilable attitudes towards the peace agreed with Spain in 1648, the struggles over the international role of the Republic, the reinvention of the configuration of the union in this novel situation of peace, and, as an embodiment of the aforementioned matters, over the reduction of the army. The confrontation culminated in the attempted coup d’état of the Stadtholder, William II, in the summer of 1650. After his unexpected death in November 1650, the political representation faced the challenge of redefining the political system under the new circumstances. The decision of the provinces not to appoint a new Stadtholder is (given the decisive role of the Stadtholders of the House of Orange in the political system of the Republic not only internally, but also with respect to their representation towards the international public) to be seen as crucial, but was also followed by other system changes resulting from the redistribution of the Stadtholder’s former competences. These competences included mediating between the provinces in case of conflict, responsibility for the military command and the appointment of magistrates. The

recurring and explosive question of the most desirable religious arrangement also came back to the negotiation table.

In general, the events of 1650–1651 are seen as a period of crucial systemic change in the Dutch Republic (Frijhoff, Spies 1999, p. 76). As such, they might be counted among the “ruptures”, the importance of which has recently been reinvented through historical memory studies. In this regard, the rupture itself is not important, but the experience of it and its impact on people’s way of thinking (Deseure, Pollmann 2013). On the basis of these methodological assumptions, the period known as “True Freedom” (1650–1672) has also received renewed scholarly attention. Scholars have focused on the legitimization and argumentation strategies used to underpin the new regime (Stern 2010), among others the operationalization of history through the interpretation of the Dutch Revolt and its political instrumentalization (Steen 2013). This article aims to broaden this perspective through assessing the role of the anti-corruption discourse during this period of substantial change in the political system. While most attention is normally paid to the period around and after 1654 (the time where the new regime was forced to legitimize itself explicitly through the Act of Seclusion and where explicit legitimization was sought on paper by the quills of Johan de Witt and Pieter de la Court; Secretan 2010), this article deliberately focuses on the very initial period of “True Freedom”, the gathering time of the Great Assembly (January – August 1651).

This political body, initiated by the province of Holland and seated in the symbolically charged Hall of Knights (Ridderzaal) of the Binnenhof, is to be seen as the platform for the official approval of the changes after November 1650. Even through its constitutional composition (unlike the usual States General, the Great Assembly was not legally seen as a representative body but a full meeting of the provinces) it has the authority to take measures with far-reaching constitutional significance. The symbolic power of its steps appears all the more important considering the fact that the actual political matters had already been decided before the Great Assembly gathered. This seems to be one more reason to read the proceedings of the assembly as a programmatic, declaratory text and a kind of self-description of the nascent regime.

The anti-corruption discourse, as is to be argued here, played a significant role not only in the process of constructing the new system, but also in the way of coming to terms with the past (i.e. the illegitimate actions of William II, and, figuratively, the excessive power of the Stadtholder in general), which was also crucial to the self-image of the newly established system.

During the period examined, various proposals and resolutions were passed aimed at eliminating corruption (Aitzema 1669, p. 544). There was the famous ban on accepting gifts at meetings with foreign diplomats or even during diplomatic missions abroad (which infringed on the internationally accepted diplomatic culture in some respects and alienated the Republic further from its monarchical counterparts) (Heringa 1961, p. 101; Sanders 2013, p. 87), with a significant effort also being made in the field of domestic policy. The suggested measures for preventing corruption in the state

apparatus included a sworn oath for appointed officials in which they would declare not to have used any illegal instruments to obtain the position, such as gifts, money or an obligation to any service at a later time. Under the oath they were also obliged to report cases in which they were later offered money and were subject to a system of financial penalties in case of non-observance. Their families and other close acquaintances were also subject to the rules (Propositie 1651).

The anti-corruption debate was by no means conducted in secret. On the contrary, as was common in the Republic with its high degree of political participation (by Deen et al., 2011, public opinion was even considered part of the political system) and a high degree of leakage of political issues to the public (Bruin 1991), the questions under consideration were the subject of an active public debate, which unfolded partially through the medium of pamphlets. The aforementioned proposals against corruption stem from one of these pamphlets. However, as was the case with a lot of texts which made leeway in pamphlet form, the text originated from an official political body. In this case it was based on a speech by Adriaen Veth, the secretary of the province Zeeland, which was subsequently published.

This speech is a unique source to be consulted not only because it came to publication, but also because it might be considered programmatic for the new system (Japikse 1907). The absence of corruption, as Veth argued, was an essential prerequisite for the survival of every state. Corruption itself, on the contrary, was to be seen as the cause of the decline or the fall of states, as he demonstrated on the basis of historical examples, in particular that of the ancient Roman Empire (Propositie 1651). The narrative on corruption causing the decline of a state was therefore not only a later interpretative tool, but already an influential contemporary discussion, addressing both corruption and the desired state constitution. As Veth tried to further argue, it was first and foremost republics that were endangered by corruption. While a monarchy might be resistant to a degree to corrupt practices, for a republic it bore a fatal systemic danger. Here, an essential part of Dutch republican theory is addressed – the moral profile of its representatives (cf. Weststeijn 2012). The republican state system stands and falls – in the eyes of Veth and his contemporaries – with the administration of the offices by the most virtuous of people („ryckste, verstandighste en eerlyckste“).

The procedure which under normal circumstances guaranteed the right distribution of the appropriate people to the appropriate positions, and to which Veth turned to, was the ancient idea of “*Iustitia distributiva*” (Propositie 1651). Some people are, based on their virtues, predetermined to execute political functions (which, in a republic, are not seen as property of the holder but as an entrusted public office). If corruption causes people to be appointed on other grounds (such as bribery or nepotism), this mechanism of personal-place matching is disturbed, which brings about a deterioration in the political system as a whole (Propositie 1651). What Veth presents here is a point of view representative of early modern thought i.e. that corruption in a broad sense is understood as a deviation from the ideal that is still conceived as possible.

Veth's attitude differs from the perspective often used today, which concentrates on the problem of how individual anti-corruption measures, policies or systems will impact on the corruptibility of the officials. The early modern perspective has a reverse view of the cause and consequence, and perceives the political system as grounded in the character of its actors.

The anti-corruption norm might therefore be seen as an important self-descriptor of the new established system after 1650/1651 which has been "chosen" (without insinuating that such a firm political program was intentionally constructed) to establish a – regarding the cleavages built in the preceding years – fragile consensus between the provinces as well as throughout the society divided by the struggles between the States party and the Orangists. The norm of anti-corruption played here a very convenient role because corruption bore an indisputably negative charge. As a result, the anti-corruption rhetoric offered the opportunity to promote an uncontested image of an enemy, through the criticism of which it was possible to legitimize itself and promote consensus building.

Coming to terms with the past

One of the foundations crucial to the continued existence of each new system is the delineation of its relations to the previous one. On the one hand, there must be a demarcation that is visible enough to demonstrate the difference towards the public, whilst on the other hand, a certain degree of continuity should be guaranteed, in order to prevent new conflicts. The changes of 1650 are characterized by their consensuality. Although the actions of William II were classified as illegitimate, there was very little prosecution of his collaborators who were still alive (cf. Poelhekke 1973). On the contrary, there is evidence that there was a high degree of personal continuity in the governmental bodies (Registers 1646–1651). This is clear in the biographies of some of those individuals who unambiguously qualify as close partisans of William II before 1650. One such example was the leader of the Guelders deputation in the States General, Johan van Gent, who hardly appeared to encounter any serious impediments.

Symbolically, at the end of the Great Assembly, a general amnesty was passed. Its text was unequivocally aimed at consensus building. The authorized commission which prepared the text chose a mild wording: there were some "disagreements" which "got out of hand" through problematic resolutions carried by the General Estates on the 5th – 6th June (which built the legal basis for the controversial deputy lead by Willem II to the cities of Holland), but in the meantime, "through the help of God", harmony, concord and confidence were re-established and the provinces were able to round off their deliberations [at the Great Assembly] to everyone's general satisfaction (Afschrift 22.7.1651)

The interpretation of the past was in these words directly linked to the competence the Great Assembly demonstrated, which had to be underpinned. In respect to the past, the drive for consensuality went so far, that the text speaks about the determination of the

participating provinces not to even think back to the incidents of 1650 and to “eradicate” these disagreements from their memories forever; to forget everything as if it had never happened (Afschrift 22.7.1651). With regards to the efforts on consensus building and the rhetoric used to promote the concord between the provinces, which had to be worded very carefully because of the lingering divisions originating from the conflicts of the past, the general amnesty represents a certain counterweight to the speech by the Grand Pensionary, Jacob Cats, given at the opening session of the Great Assembly. In addition, the amnesty constitutes the foundations and symbolic basis for the legitimization of the new system.

Even though a new general attitude was agreed, which was aimed at creating a consensus, it does not mean that there were not examples which might have been used for the demarcation of the new system from the old one. One of them – that of the former griffier (chief clerk) of the States General, Cornelis Musch – seems to be especially interesting with respect to the handling of corruption. Musch, who had carried out the function from 1628, was famous for his corruptibility. As griffier, he ran the office of the States General, was responsible for their proceedings, was endowed with a broad array of contacts behind the scenes and was also regarded as a collaborator of the Stadtholder. From this position he was able to influence the negotiation agenda or be appointed to new functions when they were distributed. For his services he did not hesitate to ask for large amounts of money or directly blackmail the supplicants, with records also showing that he used sexual relations as a bargaining tool. He was regarded as one of the contact points to which to bring a claim to if a supplicant wanted to achieve his or her goal (Knevel 2001, p. 122ff). The States General were also aware of his corruptibility and reprimanded him a couple of times through new official instructions (Registers 10.8.1646, 28.8.1646, 10.1.1647).

During the negotiations of the Great Assembly, Musch was no longer alive. He died about one month after William II, supposedly by his own hand. His death gave way to a new influx of dealings involving this controversial person. The States General sent a clerk to Musch’s house in order to pick up state papers which Musch had potentially held at his home. Even though it had been explicitly forbidden for Musch to do so, the clerk returned, presenting a whole “bag” of such documents to the States General (Registers, 12.1.1651). The pamphlet market also reacted intensely to the death of Musch (Knevel 2001). A third platform where the corruption of Musch was discussed was at judicial authority level. In a process opened not long after the dissolution of the Great Assembly, a large part of Musch’s network was uncovered, the practices being openly disguised and opened to discussion (Japikse 1907). Even if the process took place after the closing of the Great Assembly, its role as the symbolic coming to terms with what was now seen as the “old regime” and, through this, the legitimization of the new one, cannot be underestimated (Knevel p. 147). The combination of these revelations helped to bring the old regime, with which Musch was associated and may have been viewed as symbolic of, into disrepute. Again the norm of anti-corruption, related not only to bribery, but also to the abuse of an entrusted public office (which was felt very

intensely in the Dutch Republic with respect to the monarchical history of the legitimization of the Dutch Revolt) took on a prominent role.

Conclusion

The anti-corruption discourse turned out to be an important tool for legitimizing the new regime of the Dutch Republic after 1650. Through its integration in the republican rhetoric it underpinned, first of all, the ideological self-definition of the “True Freedom”. A declaratory adherence to republicanism can already be traced back to the Great Assembly at which the foundations of arguments were laid for legitimizing the regime, which were to become even more explicit in the years to come (as demonstrated by the example of the Veth-speech). Of course there are many reservations to make – e.g. the outspoken anti-Orangism as well as the attack on the hereditary principle were, regarding the still tense situation resulting from the conflicts of the past years, practically non-existent. However, the ideal of the personal-office matching mechanism, which was assumed to have fatal consequences for the existence of a republic, was already present. We only come across corruption as the impeding factor instead of the later hereditary principle.

Secondly, the anti-corruption discourse also helped to determine a demarcation line for the regime of the past. Through this, it was possible to link the Stadtholder regime with a systemic and endemic degree of corruption. The figure of Cornelis Musch – no matter how intentionally on the part of the representatives of the new system – provided the new regime with an ideal opportunity to present a tangible example of the corruptibility ascribed to the old regime and to publicly reprehend it, without the necessity to elicit a new conflict through the penalization of the participants who were still alive. If the transition had not been consensual, this „corruption“ strategy may never have come into existence because the issue may never have arisen and been given the important role it was eventually to play.

In both respects, corruption seemed to represent an ideal enemy. Unchallenged, negatively connoted, it was not supposed to provoke opposition and was, at the same time, able to produce a high level of required legitimization.

Neither of the ways discussed with regards to the handling of corruption makes any assertion in terms of “real” corruption. On the contrary, the assertions that for example, corruption after 1650 even increased because the competences of the Stadtholder were spread among a larger and less transparent circle of people, or that the regime of “True Freedom” represented the most transparent period in comparison to the time after it came to an end in 1672 (when the new Stadtholder, William III, appointed a range of corrupt collaborators or those suspected of corruption) (Israel 2012, p. 773, 912), are as untouched as before. In this respect, the inquiry into historical corruption as such, as well as its concrete manifestations, remains a topic that stands on its own and which is open to specialized research. What this article has attempted to do is to make the research community see more sense in the importance of dealing with the norms of political communities, especially in times of political change, and of the role of the anti-

corruption norm (given all reservations made to its content and the unaltered need to define it before it is used) in political discourse. There are not only historical examples which teach us to see anti-corruption discourse not only as a neutral descriptive denomination, but also an influential strategy to deliver legitimization and, above all, delegitimization.

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Typology of EU Countries from the Viewpoint of the Minimum Wage and Selected Characteristics

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Abstract

The minimum wage in EU countries is applied either by law or through agreement between social partners. The aim of this paper is to create a typology of EU countries with respect to the amount of the statutory minimum wage and selected characteristics (economic level, educational level of the population and rate of unemployment). The analysis draws on official statistical data which have been processed using statistical methods. After the evaluation of the values of the calculated coefficients of correlation, only two characteristics were included in the cluster analysis (economic level and educational level). The reason for this, is that it was shown that the amount of the minimum wage and the rate of unemployment were independent variables.

On the basis of the results of the cluster analysis, seven clusters were identified. From the description and analysis of the individual clusters it was not possible to draw any definitive conclusion on whether a particular level of minimum wage is bound to a certain educational level. Even the statement that higher statutory minimum wages are found in countries with higher economic level can only be made with considerable caution. It was also evident that “old” EU countries showed much greater homogeneity in these characteristics than was found in the “new” ones.

Keywords: EU, GDP, minimum wage, cluster analysis

Introduction

Today, in many countries (not just in the EU) a minimum wage is now a commonplace part of the legislative framework. Nevertheless, discussions still continue as to its significance, impact and its actual economic and social functions. Advocates of a minimum wage regularly point out that it can motivate employees to accept and carry out work (even when low-paid) and provides employers with uniform conditions in terms of wage competition. Detractors, meanwhile, point to the possibility that minimum wages restrict employment opportunities for these self-same low-paid and

generally poorly qualified workers: for employers the minimum wage represents the very lowest threshold for wage costs which cannot be undercut.

Broadly speaking, it can be said that in countries where a statutory minimum wage has been introduced, various institutional and methodological mechanisms have been used to implement it. As a rule, one of the following approaches has been adopted:

1) the minimum wage is set by law, i.e. under a generally binding regulation with the legal force of an Act, i.e. by the State (it is for this reason that is generally referred to as the “statutory minimum wage”); or

2) it is set under binding collective agreements which stipulate the minimum wage or its various levels (divided by industry, sector, qualifications or professional groups), i.e. through agreement between various social partners (see e.g. Baštýř 2007, pp. 6-7).

Member states of the European Union apply both types of mechanism, although the commonest approach is for the minimum wage to be set by the State under law. EU member states see the advantages of doing so in the following facts:

It is a system founded on unified, statutorily regulated rules which define the scope and conditions for applying the minimum wage (the principle being that the scope for applying a minimum wage is as broad as possible); its basic rate and the conditions under which it is applied; the unified conditions under which a reduced minimum wage can be applied; and the ability to define the method and conditions under which the minimum wage can be increased (valorised).

The system establishes relatively favourable conditions for realizing the protective function of a minimum wage, both for employers and employees. The use of such a system is possible and suitable in countries where collective negotiations on wages rarely occur above the individual company level.

The system makes it possible to simply (and clearly) maintain a proportionate relationship to movements in the level of consumer prices and to changes in nominal and real wages.

Within the European Union, this system (with certain differences) is applied in the following states: Belgium, France, Croatia, Ireland, Luxembourg, the Netherlands, Portugal, Greece, Spain, United Kingdom, Czech Republic, Estonia, Hungary, Malta, Lithuania, Latvia, Poland, Slovakia, Slovenia, Bulgaria, Romania and also for the first time (from 2015) Germany. Pavelka (2014, pp. 88-90) provides an excellent overview of the developments in the application of the minimum wage in these countries and a description of the specifics of the individual systems, including the areas of application of the minimum wage, valorisation methods, etc.

The basic precondition for setting a minimum wage through collective bargaining is the attainment of highly developed collective bargaining between the social partners (in particular across an industry, i.e. above individual company level). This requires the existence of functioning ties between employers and employees that bring together a sufficient proportion of businesses and employees in order that they can negotiate, as

respective representatives, cross-company collective agreements. The provisions of such agreements, entered into across an industry or sector, then help lay the foundations for minimum wages in that country. In countries where the setting of a minimum wage under such collective agreements has been adopted, the number of employees covered varies. In general, the proportion of employees covered is lower than when the minimum wage is set by the State. Nonetheless, for those employees to whom no collective agreement applies (who have very little or no trade union representation), state regulation is provided through more selective legal regulations (relating only to particular groups of workers) or through the extension of valid collective agreements to cover such men and women. The minimum wage is set by collective agreements in the following EU countries: Denmark, Finland, Sweden, Italy, Austria and Cyprus.

Statement of a problem

There is a great quantity of publications and individual papers, of varying quality, which deal with the minimum wage and its manifold connections within an economy. In fact, the minimum wage has attracted the attention of economists (but also politicians, trade unionists and others) since the 1910s and 20s, when the first studies on the impact of a minimum wage were published in the USA (see e.g. Ashenfelter, Card 1999).

Authors have overwhelmingly preoccupied themselves with the impact of the introduction of, and the subsequent raising of, a minimum wage and its connection to unemployment. It is remarkable, but perhaps symptomatic of economic theory, that two contrasting schools of opinion have formed with regards to the appraisal of the effects of the minimum wage on employment. The first group (Card, Krueger 1995, and many others), believe that a minimum wage may have a positive, or at worst non-negative, impact on employment. The second group (Neumark, Wascher 2000; Neumark, Wascher 2007; Aaronson, French 2007) are fundamentally more sceptical, and their conclusions incline more towards mainstream economic theory, i.e. that the introduction of (or increase in) a minimum wage has a very direct effect, namely a reduction in employment. Neither of these two schools have been able to provide the overwhelming evidence or conclusive arguments that are needed to overturn the beliefs of the opposing side. As a result, the two currents of thought have now coexisted for several decades¹.

One of the most recent publications worth citing which deals with the relationship between the level of the minimum wage and employment is that by Pícl et al. (2014). The authors investigated the effect of the minimum wage on employment in the Czech Republic. They concluded that no such effect could be confirmed. A similar conclusion was also reached by Schmitt (2015) for the situation in the USA. In the context of EU states, Pavelka (2014) investigated the dependence between general and youth

¹ The discussions in the 1990s were particularly heated with regards to the conclusions of the empirical studies carried out by Card and Krueger with Neumark and Washer in *The American Economic Review* or between Card, Katz and Krueger with Neumark and Washer in the *Industrial and Labor Relations Review*.

unemployment levels and the proportion of the minimum wage to median wages. His analysis drove him to conclude that the dependence was positive, but that the effect was only very slight. In fact, for those persons with the very lowest level of education, no dependence was demonstrated between unemployment levels and the proportion of the minimum wage to median wages. Conversely, after examining data from Cyprus, Mitsis (2015) drew attention to the negative relationship between minimum wage levels and employment, recognizing simultaneously a significant displacement of employment towards those sectors that had not been covered by the minimum wage.

Other areas that have attracted the attention of authors have included the effect of a minimum wage on income (in)equality and also wage distribution (Bosch 2015). An interesting opinion was reached by Garnero et al. (2015), who used data from 18 European states (2007 – 2009) to investigate how the diversity of systems for generating a minimum wage influences unequal earnings. The results of the research confirmed, what had hitherto been assumed by many economists, that a combination of a sectoral minimum wage with a high coverage of collective bargaining is entirely equivalent to a legislated statutory minimum wage. Campolieti (2015), examines the impact of a minimum wage on the wage distribution of the adult labour force (aged 15 – 64 years) in Canada in the years 1997 – 2010. He concludes that the impacts are not as significant as those in the United States.

Now and again papers also appear that evaluate minimum wages in relation to enterprises (generally those enterprises in which minimum wages are paid – fast food restaurants, hotels, minor services). However, these tend not to be scientific papers, but rather compilations of more or less scholarly articles in newspapers, for example.

It is probable that the relationship between the minimum wage, economic level and education (see the subject of analysis in this text) has not so far been separately described by any of the aforementioned authors. The only relationships that has been examined is between education and wage distribution (or wages), whereby the minimum wage is just one of the factors that affects the latter (under Czech conditions see Bílková 2013; Devereux, Fan 2011; Brunello 2010).

Materials and Methods

The subject of this analysis is the relationship between the level of the statutory minimum wage in EU member states (provided such measure has been introduced) and certain selected characteristics. The aim of the analysis is to establish a typology of EU countries with regards to the amount of minimum wage and the selected characteristics.

Three characteristics were chosen: the economic level of the country as expressed by the indicator GDP per capita in PPS (whereby the EU28 is 100%), the proportion of people with a tertiary education in the population aged 25 – 74 years and the harmonized level of unemployment. The first two characteristics were selected on the basis of the findings of various authors (Ashenfelter, Card 1999; Bílková 2013; Dinis da

Costa et al. 2014), according to whom these factors contribute to the shaping of the wage level, of which the statutory minimum wage is a part.

A condition for highly paid, complex and innovative work is highly qualified, educated labour - the interconnection between education, wage distribution and the wage level is relatively tight. At the same time, education is often seen as a source of prosperity and a high economic level (Bílková 2013) or productivity (Chevalier et al. 2004). Countries producing output with high added value must have a highly educated population who consequently demand higher wages for their work. In other words, higher wage levels (including the minimum wage) can be expected in countries with a highly educated population.

The possible link between the rate of unemployment and the minimum wage has been pointed out by numerous authors (as discussed above), even though they do not completely agree on the extent of this effect.

There is no doubt that the wage level and the minimum wage level in a given country will also be related to other characteristics (e.g. social benefits system, establishment of a subsistence minimum and a living wage – and many others). Nevertheless, for the purposes of a cluster analysis, it is necessary to select only a limited number of indicators in the knowledge that the results will be affected by this selection.

The underlying assumptions for the cluster analysis are as follows:

- 1) The minimum wage level in countries is tied to a specific economic level (the higher a country's economic level the higher its minimum wage), to the level of unemployment (the higher the minimum wage level the higher the level of unemployment), and to education levels (the greater the proportion of people with a tertiary education, the higher the minimum wage).
- 2) In countries where the statutory minimum wage is higher, the expectation is that the economic level is higher and that there is a more educated workforce, but also greater levels of unemployment.
- 3) In general, the statutory minimum wage reflects (more or less) the overall wage level, which in turn influences the economic level and education (we assume that in countries with a more educated population there are also generally higher wages). In line with mainstream economics², the assumption is that unemployment is higher in countries with a higher minimum wage.

Prior to the cluster analysis, it is necessary to calculate the correlation coefficients in order to determine whether, or not, all three characteristics can be included in the cluster analysis. If any of the characteristics do not demonstrate at least a medium-strength dependency on the amount of the minimum wage it cannot be included in the cluster analysis. In order to confirm that the correlation coefficient calculations were not affected by external variations (especially in the case of unemployment and GDP per

² The author is not a supporter of this point of view.

capita), the correlation coefficients were calculated for the years 2011 – 2014 (with exception to the coefficient for the correlation between the minimum wage and the proportion of people with a tertiary education: data on the educational structure in 2013 are from a select survey; however, the assumption has been made that the educational structure is not subject to much interannual variation). The actual cluster analysis was carried out for 2013 because it was the last year for which all such data were fully available.

With respect to the character of the analysis, only secondary data from official statistics were used as source data. Conducting an independent questionnaire survey would have been impossible. The source data were taken from the Czech Statistical Office (international comparison). Data on those countries without a statutory minimum wage (i.e. Denmark, Finland, Sweden, Italy, Austria and Cyprus) and Germany, which although it does have a minimum wage today (2015), did not have one in 2013, previously applying a system of collective bargaining instead, were deliberately discarded from the analysis.

This secondary data was processed using methods of descriptive statistics, statistical correlation and cluster analysis.

Table 1: Underlying statistics in selected EU member states in 2013

Country	Minimum wage (EUR per month) ¹	GDP per capita in PPS (%, EU28=100)	Rate of unemployment ² (%)	Prop. of population with a tertiary education ³ (%)
BE: Belgium	1,501	118.7	8.4	33.1
BG: Bulgaria	158	46.5	13.0	24.2
CZ: Czech Rep.	318	79.9	7.0	19.1
EE: Estonia	320	73.0	8.6	37.2
EL: Greece	876	76.4	27.5	24.8
ES: Spain	748	95.2	26.1	31.0
FR: France	1,398	108.2	10.3	29.8
HR: Croatia	373	60.8	17.3	19.1
HU: Hungary	335	66.8	10.2	21.5
IE: Ireland	1,461	126.3	13.1	38.7
LV: Latvia	286	67.3	11.9	29.3
LT: Lithuania	289	74.2	11.8	32.8
LU: Luxembourg	1,874	264.1	5.9	38.4
MT: Malta	697	88.2	6.4	17.2
NL: Netherlands	1,469	126.8	6.7	31.7
PL: Poland	392	68.0	10.3	24.2

PT: Portugal	565	75.5	16.4	17.5
RO: Romania	157	54.1	7.1	14.5
SI: Slovenia	783	82.7	10.1	26.4
SK: Slovakia	337	76.3	14.2	18.8
UK: United Kingdom	1,249	105.7	7.6	38.2

¹ Non-euro area countries: exchange rates and conversion into EUR: see Eurostat Metadata;

² From selected labour force surveys;

³ Proportion in the population aged 25 –74 years, selected survey.
Source: Czech Statistical Office, Eurostat (Eurostat Metadata)

Results

Correlation between the level of the minimum wage and the selected characteristics

The strength of the dependency between the amount of the minimum wage and the selected characteristics was measured using the correlation coefficient r_{xy} . The results are presented in Table 2.

Table 2: Correlation coefficient values between the amount of the minimum wage (MW) and the selected characteristics

	2011	2012	2013	2014
MW/GDP per capita in PPS	0.84721943	0.83733720	0.82882930	0.84743664
MW/rate of unemployment	-0.32259086	-0.21516527	-0.15955132	-0.15997547
MW/prop. of population with a tertiary educ.	¹	¹	0.63421037	¹

¹ Data not available

Source: own calculation based on data from Czech Statistical Office

On the basis of the results presented above it is possible to state that for all four years a strong direct linear dependence exists between the amount of the minimum wage and the economic level (expressed as GDP per capita in PPS), and that a moderate direct linear dependence exists between the amount of the minimum wage and the proportion of the population with a tertiary education (although the dependence is lower than expected). In contrast, the results show that the amount of the minimum wage and the unemployment rate are only slightly dependent; for 2013 – 2014 it could even be said that they were independent (the value of the correlation coefficients for all four years is low – close to zero). This last result confirms the views of those who do not consider the

minimum wage to be a cause of unemployment or do not see a relationship between the minimum wage and (un)employment (Pícl et al. 2014; Schmitt 2015).

Cluster analysis

Only those variable which demonstrate a medium-strength dependence can be included in the cluster analysis. As a result, only the following variables can be utilized: minimum wage level, GDP per capita and the proportion of people with a tertiary education. For these variables the descriptive statistical results are presented in Table 3.

Table 3: Results of descriptive statistics

Descriptive statistics	Min. wage	GDP per capita	Tertiary educ.
Mean	742.1905	92.1286	27.0238
Minimum	157	45.5	14.5
Maximum	1,874	264.1	38.7
Median	565	76.4	26.4
Standard deviation	533.1992	45.3692	7.7592
Variance	284,301.4	2,058.4	60.2

Source: own calculation based on data presented in Table 1

Since the data are measured in a variety of units (EUR, %) and show markedly different levels and variability, they must be normalized in order to carry out the cluster analysis. Failure to normalize the data would result in the cluster analysis practically being determined by the first variable which would differ markedly from any result where all three variables would have an equal impact on the cluster result. The normalized values are presented in Table 4.

Table 4: Normalized data for cluster analysis

Country	Min. wage	GDP per capita	Tertiary educ.
BE: Belgium	1.423126	0.585671	0.78309
BG: Bulgaria	-1.09563	-1.00572	-0.36393
CZ: Czech Republic	-0.79556	-0.26953	-1.02121
EE: Estonia	-0.79181	-0.42162	1.311492
EL: Greece	0.250956	-0.34668	-0.2866
ES: Spain	0.010896	0.067698	0.512445
FR: France	1.229952	0.354236	0.357791
HR: Croatia	-0.69241	-0.69052	-1.02121
HU: Hungary	-0.76367	-0.55828	-0.7119
IE: Ireland	1.348107	0.753185	1.50481
LV: Latvia	-0.85557	-0.54726	0.293352
LT: Lithuania	-0.84995	-0.39517	0.744427
LU: Luxembourg	2.122677	3.790485	1.466146
MT: Malta	-0.08475	-0.08659	-1.26608
NL: Netherlands	1.363111	0.764206	0.60266
PL: Poland	-0.65677	-0.53183	-0.36393

PT: Portugal	-0.33232	-0.36652	-1.22741
RO: Romania	-1.09751	-0.8382	-1.61405
SI: Slovenia	0.076537	-0.20782	-0.0804
SK: Slovakia	-0.75992	-0.34888	-1.05987
UK: United Kingdom	0.950507	0.299133	1.440371

Source: own calculation based on data presented in Table 1

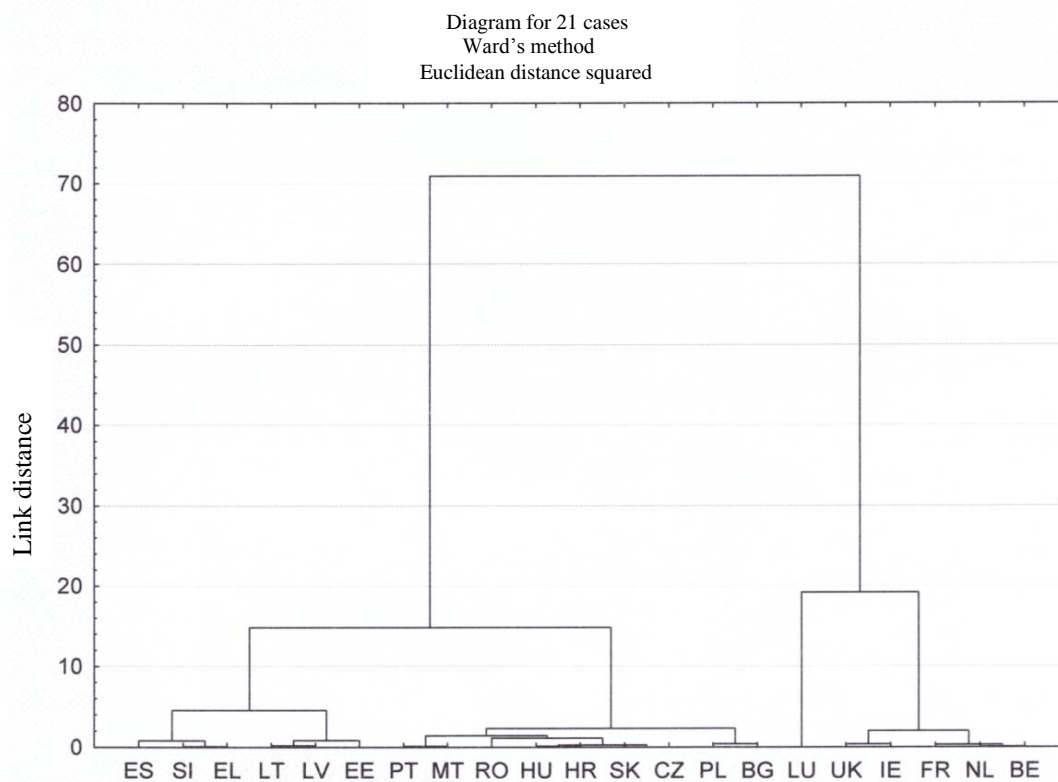
The squared Euclidian distance was chosen as the distance metric. The clusters were assembled using Ward's method. The results of the cluster analysis are illustrated in Figure 1.

On the basis of the results of the cluster analysis, seven clusters were created:

Cluster designation	No. of states	Cluster features
S1	3	Spain, Slovenia, Greece
S2	3	Lithuania, Latvia, Estonia
S3	2	Portugal, Malta
S4	5	Romania, Hungary, Croatia, Slovakia, Czech Republic
S5	2	Poland, Bulgaria
S6	1	Luxembourg
S7	5	United Kingdom, Ireland, France, the Netherlands, Belgium

To complete the picture, it is necessary to re-emphasize that a completely separate group of countries exists, formed by those states who do not have a statutory minimum wage, which were discarded from the cluster analysis (Denmark, Finland, Sweden, Italy, Austria, Cyprus and, because the year in question was 2013, also Germany).

Figure 1: Dendrogram of the clustering procedure



Source: author – processed on the basis of data presented in Table 4

Discussion

With respect to similarity, the most similar are Slovenia and Greece, followed by Lithuania and Latvia, as well as Portugal and Malta. These pairings also constitute the most homogenous clusters (that is if we ignore the cluster which constitutes only one country - Luxembourg), whereas the most heterogeneous is the very last group comprising the United Kingdom, Ireland, France, the Netherlands and Belgium.

The countries in the first cluster (Spain, Slovenia and Greece), may be cautiously characterized as “average”. Their minimum wage levels, economic level and the proportion of people with a tertiary education all show approximately average values.

The Baltic States (Lithuania, Latvia and Estonia) make up the second cluster: they are typified by minimum wage levels that are far below-average (less than half the average), slightly below-average economic level, but above-average levels of education.

Portugal and Malta (third cluster) are characterized by slightly below-average minimum wages levels and economic level, but also a considerably below-average proportion of people with a tertiary education (both countries report the lowest proportion of people with a tertiary education out of all the given states).

Typical for countries in the fourth cluster (Romania, Hungary, Croatia, Slovakia and the Czech Republic) is a minimum wage level that is significantly below-average, as well as below-average economic level and the proportion of people with a tertiary education.

The fifth cluster, consisting of Poland and Bulgaria, is an interesting combination of considerably below-average minimum wage levels, as well as below-average economic level, but with average levels of people with a tertiary education.

Luxembourg defies comparison and is therefore in a cluster of its own. It is a state with the highest level of minimum wage, the highest economic level and has one of the highest proportions of people with a tertiary education of any of the monitored countries.

The seventh cluster consists of the United Kingdom, Ireland, France, the Netherlands and Belgium. These are countries where the level of the minimum wage is much higher than average, with above-average economic level and well above-average educational attainment.

Conclusion

On the basis of the correlation and cluster analysis, the following conclusions can be drawn:

The calculated correlation coefficients show that the level of the minimum wage and the unemployment rate were only slightly dependent, or even independent, variables. The values of the correlation coefficients were close to zero (between -0.3 and -0.1). These results support the views of those who do not see the minimum wage as being a cause of unemployment (Pícl et al. 2014; Schmitt 2015), and that it simply adds another piece of evidence to the long (and certainly not finished) discussion on the impact of minimum wages on unemployment. Contrary to the assumption made, this indicator could not be included in the cluster analysis. As a result, it became clear before starting the cluster analysis, that our original assumption that the higher the minimum wage in a country the higher the level of unemployment, would definitely not be confirmed (or possibly overturned).

The correlation coefficient calculations for the remaining two assumptions confirmed that a direct linear dependence exists between the level of the minimum wage and the economic level, as well as between the level of the minimum wage and education. The linear dependence between the level of the minimum wage and the economic level was strong (the value of the correlation coefficient was over 0.8). Of particular interest is the fact that the dependence between the level of the minimum wage and a population's education level was 'only' moderately strong (the value of the correlation coefficient was slightly above 0.6). The expectation was that there would be a stronger dependency.

Only three variables were therefore included in the cluster analysis: the amount of the minimum wage, the economic level (expressed by the indicator GDP per capita in PPS) and the proportion of people with a tertiary education.

Seven clusters were identified on the basis of the results of the cluster analysis. One cluster featured only one element, the others contained between two and five elements (i.e. countries).

From the description and analysis of the individual clusters it was not possible to draw any definitive conclusions with regards to a specific minimum wage level being tied to a specific level of education. If the specific case of Luxembourg is ignored, there are states (e.g. the Baltic States – Lithuania, Latvia and Estonia) in which the level of the minimum wage is well below-average, despite the population being above-averagely educated. In contrast, there are other countries (e.g. Croatia, Slovakia, Czech Republic, Romania and Hungary) where a low minimum wage is accompanied by below-average levels of education. It can only be claimed for the states of 'old' Europe (bolstered by Slovenia) that an average or above-average minimum wage corresponds with an average or above-average proportion of the population having a tertiary education.

It is true, that when assessing the connection between the level of the minimum wage and the level of economic activity it can be concluded that there is a strong connection. (This was expected because the value of the correlation coefficient was greater than in the previous example). It can therefore be stated that in countries with a higher minimum wage we can expect a (more or less) higher economic level. However, for reasons previously given, this statement should be treated with caution.

It can be also noted that those countries that tend to be harmonised in other aspects (e.g. the Baltic States) (Minařík et al. 2013) usually fall together into clusters typified by the levels of the given characteristics.

In conclusion, it is not possible to definitively state that a particular amount of minimum wage is accompanied by a particular economic level and simultaneously a particular level of education within a society. Nonetheless, the 'old' countries of the EU tend to be more homogenous: the overall levels of minimum wages matches their respective economic level and, in general, they have a greater proportion of people with a tertiary education (although small dissimilarities exist between countries in Southern and Western Europe) (see also Pavelka 2014). In terms of minimum wage levels, 'new' Europe lags well behind. Nevertheless, this delay is not always accompanied by a similar shortfall in the levels of education or economic level. However, greater differences exist between these characteristics than exist in the original EU countries.

Even though the results of the analysis do not appear to be particularly conclusive (in fact they did not even confirm our original assumptions), they may present a certain alternative insight into the context of the minimum wage in the ongoing debate about the issues and perspectives of minimum wages in EU countries.

The minimum wage is still an inspiring topic. Further research could include additional factors for cluster analysis (e.g. long-term unemployment rates) or the processing of data using alternative statistical methods (e.g. ANOVA).

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Local Action Groups (LAG) as an important strategic partner for rural development in the Region of South Bohemia

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Abstract

This paper presents the opportunities for using local action groups (LAG) as an ideal platform for the initiation of the functional and long-term development of rural regions. Countryside areas in the Czech Republic are facing an exodus of young people and a decreasing level of education. These problems are compounded by the non-conceptual approach to implementing solutions to resolve rural development issues. These problems need to be dealt with at all levels i.e. national, regional and local. The existing measures, mainly legislative and legal support, do not correspond with the importance of the issues at hand. At present, any development plans that are put forward are placed before local governments for approval. The local governments cooperate with LAGs to select those proposals that are realistic and can be supported from limited budgets. Unfortunately, development objectives that have the potential to work in larger territories often face major barriers “from above and from below”.

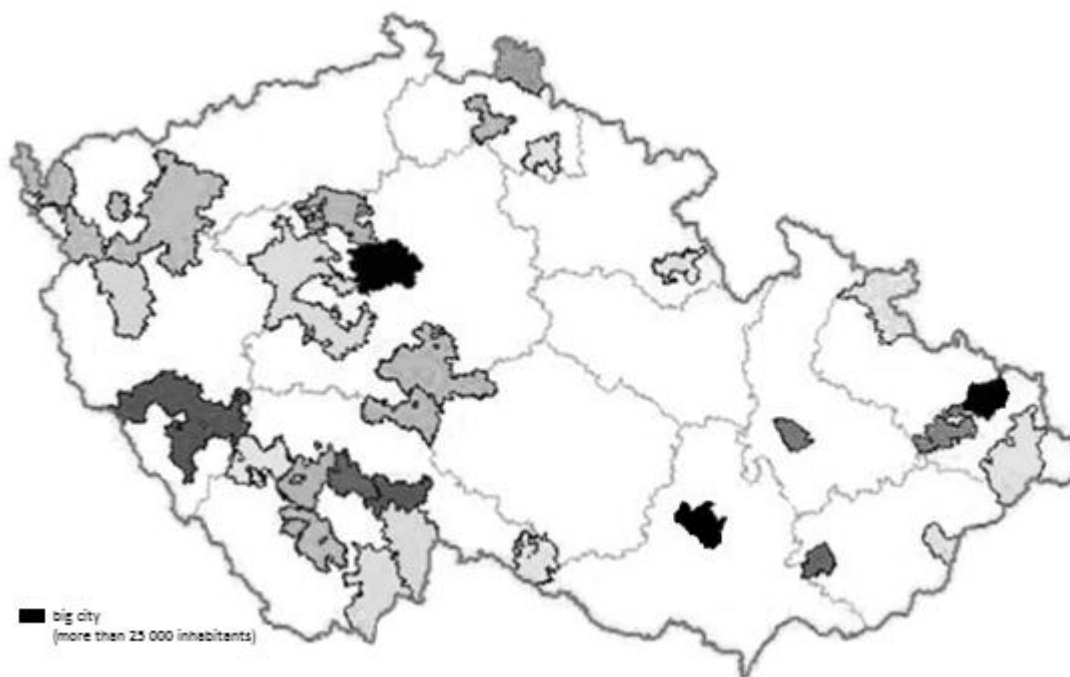
This paper identifies those factors that would make it feasible to use the management staff of local action groups as coordinators in the given region. With their detailed knowledge of the region they are able to assist in targeting various forms of financial support where they are most needed, as well as being able to initiate cooperation at different levels that would contribute to the actual and complex targeting of that support. The management staff of local action groups are also aware that rural development cannot only rely on a wave of subsidies. However, these resources can be used to build a strong partnership between the public, private and non-profit sectors. Prosperous rural regions are those regions in which local businesses function with the support of local governments and where the level of the local (and/or regional) education system is successfully maintained or improved and to which educated people return after their studies in larger towns. LAGs may substantially contribute to the solution of the aforementioned issues.

Keywords: local action group, LAG, rural regions, local governments, animator

Introduction

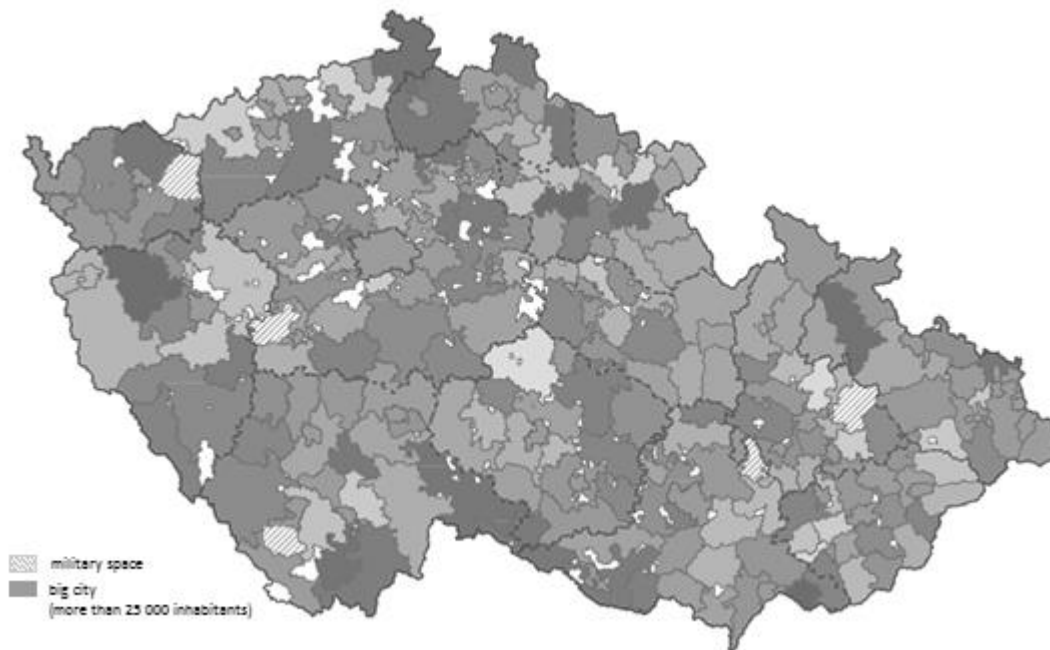
In the Czech Republic the number, role and activities of local action groups (LAG) grew substantially after 2003. They were established spontaneously and almost geometrically (see Figures 1 and 2). This expansion is evidence of the success of the idea that rural development should be influenced by those living there. The basis for this was a new method (place-based decision making) which facilitates cooperation between public administration, the business sector and non-profit organizations, whereby decisions on all crucial issues are taken on the basis of consensus across these different sectors (Wade, Rinne 2011, p. 2).

Figure 1: Map of regions in the Czech Republic with LAGs (2004)



Source: National Network of Local Action Groups in the Czech Republic

Figure 2: Map of regions in the Czech Republic with LAGs (2015)



Source: National Network of Local Action Groups in the Czech Republic

In the programming period 2007 – 2013, local action groups were supported by the Rural Development Programme administered by the Ministry of Agriculture of the Czech Republic. In 2008, the first 48 local action groups were selected within the framework of this programme which were subsequently permitted to allocate financial resources among applicants from their regions on the basis of the LEADER Strategic Plan (LSP). This was carried out by working groups (WG) whose task was to define the priorities in the given area and to implement a strategy for sustainable development across the area of interest of the respective LAG (Wokoun, Malinovský 2008, p. 358).

The allocation of resources was primarily based on the size of the population and the size of the LAG area. In 2009, another 32 local action groups were selected that satisfied the conditions for participating in the Rural Development Programme. This brought the number of supported LAGs in the Czech Republic to the agreed level. In 2010, a similar procedure was adopted when the Minister of Agriculture decided to increase the number of LAGs that could receive allocated resources within the framework of the Rural Development Programme to 112. As a result, another 32 LAGs were selected. This decision firmly anchored the LEADER principle into the Czech rural development planning environment and increased the involvement and interest of municipalities in LAG activities across the Czech Republic.

Material and Methods

The methodical approach was utilized to analyse a selected sample of LAGs, in particular with regards to their contribution to the development of the Czech countryside. This includes descriptions of the principles and rules underlying their activities.

A representative test sample for the aforementioned research was selected from the Region of South Bohemia. The region covers an area of 10,057 km² (12.8% of the total area of the Czech Republic) and is the second largest region, behind the Region of Central Bohemia. The region is characterized by a relatively low population density (62 people per km² against 102 people in the Region of Central Bohemia), lower average wages and lower GDP per capita. Geographical factors influenced its historical development, whereby the region remained less developed and poor. This is evident in the fact that there are no large mineral resources in South Bohemia, that the majority of the agricultural land consists of lower quality soils that are intensely farmed, and that industry is concentrated in just a few locations. The landscape has therefore remained almost unchanged over many decades. Commercial forestry takes up a substantial part of the landscape, as do the pond systems that were built hundreds of years ago. Both generate income for the surrounding areas. The landscape also lends itself well for relaxation and recreation, however to live and work there permanently is not an easy task when compared to the opportunities city life provides.

The degree to which the selected sample is representative can be supported by a theoretical consideration and/or assumption. This assumption is that the people living in such a region have always pursued various activities and been involved to varying extents in clubs and special interest groups, etc. in order to make their lives socially valuable. However, it should be noted that when taking this assumption into consideration, the same trends, although with varying degrees of intensity, can also be identified in the other regions of the Czech Republic. The specificity of the region is therefore better emphasized by the fact that the population of the whole region amounts to 637,000 people: of which 93,000 people live in the regional capital, České Budějovice, with the remaining 544,000 people living in the 622 towns and municipalities across the region (on average 875 people per municipality), of which approximately 134,000 inhabitants live in former district towns. If this latter number is also taken into consideration, the population density per rural settlement in the Region of South Bohemia is actually much lower. This is evident in the fact that the majority of human settlements in the region are small hamlets. For historical reasons, these hamlets have to cope with low level public utilities and services, and, as is the case in other rural areas, they also face the continuous exodus of young people to towns. They leave the countryside to study and to work in the towns, but alarmingly rarely return. The highest transfer of human resources continues to be recorded in the population with higher levels of education. This is a limiting factor for the development of the Region of South Bohemia as a whole.

Results and Discussion

The results of the performed analysis can be broken down into three main stages: establishment of LAGs; activities over the period 2007- 2013; activities over the current period 2014-2020.

Establishment of LAGs

Local action groups came into existence as an initiative whose objective was to assist in making permanent improvements to the countryside. It is important to note that LAGs have never claimed an exclusive role in regional development, but have only wanted to be actively involved in developmental trends and to influence them according to the wishes of the people living there. The LEADER (“Liaison Entre Actions de Développement de l’Économie Rurale” or “Links between the rural economy and development actions”) method, which brought LAGs into existence, allows local people to participate in the development of their region because they understand the territory better than anyone else. Since its introduction in 1991, its implementation across the European Union has proven so successful that it has continued to develop (Woods 2011, p. 145). The concept’s expansion in the Czech Republic started in 2004, with targeted support from national resources already beginning in 2006 under the Leader CR Programme. In total, the Regional Authority has supported local action groups to the tune of almost CZK 23 million. This represents 4.2% of the amount that LAGs brought back into the region through their activities. This support was used to pay expenses that could not be claimed within the framework of overhead costs, in particular interest on credit because LAGs are required to pre-finance their activities.

Activities over the period 2007-2013

For the period 2007-2013 the activities of LAGs were supported by the Rural Development Programme of the Ministry of Agriculture of the Czech Republic. Out of the 15 active local action groups in South Bohemia, 12 LAGs were supported by the Rural Development Programme over this period. The remaining three implemented at least cooperation projects (see Figure 3) and therefore acquired important know-how. These activities cost the Regional Authority of South Bohemia a total CZK 543.6 million. These costs represent the value of the subsidies extended to LAGs, and not the value of the total costs of the projects which is estimated to be more than twofold. Table 1 shows the contributions to the LAGs from the Regional Authority of South Bohemia over the reference period.

Figure 3: Leader strategic plan during the period 2008-2013

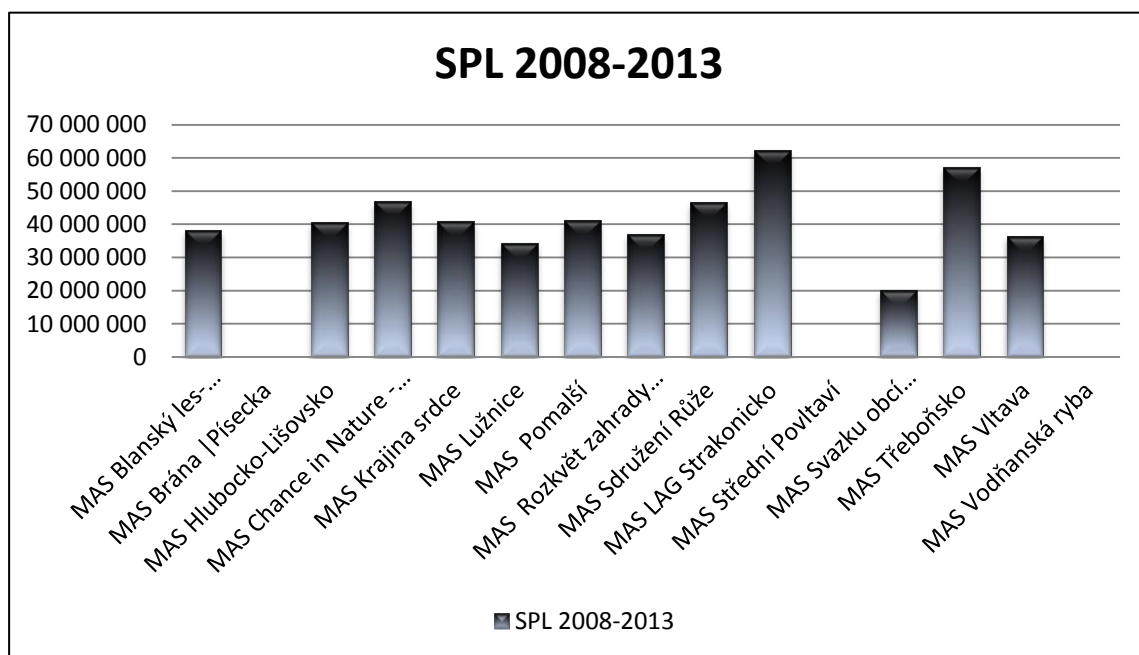
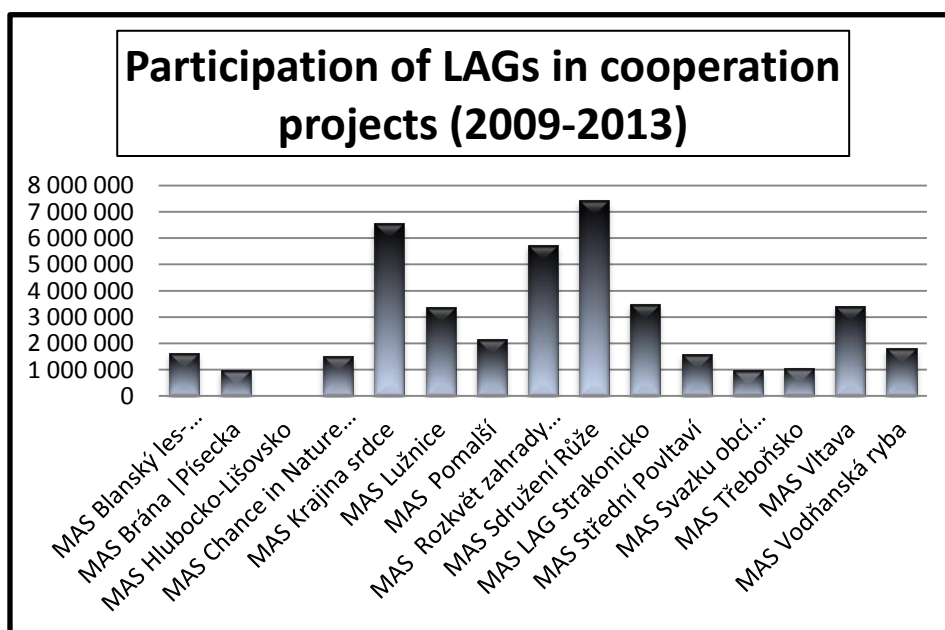


Table 1: Cooperation projects (CP) during the period 2009–2013

COOPERATION PROJECTS	5th round	7th round	8th round	10th round	13th round	15th round	17th round	19th round	CP 2009 - 2013 IN TOTAL
MAS Blanský les-Netolicko	0	0	412 180	0	0	1 215 000	0		1 627 180
MAS Brána Písecka	0	0	517 050	0	489 456	0	0		1 006 506
MAS Hlubocko-Lišovsko	0	0	0	0	0	0	0		0
MAS Chance in Nature - LAG	1 529 735	0	0	0	0	0	0		1 529 735
MAS Krajina srdce	782 946	133 000	0	1 485 469	1 031 454	1 350 000	1 783 021		6 565 890
MAS Lužnice	556 250	500 000	350 680	0	290 268	1 344 060	329 328		3 370 586
MAS Pomalší		0	529 380	0	1 350 000	285 660	0		2 165 040
MAS Rozkvět zahrady jižních Čech	4 271 644	0	0	0	0	1 447 200	0		5 718 844
MAS Sdružení Růže	706 116	1 831 757	2 490 260	0	675 000	1 293 210	424 170		7 420 513
MAS LAG Strakonicko	558 666	0	2 010 100	0	944 172	0	0		3 512 938
MAS Střední Povltaví	730 250	0	631 210	0	0	0	207 630		1 569 090
MAS Svazku obcí Blatenska		0	518 350	0	464 472	0	0		982 822
MAS Třeboňsko	0	0	1 056 000	0	0	0	0		1 056 000
MAS Vltava	588 000	1 082 500	421 630	0	337 775	964 890	0		3 394 795
MAS Vodňanská ryba	0	0	519 150	0	315 000	991 800	0		1 825 950
South Bohemian LAG in total	9 723 607	3 547 257	9 455 990	1 485 469	5 897 597	8 891 820	2 744 149		41 745 889

The allocations represent the third highest in comparison to the other regions of the Czech Republic. As the maximum level of expenditure by local action groups on a project was strictly limited, in the overwhelming majority of cases the funds therefore supported hundreds of individual projects and tens of cooperation projects (see Figure 4). It is important to note that the support was mainly targeted towards the development of agriculture and its diversification (Pártlová et al. 2009) and also towards the development of public utilities and services in smaller municipalities. The positive activities of LAGs often cemented and strengthened their positions in the conscience of local mayors. Mayors started to recognize them as being an important part of the subsidy system which could enable them to support small projects essential to their rural development plans. At the same time, they experienced maximum transparency and a basic immunity to various financial and corruption scandals that unfortunately accompanied other more important subsidy programmes.

Figure 4: Participation of LAGs in cooperation projects during the period 2009-2013



Activities over the current period 2014-2020

In contrast to the period 2007-2013, when LAGs were funded under the Rural Development Programme and expanded their activities, persistent uncertainty concerning operational programmes for 2017-2020 has meant that further progress of LAG activities has faltered. Since mid-2014, local action groups have had to pay their activities from resources they gained on their own. Unfortunately, they are, as in the past, restricted in their ability to attract new resources by pursuing alternative activities. The Ministry of Agriculture and the Ministry for Regional Development attempted to make up for this gap in the financing of LAGs through two isolated projects to which all local action groups had common access. Nevertheless, the majority of LAGs are now facing a very difficult financial situation. It is clear that the restrictions imposed on these

groups by the controlling authority were not chosen appropriately i.e. LAGs can only do what they are paid for and attempts to do something else make them ineligible for the relevant financial means.

At present, the main factor having a negative impact on rural spatial development is centrally defined methodical procedures and instructions with regards to all spheres of LAG activities. Similarly, there is a negative perception of the disproportional amount of paperwork relating to project administration and statistical reporting. In the sphere of rural development support, it is evident that nobody in the central institutions can identify all the regional disparities, individual needs of particular areas and of the people living and working in those areas. In order to do so, those institutions would need to have at their disposal a unique information network. A network that would work in a sufficiently small territory that would enable them to explore in detail how things work, to process that knowledge, and to define common issues and problems that differentiate one region from another. Until now, the ministries have typically chosen to follow a narrow policy of working with expert commissions that are composed of highly erudite specialists in the given fields. They therefore forego the opportunity to listen to other opinions that, maybe due to a broader approach offered than that of specialists, could bring greater innovation or synergies (Galvasová 2007, p. 14). It often happens that the particular activities of different bodies overlap to a larger or smaller extent, or that they even act antagonistically towards one another. To avoid this happening too frequently in practice, the aims in some spheres were adjusted in such a way that all people “could find what they need”. This resulted in the diffusion of the limited resources to isolated projects, leaving many interesting plans “on paper”.

These centrally taken measures have taken more of the already scarce resources away from those issues that need to be tackled the most urgently in a particular region. This not only applies to social policy and employment, but also to rural development. It is fair to say that in some cases the state administration has come to realize that individualization on the basis of qualitatively revealed needs is a good way of assisting particular regions. Worthy of note is a recent initiative by the Ministry of Education, Youth and Sport, which, within the framework of the Ministry’s patterns for drawing resources from the Operational Programme Science, Research and Education, will target funds (in particular regions) according to clearly identified needs arising from so called local action plans. These plans will be devised by representatives of schools, founders, as well as parents and representatives of non-profit organizations. In many places the realization of these plans will be covered by the local action groups themselves. This will also be the case in the Region of South Bohemian, with exception to one microregion. The coming months will show whether the competent apparatus of the Ministry will be able to actually apply this interesting idea in practice.

In the course of 2015, local action groups in the Czech Republic started to devise new strategies for community-led local development (SCLLD; previously LEADER strategic plans). During the preparations for the new programme period, other operational programmes were made accessible through the LEADER method. Whilst in the

preceding programme period 2007–2013 local action groups were an active element of the Rural Development Programme of the Ministry of Agriculture, in the current period their management faces quite a different challenge because resources will be allocated in the CR from four operational programmes. Local action groups will have access to operational programmes supported by the European Rural Development Fund (ERDF) and the European Social Fund (ESF). Besides the Rural Development Programme, the integrated CLLD tool will also be used by the Operational Programme for Employment, the Operational Programme for the Environment and the Integrated Regional Operational Programme. At least 5% of the resources in the European Agricultural Fund for Rural Development (EAFRD) will be allocated to the Rural Development Programme. Current indications are that 4.95% of the resources in the European Regional Development Fund (ERDF) will be targeted towards CLLD, as will 2.17% of the resources in the ESF.

Conclusion

The countryside represents 90% of the territory of the Czech Republic. It therefore deserves maximum attention, attention that has mainly focused on large towns until now. It is for this reason that all those that have a role in its development should be involved in a more intensive way. This applies in particular to the involvement of representatives from public administration, business and the non-profit sector, including local action groups. Until now, their role as coordinators has not been fully appreciated at all levels within the relevant controlling and administrative bodies. However, it is clear that a similar role within the rural space has never been fulfilled before, even though it is considered a necessity. To support this argument, a list of the demonstrable contributions LAGs have made to rural development are summarized below:

- over the 15 years of their existence they have proved the success and sustainability of the LEADER method;
- in the framework of their activity experts in rural problems have been “trained” who are willing to work for the countryside besides their current employment;
- they have managed to allocate subsidies without scandals;
- they have demonstrated an ability to cooperate at all levels: inhabitant – municipality – region – regional government;
- they have developed strategic plans that identify the basic needs of a region;
- in many cases they have coordinated data collection for public administration purposes;
- they have been able to repeatedly bring representatives to “the table” from different sectors and to motivate them to work for the common good and for the benefit of a region,
- they are able to provide qualified comments on centrally devised strategies;
- they have shown an ability to communicate with the inhabitants of a region, to promote not only themselves but also the countryside as such;

- they have actively created a system for training new employees in order to aid the informal transfer of know-how, including between LAGs;
- they have established a national network and organization to represent them.

The government has already invested sizeable financial resources into local action groups which were used in a reasonable way. This functional apparatus offers great opportunities for further utilization. It manages to do what the countryside and the central authorities need to do – to reinvigorate life in the regions. This is clearly being demonstrated in the finalization of their new strategies, by their active involvement in the establishment of destination management in regions, and by their intention to develop local action plans for the education system. If they are allowed to do so, due to previously established mechanisms, they will be able to “train” new employees who will become experts, and at the same time will be able to maintain the high levels of transparency. This should help to maintain the structures high resistance to cronyism and subsidy fraud. The countryside is already accustomed to its presence and relies on it. Local action groups should therefore continue to expand their activities in the future. They would thereby become an anchored structure in the legislation of the country through which rural environment development could be managed through coordination and subsidies.

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Recognition of the regional food brand “Regionální potravina Jihomoravský kraj” by consumers in the Region of South Moravia

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Abstract

This paper presents an overview of the results of research carried out in 2014 - 2015 in the Region of South Moravia, the Czech Republic. Only partial results of the research into the brand recognition of “Regionální potravina Jihomoravský kraj” (Regional food South Moravia Region) are presented. The questionnaire survey was conducted at the turn of 2014 to 2015. A sample of 450 respondents in this region was used. The Pearson’s Chi-squared test was utilized to test the independence of the brand recognition of “Regionální potravina Jihomoravský kraj” on socio-demographic factors, such as a respondents’ age, gender, level of education, as well as monthly income of their families. The results show that the majority of respondents in the Region of South Moravia do not recognize this brand and that women, young consumers and consumers with the highest family incomes are the most important target groups for this brand.

Keywords: region, marketing communication, branding, Regionální potravina Jihomoravský kraj

Introduction

The establishment of the first regional brand system (hereinafter RB) in the Czech Republic goes back to the year 2000. The trend towards seeking to create regional brands and the certification of regional production came to the Czech Republic from western countries. Its aim is to make small and middle-sized food producers more visible and more easily identifiable by consumers. Kögl and Tietze (2010), among others, state that, market saturation from both global as well as local products, product indistinguishability, the increasing awareness and demands of consumers, as well as

new trends in marketing and marketing communication, have all had a particular impact on this trend. Starzyczná and Pellešová (2009), and Frey (2010), only point to these facts in connection with increasing consumer awareness. State institutions and mainly non-profit organizations are the coordinators of the brand systems in the Czech Republic. For example, Čarnogurský (2014), or Vochozka (2008), highlight the significance and specifics of marketing communication in such types of organizations. At present, the most important task of company marketers is to increase these organizations' visibility (Frey 2010).

Developing regional brands and certifying goods is one of the ways regions are seeking to react to new marketing trends. McEntee (2003) states that, the regional branding of food is the result of consumer pressure with regards to food quality and the need to create an alternative for those who prefer to purchase local products to global ones. The regional branding of food is mainly focused on the development of rural areas with natural and cultural diversity (Tregar et al. 2007). As Hollis (2008) points out, the regional branding of food can be based on several pillars e.g. local culture, traditions and habits, nostalgia, but on the basis of logistical advantages, etc., too. La Trobe (2001) sees advantages for consumers in terms of freshness by sidelining intermediaries in the supply chain, as well as in the quality of food production for reasonable prices. He also suggests that regional food branding can be particularly significant for distant regions which depend on agricultural production; these systems bring economic benefits to them. Regional food brands therefore provide suitable opportunities for small and medium-sized local or regional producers; they produce high quality food products but lack the appropriate communication instruments (e.g. because of lack of knowledge or high costs) with which to inform customers accordingly. Research by Kalábová and Turčíňková (2012), and Horská, Ůrgeiová and Prokeiová (2011), proves the significance of branding for Czech consumers. Slabá (2015), among others, states that local brands can also be perceived positively in foreign countries e.g. in China. The development of regional brands is also closely connected to the development of a local identity (GoDu 2015). Messely et al. (2015), state that the implementation of regional branding increases a region's attractiveness for local inhabitants in all areas of their active lives – work and family life, as well as leisure time. An important factor that also influences the success of regional brand systems is local knowledge of the local brands.

Brand “Regionální potravina Jihomoravský kraj”

The brand “Regionální potravina Jihomoravský kraj”, the logo of which can be seen in Figure 1, was founded in 2010 and is incorporated in the national brand system “Regionální potravina” (Regional food); it is the most important and best known regional brand system.

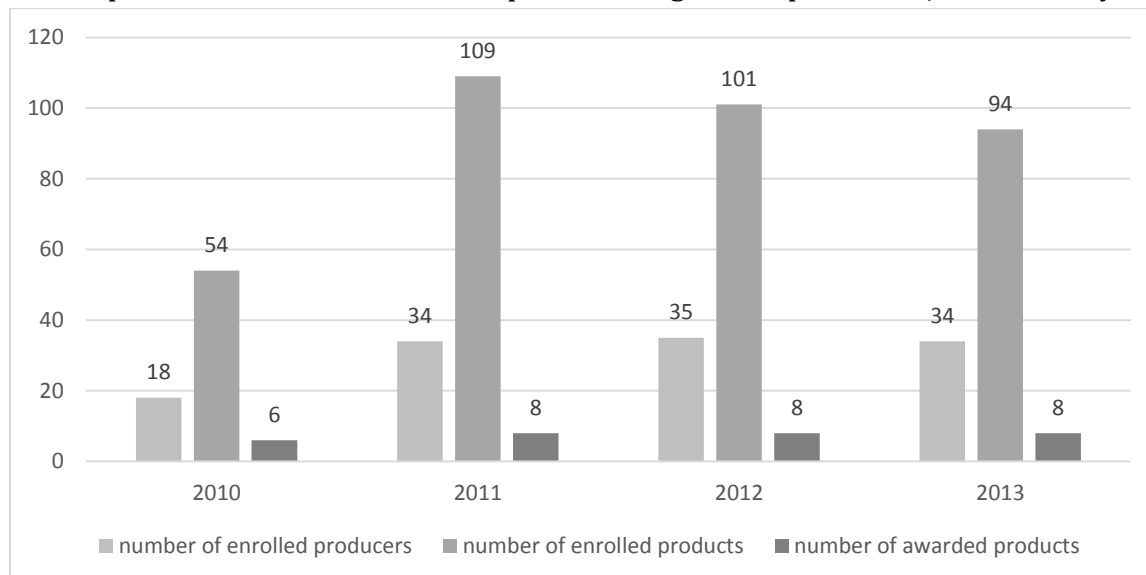
Figure 1: Brand logo of “Regionální potravina Jihomoravský kraj”



Source: Ministry of Agriculture of the Czech Republic – Regional food. Accessible at <http://eagri.cz/public/web/regionalni-potraviny/o-projektu/metodiky-a-loga/?pos=10>

The brand “Regionální potravina Jihomoravský kraj” is coordinated by the Regional Agrarian Chamber of the Region of South Moravia and is announced once a year. The brand is valid within the entire Region of South Moravia (Ministry of Agriculture of the Czech Republic 2014). The main purpose of the competition is to award the winning products in nine categories the status of a regional brand. The entrants (producers) have to fulfil 3 types of conditions (general conditions, specific conditions, regional conditions) which form the basis for the methodology for granting regional brand status. Those products that meet the given criteria are evaluated by a committee; this committee publishes its assessments and subsequently awards the winning products in each category the status of “Regionální potravina Jihomoravský kraj” (Ministry of Agriculture of the Czech Republic 2014).

Figure 2: Overview of competition entrants (producers), enrolled products and winners for the period 2010-2013 in the competition “Regionální potravina Jihomoravský kraj”



Source: authors (based on data from Regional Agrarian Chamber of the Region of South Moravia)

Figure 2 shows that since 2010, when the brand “Regionální potravina Jihomoravský kraj” was established, the number of producers that enrolled in the competition remained constant, but that the number of products enrolled increased approximately twofold.

Table 1 gives an overview of important facts about the brand “Regionální potravina Jihomoravský kraj”.

Table 1: Facts about the brand “Regionální potravina Jihomoravský kraj”

Regional brand	Regionální potravina Jihomoravská kraj
Region's location	Jihomoravský kraj – Region of South Moravia
Area	7 196 km ²
Population	1 166 313 inhabitants
Population density	162 inh./km ²
Potential of the region	Agriculture, wine growing, tourism
Present situation (finances)	Support from EU and Ministry of Agriculture
Coordinator	The State Agricultural Intervention Fund and Regional Agrarian Chamber of the Region of South Moravia
Conditions of membership	Competition
Criteria for certification	Origin and quality of production
Number of certified products (2013)	33
Established	2010
Distribution channels	Farmers markets, mobile shops, health food shops, supermarkets and hypermarkets.
Brand's focus	Food production
Certification duration	2 years
Conditions for certification – product	Fulfillment of criteria according to methodology
Conditions for certification – companies	Fulfillment of criteria according to methodology
Product categories	9

Source: authors

When granting a brand, the evaluation committee considers the following (Regional Agrarian Chamber of the Region of South Moravia 2014):

1. *innovative aspects (originality, origin, regionalism, innovation in manufacturing);*
2. *sensory evaluation (taste, design, smell, etc.);*
3. *used materials, ingredients and method of production (technological aspects, use of local ingredients – percentage of South Moravia origin);*
4. *product design (branding, design, wrapping technique, protection against damage);*
5. *specific and supporting evaluation (product's impact on health, product availability, organic product).*

The origin of the product is a fundamental criterion when applying for it to be awarded the status of "Regionální potravina Jihomoravský kraj". The product must be made of local ingredients sourced from the Region of South Moravia, or if required for objective reasons, domestic sources. The minimum ratio of such ingredients is 70%. The main ingredient has to be of 100% domestic origin. All other ingredients must be listed, including the percentages and origins thereof (Ministry of Agriculture of the Czech Republic 2014).

Materials and Methods

This paper presents the partial results of research into the impact of socio-demographic factors on the brand recognition of "Regionální potravina Jihomoravský kraj". At the turn of 2014 and 2015, primary research was undertaken among consumers aged 18-65 years in all the main provincial towns in South Moravia (excluding the regional capital, Brno) - Blansko, Břeclav, Hodonín, Vyškov and Znojmo. Respondents were selected on the basis of quotas for specific socio-demographic characteristics (age, sex, monthly family income, education). The responses of 450 participants who took part in the survey were selected for further analysis. The data were analyzed using the Pearson's Chi-square test of independence to test the null hypothesis. The null hypothesis was determined as follows: "Recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the chosen socio-demographic factor".

This paper presents the first results of the Pearson's Chi-square test of independence on the following hypotheses:

H1: Recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the respondents' gender.

H2: Recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the respondents' age.

H3: Recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the respondents' level of completed education.

H4: Recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the respondents' net income.

Categorical data were obtained during the analysis of the questionnaire survey. Contingency tables were subsequently used as an easy way to display the relations between this data. Subject to the character of the data, suitable tests of independence were carried out (see Hendl 2006). According to Řezanková (1997), for the purpose of a contingency table of the $r \times c$ type (r is the number of rows, c is the number of columns), the following test statistic was used the most often:

$$\chi^2 = \sum_i \sum_j \frac{(n_{ij} - e_{ij})^2}{e_{ij}} \quad (1)$$

Alternatively:

$$G^2 = \sum_i \sum_j n_{ij} \ln \frac{n_{ij}}{e_{ij}} \quad (2)$$

e_{ij} is the expected and n_{ij} the observed frequency. Either the test statistic χ^2 of Pearson's chi-square was used to test independence, or G^2 for the likelihood-ratio test. These two statistics are asymptotically $\chi^2_{(r-1)(c-1)}$ distributed. The null hypothesis of the test assumes independence.

In order to apply the Pearson's Chi-square test, a maximum of 20% of the expected frequencies must be less than five (see Řezanková 2007; Agresti 1990). Where this test could not be applied, Fisher's exact test was used or the simulated p-value of the χ^2 statistic was calculated (see Anděl 2005).

The p-value for each hypothesis was calculated by means of the Statistica software. Where $p < 0.05$, the null hypothesis was rejected in favour of an alternative hypothesis on the basis of the assumption of the dependence of the variables.

Results

The results of the research show that consumers in the Region of South Moravia do not recognize the brand "Regionální potravina Jihomoravský kraj". Of the 450 respondents, only 211 (46.9% of the investigated sample) answered positively to the question whether they were familiar with the brand.

Table 2: Recognition of the brand "Regionální potravina Jihomoravský kraj" according to gender

Recognition of brand "Regionální potravina JmK"	Men	Women	Row Totals
Yes	91	120	211
Column %	43.33%	50.00%	
No	119	120	239
Column %	56.67%	50.00%	
Total	210	240	450

Source: authors

Table 2 shows that 91 men (i.e. 43.33%) and 120 women (i.e. 50%) said they knew the brand “Regionální potravina Jihomoravský kraj”. Women in the region therefore know the brand better than men.

Table 3: Dependence of recognition of the brand “Regionální potravina Jihomoravský kraj” on the respondents’ gender

	Chi-square	df	P
Pearson’s Chi-square	1.998850	df=1	p=0.15742

Source: authors

The p-value of Pearson’s Chi-square test of independence is 0.16. The hypothesis of independence was therefore not rejected at a level of independence of 5%. The H1 hypothesis - recognition of the regional brand “Regionální potravina Jihomoravský kraj” does not depend on the respondents’ gender – was therefore confirmed.

Table 4: Recognition of the brand “Regionální potravina Jihomoravský kraj” depends on the respondents age

Recognition of the brand “Regionální potravina JmK”	18 - 35 years	36 - 50 years	51 - 65 years	Row Totals
A	76	70	65	211
Column %	50.67%	46.67%	43.33%	
B	74	80	85	239
Column %	49.33%	53.33%	56.67%	
Totals	150	150	150	450

Source: authors

The results of the research presented in Table 4 show that the brand recognition of “Regionální potravina Jihomoravský kraj” is the highest (50.67%) among the youngest consumers (age category 18-35 years). The brand is only slightly less well-known by those respondents in the age category 36-50 years (46.67 %). The respondents with the lowest level of brand recognition (43.33%) were the oldest consumers (age category 51-60 years).

Table 5: Dependence of recognition of the brand “Regionální potravina Jihomoravský kraj” on the respondents age

	Chi-square	df	p
Pearson’s Chi-square	1.624066	df=2	p=0.44395

Source: authors

When considering the dependence of knowing the brand according to age, the p-value of Pearson's Chi-square test of independence is significantly higher than the defined level of significance. The H2 hypothesis was therefore not rejected at a level of significance of 5%. The H2 hypothesis - recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the respondents' age - was therefore confirmed.

Table 6: Recognition of the brand "Regionální potravina Jihomoravský kraj" depends on the level of completed education

Recognition of the brand "Regionální potravina JmK"	Elementary school	High school and apprenticeship	College	University and Higher Technical School	Row Totals
A	20	73	80	38	211
Column %	44.44%	44.24%	47.06%	54.29%	
B	25	92	90	32	239
Column %	55.56%	55.76%	52.94%	45.71%	
Totals	45	165	170	70	450

Source: authors

On the basis of the results in Table 6 it can be concluded that brand recognition is the highest among those respondents with the highest education i.e. university and higher technical school (54.29% of respondents). The brand recognition levels among respondents with completed elementary school, high school or college education were very similar, ranging between 44.24 - 47.06%.

Table 7: Dependence of recognition of the brand "Regionální potravina Jihomoravský kraj" on the respondent's level of completed education

	Chi-square	df	p
Pearson's Chi-square	2.111910	df=3	p=0.54951

Source: authors

The p-value of Pearson's Chi-square test of independence is 0.54. The hypothesis of independence was therefore not rejected at a level of significance 5%. The H3 hypothesis - recognition of the regional brand "Regionální potravina Jihomoravský kraj" does not depend on the respondent's highest level of completed education - was therefore confirmed.

Table 8: Recognition of the brand “Regionální potravina Jihomoravský kraj” depends on the respondent’s net monthly income

Recognition of the brand “Regionální potravina JmK”	Up to CZK 25,000 incl.	CZK 25,001-50,000	CZK 50,001 and above	Row Totals
A	87	102	22	211
Column %	40.28%	51.78%	59.46%	
B	129	95	15	239
Column %	59.72%	48.22%	40.54%	
Totals	216	197	37	450

Source: authors

The results presented in Table 8 show that brand recognition is the highest among those respondents with a net monthly income of over CZK 50,000 (59.46 %). Approximately half of those respondents with a net monthly income of CZK 25,000 – 50,000 recognized the brand too. The poorest level of brand recognition was in the group of respondents with a net monthly income of up to CZK 25,000 (40,28 %).

Table 9: Dependence of recognition of the brand “Regionální potravina Jihomoravský kraj” on the respondent’s level of net monthly income

	Chi-square	df	p
Pearson’s Chi-square	8.028584	df=2	p=0.01806

Source: Own elaboration

The p-value of Pearson’s Chi-square test is 0.02. The H4 hypothesis - recognition of the regional brand “Regionální potravina Jihomoravský kraj” does not depend on the respondent’s level of net monthly income - was rejected at a level of significance of 5%. For the Region of South Moravia it was statistically proven that the recognition of the brand is dependent on net monthly family income.

Discussion

The results of the research show that the level of brand recognition for the regional brand “Regionální potravina Jihomoravský kraj” among consumers is low. The brand was unknown to more than half of the addressed respondents. Similar research conducted in 2015 on brand recognition in the Vysočina region showed that 53.8% of respondents knew the local regional brand (Chalupová and Prokop 2016). Consumers in the Vysočina region therefore knew their regional brand better than in South Moravia. Similar research conducted in 2012 in the Vysočina region established levels of brand recognition of only 35.9% (Chalupová, Prokop and Rojík 2012).

Further analysis of the results shows that brand recognition of the regional brand “Regionální potravina Jihomoravský kraj” is greater among women than men, although dependence was not statistically proven. This finding can be interpreted, for example, within the context of research results published by the agency Factum Invenio (2008), and Vysekalová and Mikeš (2009, p. 30), who concluded that among Czech consumers, women prefer brands more often than men. Based on the research results presented in this paper, it can be stated that the levels of brand recognition for the given brand was the highest amongst those respondents with a university degree and in the youngest age category (18-35 years). It has been proven, that both groups when making purchasing decisions gain information from more sources, and contrary to other groups use the internet as their source of information (Rojík 2015). The most interesting fact is that the dependence of brand recognition of the given brand on net monthly income was statistically proven. The results show that those respondents with a net monthly income of over CZK 50,001 know the given brand the most. The lowest level of brand recognition was among those respondents with a net monthly income of up to CZK 25,000.

The results should also be viewed in parallel with the findings of Zámková and Prokop (2014), who investigated the levels of brand recognition for products marked as BIO (organic). Their research showed that consumers with higher incomes knew the food products labelled BIO less well than those with lower incomes. Similar conclusions were presented by Rojík, Chalupová and Prokop (2014), who found that consumers with lower incomes were more aware of regional foods in the Vysočina region than those consumers with higher incomes. These facts highlight the specific characteristics of South Moravian consumers, regional differences, as well as consumers’ attitudes to products marked as “regional food” and as “BIO”.

Conclusion

In the Czech Republic, regional food branding is a rather new tool for informing consumers and gaining their interest in locally produced food. Food labelled as a regional brand, in contrast to larger scale food production, does not tend to attract consumers on the basis of, for example, low prices. In addition to fulfilling a consumer’s basic needs, regional brands also try to satisfy consumers’ higher demands for quality, ingredients, etc. Defining this specific added value is one of the objectives of marketing such regional brands. The findings presented in this research show that consumers in the Region of South Moravia are not very aware of the Czech regional brand system (or its regional brand “Regionální potravina Jihomoravský kraj”). For example, in the border region of Lower Austria, 64.5% of addressed consumers know the brand Genuss Niederösterreich, the Austrian equivalent of the Czech regional brand (Rojík 2015). The main aim of The State Agricultural Intervention Fund and Regional Agrarian Chamber of the Region of South Moravia is to improve publicity and increase awareness of the regional brand in the region. The results also show that brand recognition among women was higher, which reflects the fact that women prefer branded food much more

often than men, which in terms of marketing makes women the more interesting target group. The research also showed that brand recognition was higher amongst younger people and those respondents with the highest level of completed education, making them also an attractive target group for marketers. Even in those groups in which brand recognition is poor there are opportunities for marketers to increase awareness. However, the most significant group in the Region of South Moravia for marketers is the group of respondents with the highest incomes, simply because branded products usually sell for higher prices. This extensive research is one of the first to have been conducted in the Region of South Moravia focused on regional food branding. The results presented in this article could be put to practical use in marketing terms, but also STP processes, by the coordinators of this regional food brand and other food brand coordinators in the Region of South Moravia.

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Stakeholder profile and stakeholder mapping of SMEs

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Abstract

The current turbulence in the economic environment has led to the need for new managerial tools to be used such as stakeholder analysis. Since there are a large number of stakeholder groups in small and medium-sized enterprises, the identification and prioritisation of stakeholders (as a key part of stakeholder analysis) is considered an important element in their management. The purpose of this article is to identify, prioritize and map key stakeholder groups in small and medium-sized enterprises in the Czech Republic, with a view to being able to generate stakeholder profiles of the most important stakeholder groups. The identification of the key stakeholder groups was based on research conducted by the author, whilst the prioritisation of the stakeholder groups on the basis of the professional judgement of the respondents. A power-interest matrix was subsequently compiled to map the stakeholder groups. The results of the research identified customers, employees, competitors, suppliers and media as being the five key stakeholder groups in small and medium-sized enterprises.

Keywords: stakeholder, stakeholder identification, stakeholder profile, stakeholder prioritisation, stakeholder mapping

Introduction

Within the EU there are an estimated 20.7 million small and medium-sized enterprises (hereinafter SMEs). These enterprises employ more than 87 million people and form the 'backbone' (98%) of the European economy (Ecorys 2012). The same is true in the Czech Republic, where approximately 98% of all enterprises operating in the market are SMEs. The competition in the SME sector is

therefore very strong. How do small and medium-sized enterprises successfully compete under such competitive conditions? Research has shown that the current turbulent economic environment has led to the growing popularity of the so-called stakeholder approach (Payne, Ballantyne and Christopher 2005; Rivera-Camino 2007; Varvasovszky and Brugha 2000; Olander and Landin 2005; etc.). They conclude that comprehensive stakeholder analysis and mapping, as a means by which to completely understand an organization's stakeholder community, is one of the possible ways how to be successful against the competition. All companies and institutions are in fact influenced by a large number of various stakeholders, with their activities also having an impact on stakeholder groups too. Stakeholders are very beneficial to companies in helping them to achieve their vision, mission and goals, but can also pose a threat to them because they potentially wield great power over them (Chinyio et al. 2010; Gibson 2000). All institutions therefore have to pay appropriate attention to the most important stakeholder groups. Stakeholder data collection, analysis, mapping and profiling allows companies to gain insights into the interests, requirements and needs of stakeholders, as well as enables them to identify opportunities for influencing stakeholders that serve decision making processes in particular contexts (Varvasovszky and Brugha 2000).

The term "stakeholder" is currently being widely researched across a broad range of study fields – not only with regards to commercial institutions, such as in the paper by Buysse and Verbeke (2003), but also, for example, with regards to health services, such as in the paper by Brugha and Varvasovszky (2000), or with regards to education institutions, such as in articles by Mainardes, Alves and Raposo (2010), and Rowley (1997). Despite this, research into stakeholders and stakeholder analysis in the Czech Republic receives little to no attention at all. The importance of managing stakeholders is, for example, highlighted in the empirical research by Šimberová (2008). The aim of her article was to identify key stakeholder groups in selected SMEs in the Czech Republic, to determine their profiles and map them.

Defining basic terms

At this stage, it is important to define what is understood under the terms "stakeholder profile", "stakeholder analysis" and "stakeholder mapping". A literature review reveals a wide range of discussions on, and approaches to, the topic. For the purposes of this research, the understanding of the basic terms will be based on the definitions given in the papers, articles and research carried out by the following authors – Freeman (2010), Mitchell, Agle and Wood (1997), Okui (2011), Varvasovszky and Brugha (2000), Walker, Bourne and Rowlinson (2008), Bourne (2008), Weaver and Bourne (2002), etc.

According to Freeman's first definition of a stakeholder, as published in the mid-1980's, a stakeholder is "any group or individual who can affect or is affected by the achievement of an organization's purpose" (Freeman 2010). There are many narrower and broader definitions of who stakeholders and stakeholder groups are, but fundamentally all the definitions describe a stakeholder as an individual or groups that affect and/or are affected by an organization's activities. Chinyio, et al. (2010) state that "stakeholders can affect an organization's functioning, goals, development and even survival." At a basic level, stakeholders interact with each other and are related to each other. The interactions between stakeholders include – the provision of support, funds and resources, the exchange of information, products, etc. (Pouloudi 1997; Pouloudi and Whitley 1997).

Stakeholder analysis deals with the identification and prioritization of stakeholders as individuals or stakeholder groups (Freeman 1984). Stakeholder analysis represents "an approach for understanding a system by identifying the key actors or stakeholders in the system, and assessing their respective interests in that system" (Grimble et al. 1995).

Varvasovszky and Brugha (2000) define stakeholder analysis as an approach, a tool or a set of tools for generating knowledge about the actors – individuals and organization – so as to understand their behaviour, intentions, interrelations and interests; and for assessing the influence and resources they bring to bear on decision-making or implementation processes. The aim of stakeholder analysis is to understand the stakeholders from the organization's point of view and to determine the relevance and importance of stakeholders for an organization (Brugha and Varvasovszky 2000). The importance of stakeholders is determined by their prioritization. An important part of stakeholder analysis is the identification of the interests, influence, position, interrelations and priorities of, as well as other statistics on, the stakeholders and stakeholder groups.

Stakeholder mapping is a support tool for the analysis of the stakeholder community and a tool for supporting the decision making processes of managers. There are different methods, matrixes, grids and maps that utilize different characteristics to map the stakeholder community e.g. influence, attitude, power, interest, support and legitimacy (Bryson 2004; Mitchell, Agle and Wood 1997; Olander and Landin 2005; Chinyio et al. 2010).

There are lots of different factors that influence a stakeholder's profile e.g. interest in the issue, influence, power, support, vested stake expectations, requirements, direction of influence (downwards, upwards, outwards, sideways), proximity, urgency, value, action, etc. (Mitchell, Agle and Wood 1997; Bourne 2008; Bourne and Walker 2006; Brugha and Varvasovszky 2000; Reed et al. 2009).

Materials and methods

The research was carried out using the quantitative research methodology. This involved obtaining data through a survey conducted among selected SMEs. The basis for the survey was a structured questionnaire. The questionnaire was compiled on the basis of a literature review and the aims of the research. In total, 350 questionnaires were returned, of which 38 questionnaires had to be rejected due to the incomplete answers of respondents.

The main aim of this article is to identify, prioritize and map the stakeholders in selected SMEs in the Czech Republic, and to generate relevant stakeholder profiles. All companies can be categorized as being either micro, small, medium or large according to the number of employees and annual turnover (see Table 1). This article focuses on the group of companies that fall under the categories micro, small and medium-sized and which combined are usually referred to as SMEs (small and medium-sized enterprises) because they represent 98% of the European economy.

Table 1: Categorisation of SMEs

Category	Number of employees	Annual turnover
Micro	<10	≤ € 2 million
Small	10-49	≤ € 10 million
Medium	50-249	≤ € 50 million

Source: Ecorys, 2012; European Commission, 2003

To form the basis for the research, it was necessary to compile an initial list of stakeholder groups. A literature review of foreign scientific literature and research into stakeholder management, profiling, analysis and mapping was undertaken. As a result, the following stakeholder groups were identified (Andriof et al. 2002; Buysse and Verbeke 2003; Chinyi et al. 2010; Freeman 2010; Freeman 1984; Weaver and Bourne 2002; Bourne and Walker 2006; Šimberová 2008):

- banks and financial institutions, communities (general communities, local communities, etc.), competitors, consultancy firms (taxes, financial and other consultancy), customers, contractors, educational institutions, employees, end users, government (local and state government), management, media, owners, subcontractors, suppliers, trade unions and associations, transporters, etc.

It is clear from the above that there are many stakeholder groups that are able to influence a company or that could be influenced by a company's activities. All these groups can be divided into the following groups (Chinyio et al. 2010; Freeman 2010):

- internal and external;
- primary and secondary.

The results of a literature review into stakeholder groups in the Czech market, and their subsequent categorization into one of these four groups, is presented in Table 2.

Table 2: Identified stakeholder groups in SMEs on the Czech market

Type of stakeholder group			
Primary	Secondary	Internal	External
Customers, Employees, Suppliers, Government, Competitors	Banks and financial institutions, Consultancy firms, Education institutions, Local communities, Media, Transporters	Employees, Management, Owners, Shareholders	Banks and financial institutions, Competitors, Consultancy firms, Customers, Education institutions, Government, Local communities, Media, Suppliers, Transporters

Source: authors

With respect to the length of the questionnaire it was necessary to reduce the number of stakeholder groups. As a result, only 14 basic stakeholder groups were selected which are commonly used in stakeholder analysis for commercial organisations. The final list of stakeholder groups was as follows:

- banks
- competitors
- consultancy firms
- customers
- educational institutions
- employees
- government
- local communities
- management
- media
- owners
- suppliers
- shareholders
- transporters

For those cases where respondents considered another stakeholder group as being very important for their activities, the open choice “other” was added to the questionnaire.

The results of the survey and the gathered data were subsequently analysed in two stages. Firstly, through traditional statistical methods (mainly absolute and relative frequencies and the standard deviation) in order to identify and analyse

the key stakeholders in SMEs and their prioritization on the basis of the professional judgement of respondents.

In the line with this fact, the main research problems were defined as follows:

- identification of stakeholder groups and the definition of stakeholder profiles of selected SMEs in the Czech market
- prioritization of stakeholder groups of selected SMEs in the Czech market based on the professional judgment of respondents
- mapping of key stakeholder groups in selected SMEs in the Czech market.

Secondly, through stakeholder analysis. As stated above, there are several different approaches to stakeholder analysis described in literature (see Okui (2011); Varvasovszky and Brugha (2000); Walker, Bourne and Rowlinson (2008); Bourne (2008); Weaver and Bourne (2002)). For the purposes of this research the Stakeholder Circle Methodology, as developed by Linda Bourne, was used. Bourne (2008) defines the following factors for the definition of stakeholder profiles (Bourne 2008; Walker, Bourne and Rowlinson 2008; Weaver and Bourne 2002):

- influence and direction of influence (downwards, upwards, outwards, sideways, internal, external)
- interest (rating 1 - completely uninterested to 5 - highly interested)
- power – power of stakeholder to influence the company (rating 1 - low to 4 - high)
- proximity – closeness of the stakeholder to company (rating 1 - low to 4 – high)
- vested stake – how much a stakeholder group could gain or lose based on the company's outcome (rating 1 - low to 5 – high)
- importance to (stakeholder action) – level of importance of the company and its outcomes on the stakeholder group (rating 1 - low to 5 – high).

The prioritisation of the stakeholder groups as determined by the professional judgement of the respondents, was calculated according to the following formula:

$$Total\ points = \sum_{i=1}^{14} (14 - i) * n(i)$$

Legend:

i - stakeholder position according to individual ranking of priority

n - number of occurrences of a given position of priority

14- maximum number of stakeholder groups

For mapping purposes the approaches of Bryson (2004) and Ackermann, Eden and Brown (2004) were used. These authors evaluated two characteristics - power and interest – to create a power-interest grid (matrix). Both characteristics were rated on a scale of 1 – 5 in accordance with the rating system for the Stakeholder Circle Methodology. Based on the stakeholder power-interest matrix, the stakeholders

were subsequently divided into four basic groups (Olander and Landin 2005; Ackermann and Eden 2011):

- context setters – stakeholder group with high potential
- key players – stakeholder group with a high level of interest and power
- crowd - stakeholder group with low level of interest and power
- subjects - stakeholder group with a high level of interest and low level of power.

The structure of the participants on the basis of the conducted survey for this research are summarized in Table 3.

Table 3: Structure of respondents according to the categorisation of SMEs

Number of employees	Absolute frequency	Relative frequency (in %)
<10	96	31
10-49	178	57
50-250	38	12
Annual turnover		
≤ € 2 million	122	39
≤ € 10 million	157	50
≤ € 50 million	33	11

Source: authors

From the results it is evident that 57% of respondents have 10-49 employees, that the annual turnover of nearly 50% of the respondents is less than EUR 10 million, and that the majority of respondents fall into the category of micro and small-sized enterprises.

Results and discussion

In this section the results of the survey with regards to the main research problems are analysed. As part of the survey, the respondents were asked to identify the stakeholder groups on which they focus and to assign their priority to each based on their own professional judgement. The results of the respondents' evaluations are presented in Table 4.

Table 4: Stakeholder groups in SMEs in the Czech Republic

Stakeholder group	Absolute frequency	Relative frequency (in %)	Priority	Standard deviation for priority
Banks	66	21.15	6	1.09
Competitors	213	68.27	3	0.81
Consultancy firms	45	14.42	12	1.34
Customers	294	94.23	1	0.6
Educational institutions	96	30.77	11	1.57
Employees	240	76.92	2	1.92
Government	69	22.12	7	0.74
Local communities	42	13.46	14	1.11
Management	63	20.19	10	1.34
Media	150	48.08	5	0.72
Others	-	-	-	-
Owners	18	5.77	9	0.67
Shareholders	30	9.62	13	1.85
Suppliers	168	53.85	4	0.66
Transporters	93	29.81	8	2.09

Source: authors

Note: the option "other" was not used by any of the respondents and is therefore not included in any of the further analysis.

All of the listed stakeholders were chosen by at least several respondents. Contrary to expectation (100%), customers were only selected by 94% of the respondents. The most likely reason for this is that several respondents, according to the NACE classification, fell under the categories: public administration and defence; compulsory social security; and education. These respondents did not identify this stakeholder group. This is in spite of the fact that, for example, Bruga and Varvasovszky (2000) and Bryson (2011) emphasize the necessity of stakeholder analysis in the non-profit and public sectors and a focus on customers or clients. It is clear that the public sector, public administration and defence and education institutions have a very different perception of customers and that this is the main reason why these institutions did not identify this stakeholder group. All traditional commercial entities selected customers as the most important stakeholder group. Employees were also identified by the majority of respondents, however in this case the range of differences in the assigned priority levels varied from 2 to 7, and on the odd occasion even 10. Employees as a stakeholder group were assigned priority 2 based on the calculated standard deviation (1.92). The

largest standard deviation was calculated for transporters (2.09). More than 50% of the respondents also identified competitors and suppliers. In spite of the fact that media was identified by only 48% of the respondents, media is considered to be the fifth most important stakeholder group based on the professional judgement of the respondents. On the basis of this research, the most important stakeholder groups were identified as being customers, employees, competitors, suppliers and the media.

In the second part of the questionnaire, respondents were asked to evaluate the basic characteristics – power, proximity, vested stake, importance to (stakeholder action) and interest – in order to comprehensively define the stakeholder profiles. The direction of influence - outwards (O), sideways (S), downwards (D), upwards (U) - of each stakeholder group was subsequently determined on the basis of the Stakeholder Circle Methodology. The characteristics of the stakeholder profiles are summarized in Table 5.

Table 5: Basic characteristics of stakeholder profiles

Stakeholder group	Power	Proximity	Vested stake	Importance to (action)	Interest	Direction of influence
Banks	4	2	4	3	4	O
Competitors	4	1	1	3	4	S
Consultancy firms	2	1	2	2	3	O
Customers	4	2	4	5	4	O
Educational institutions	1	1	1	1	1	O
Employees	3	4	4	5	4	D
Government	2	2	3	3	2	O
Local communities	2	1	1	2	3	O
Management	4	3	4	5	5	U
Media	4	1	1	4	2	O
Owners	4	4	5	5	5	U
Shareholders	4	2	4	4	5	U
Suppliers	3	1	2	3	3	O
Transporters	1	1	1	1	2	O

Source: authors

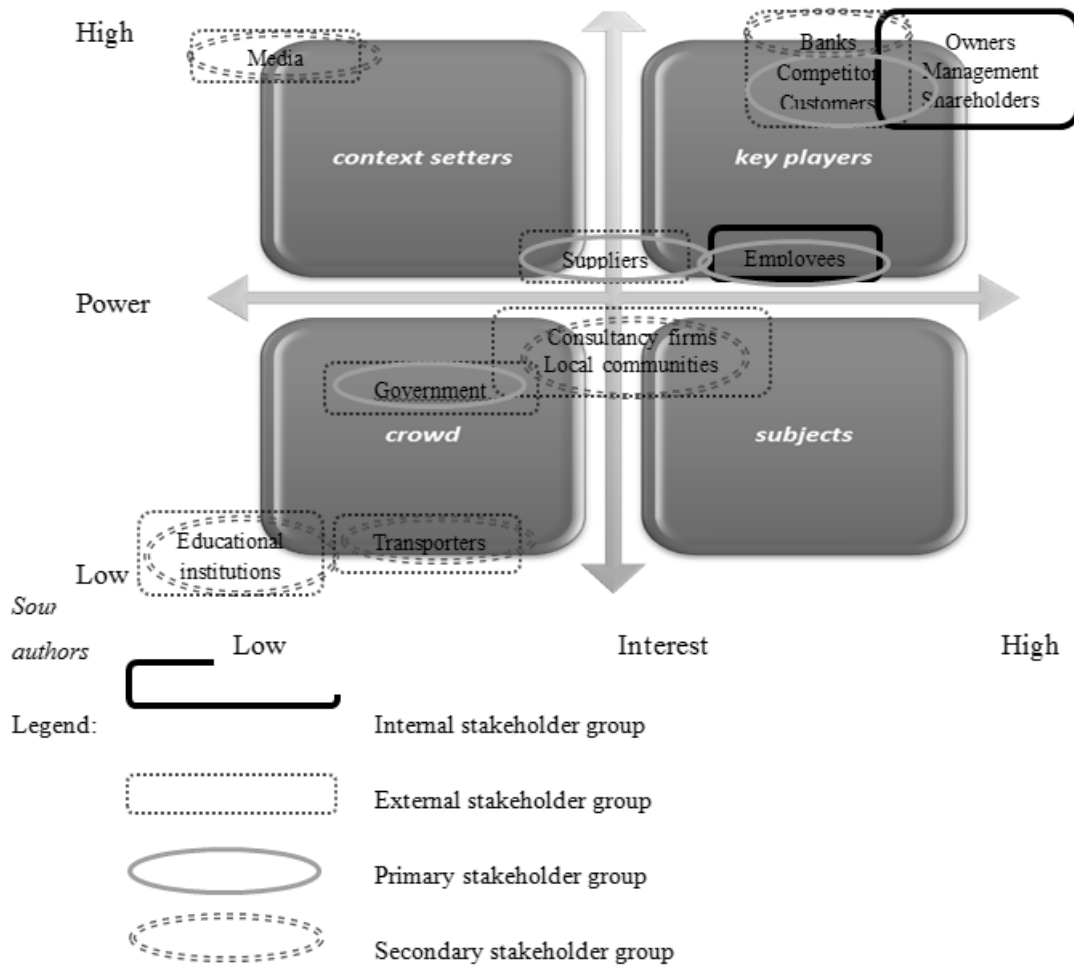
The results of the stakeholder profile evaluation show that the majority of stakeholders are identified as having an outward directional influence and are

external stakeholders. Managers, owners and, most importantly, shareholders, have an upward direction of influence, whereas employees a downward influence. Under the Stakeholder Circle Methodology the direction of influence is mainly used within the context of patterns of communication. However, this facet of the methodology is not relevant to this research in terms of the identification of key stakeholders and the definition of stakeholder profiles and is therefore not discussed further. The power of stakeholders is connected with their ability to influence a company. The results of the survey show that those stakeholder groups with the greatest power to influence a company are banks, competitors, customers, management, media, owners and shareholders. Bourne suggests that their level of power is so high that they are in a position to destroy a company's activities (Bourne 2008; Bourne and Walker 2006). In contrast, transporters, suppliers and educational institutions have the lowest level of influence on the selected SMEs. In terms of proximity, many of the stakeholder groups have no direct contact with the company. Logically, this is not the case for internal stakeholder groups such as the owners, employees and management.

Vested stake is connected with the stake of the stakeholder in a company's outcomes. The outcomes of SMEs are important to customers, employees, management, owners, as well as shareholders. On the other hand, there are several stakeholder groups with limited or no stake in their outcomes – competitors, media, transporters and education institutions. The characteristic "importance to" stakeholder action is connected with the level of probability that a stakeholder will make an effort to influence the company. Those stakeholder groups that were identified as having the highest probability of making significant efforts to influence the outcomes of the company were customers, media, employees, management and banks. The other stakeholder groups are connected with a low probability of attempting to influence a companies' outcomes. SMEs should therefore focus their efforts on understanding and the subsequent satisfaction of the needs, wants and requirements of those stakeholder groups that are identified as having a high level of importance to (stakeholder action) i.e. there is a high probability they will make significant efforts to influence the outcomes of the company.

The stakeholder power-interest matrix was prepared on the basis of the results presented in Table 5 (see Figure 1).

Fig. 1: Stakeholder power-interest matrix



The key players are represented by the most important stakeholder groups in the power-interest matrix. As can be seen in Figure 1, all the internal stakeholder groups are considered to be key players i.e. owners, management, shareholders and employees, as are the external stakeholder groups represented by customers, competitors and banks. These stakeholder groups wield great power and have high interest. As a result, the management of the SMEs must fully engage them and give sustained attention to the satisfaction of their needs and expectations (Ackermann and Eden 2011). The key players wield great power to influence the outcomes of SMEs. The level of this power is sometimes so high that the stakeholders are in a position to destroy a company’s activities and outcomes (Bourne 2008). All the key players are represented by stakeholder groups with high vested stake and with medium to high importance to (stakeholder action). Most of the key players are primary stakeholder groups.

The external stakeholder groups, as represented by government, transporters and educational institutions fall under crowds. These stakeholder groups can be seen

as potential stakeholder groups because they have low levels of interest and power. Managements usually make little effort towards these stakeholder groups (Ackermann, Eden and Brown 2005). Those stakeholders that are powerful, but disinterested, are context setters. The context setters are represented by the media. The media's power can have a potentially large influence on other stakeholder groups. Local communities and consultancy firms have medium interest and lower levels of power to influence companies. Suppliers have medium interest, as well as power. Suppliers have the power to influence the outcomes of the majority of SMEs. It is therefore necessary to pay appropriate attention to this stakeholder group.

Conclusion

As there are a large number of stakeholder groups in SMEs, it is important to be able to identify who the key stakeholder groups are and to prioritize them. The main aim of this article was to do just that and to map and define the stakeholder profiles of the most important stakeholder groups. A literature review provided a list of basic stakeholder groups, which was subsequently adapted to the situation for SMEs in the Czech market. The final stakeholder groups were identified as: internal; external; primary; and secondary. The selected stakeholder groups were confirmed through primary research and a questionnaire survey. The research was conducted in the Czech Republic. In total, 312 small and medium-sized enterprises participated in the survey. The survey sample involved all categories of SMEs and nearly all types of organisations according to the NACE classification. For 94% of the organizations, customers were the most important stakeholder group.

The key stakeholders were identified through data analysis, and their profiles defined on the basis of the Stakeholder Circle Methodology. The research revealed that the most important stakeholder groups, sorted by priority, were customers, employees, competitors, suppliers and the media.

Šimberová also identified customers in her research as the most important stakeholder group, followed by employees and suppliers respectively. As is the case in this research, banks were considered to be only the sixth most important stakeholder group.

The stakeholder profiles for all stakeholder groups were identified on the basis of the Stakeholder Circle Methodology. All the key stakeholder groups wield great power to influence or change the activities of a company (3 or 4). Employees represent the only stakeholder group that is closely associated to a company. Other key stakeholder groups are relatively removed from the company. The outcomes of a company are very important for customers and employees, whereby there is a high probability that customers will try to influence the outcomes of the company.

On the basis of the research it is possible to conclude that the most important characteristics for the identification, prioritization and subsequent successful management of relationships with key stakeholders are power, interest, importance to (stakeholder action) and vested stake. The direction of influence and proximity will be used in more in-depth stakeholder analyses. This is essential from a marketing point of view with regards to the preparation of appropriate communications with the key stakeholder groups and their subsequent engagement. Maintaining good relations with these stakeholder groups is of particular importance to SMEs because they wield great power to influence the organisation itself, its activities and its outcomes. By focusing on the creation of lasting, long-term, quality relationships with their key stakeholder groups, SMEs will gain mutual support and cooperation.

The results of this research also show that 4 out of 5 key stakeholder groups are external groups. The most important internal stakeholder group is represented by employees. Fiala, Prokop and Živelová (2012), state that it is not only necessary to pay sufficient attention to appropriate communications with this group too, but to also focus on inter-organizational trust. Inter-organizational trust directly affects the performance of employees and therefore of the company too (Fiala, Prokop and Živelová 2012).

As stated above, the creation of appropriate targeted marketing communications is possible on the basis of the identification, prioritization and mapping of stakeholder groups. The Stakeholder Circle Methodology offers the opportunity to identify the appropriate means of engagement so that the marketing communications target the specific needs, attitudes, requirements and expectations of the key stakeholder groups (Walker, Bourne and Rowlinson 2008). The Stakeholder Circle Methodology uses the Engagement Index for this purpose. The identification of all the elements and characteristics necessary for targeted communications based on the Engagement Index will be the topic of follow-on research by the author.

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The short-term relationship between unemployment and home ownership

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Abstract

This work focuses on the Oswald hypothesis and answers the question about what the relationship is between changes in home ownership and unemployment on an individual level in the Czech Republic. The first and main hypothesis is that a transition to home ownership reduces the probability of unemployment in the following year. Data from EU-SILC proves that this hypothesis holds true, but only for men and not for women. With this in mind, we present a second hypothesis that argues that the relationship between homeownership and unemployment on an individual level varies over time in relation to the lower and higher probability of unemployment. The primary reason for this is the “mortgage effect”, which is later outweighed by the migration effect. The research shows that the transition to unemployment does not affect the possibility of a transition to home ownership in the following year, neither for men nor women. For the third hypothesis, the expectation was that there would be a significant difference between men and women. This was confirmed because the first hypothesis holds true only for men and not for women.

Keywords: Home ownership, unemployment, Oswald.

Introduction

The interaction between the labour market and the housing market has raised a number of fundamental questions among economists over the last two decades. Oswald (1996, 1999) claims that the growth in the unemployment rate is connected to the growth in the home ownership rate. He estimated this relationship and found that the unemployment rate increases by two percentage points if the home ownership rate in a region increases by ten percentage points. The relationship was confirmed across European countries, US states and even in regions within particular countries. Canada, Norway, and a few other countries, were the exceptions to the rule.

A number of papers appeared in reaction to the Oswald hypothesis. These can be divided into two groups. The first group analyses the micro level (individuals) and the second the macro level (countries or regions).

The majority of the conducted research confirms the Oswald hypothesis on the micro level. Nickell (1997, 1998) was among the first. Green and Hendershott (2001) also confirmed it, albeit with some limitations for the United States. In contrast, Flatau et al. (2002) found only a weak confirmation of the hypothesis on the basis of Australian data. In Germany, Lerbs (2010) was able to confirm the hypothesis on the basis of panel data, however, achieved the opposite result when utilizing cross-sectional data. Laamanen (2013) confirmed the Oswald hypothesis in a controlled experiment in Finland. Finally, Oswald himself officially confirmed his hypothesis almost twenty years after first proposing it (Blanchflower and Oswald 2013).

However, the results are disputable on the level of individuals and households. Against expectations, Coulson and Fisher (2002) or Munch, Rosholm and Svarer (2006) for example, convincingly show that home owners achieve better results on the labour market than tenants. The question remains therefore: How is it possible that the relationship is positive on the micro level, but the reverse when aggregated to the macro level. The solution to this “puzzle” requires a closer look.

Another reason why this topic deserves the attention of economists is the political impact of government subsidies for home owners. In 2009, government subsidies for home ownership were CZK 13.3 billion (€ 502.9 million) (Řežábek 2011, p. 39). There may be some positive externalities pertaining to home ownership (see e.g. Glaeser and Shapiro 2002) which may be grounds for the government to justifying subsidizing homeowners. This topic requires further research. It is important to note, that further evidence that home ownership disturbs the labour market might serve as a strong counterargument to government subsidies for home ownership and might lead to a better use of public funds.

In the Czech Republic, this phenomenon was first analysed, to a certain degree, by Lux and Sunega (2011). They found that home ownership may have an influence on migration planning. The Oswald hypothesis itself was tested on a regional level by Konečný and Stroukal (2015) and on an individual level by Stroukal and Šťastný (2015).

This paper is a continuation of the research on the individual level and seeks to answer the causal relationship between individual unemployment and home ownership over time.

Theories and hypotheses

The labour market and housing market are connected through a number of factors, especially migration. The reason why regional unemployment is higher in regions with a higher home ownership rate was explained by Oswald (1996). One of the most discussed reasons is the lower mobility of home owners (Isebaert 2013). At a regional

level, the home ownership market can be more rigid than the labour market (De Graff, Van Leuvensteijn and Van Ewijk 2009). This means that because of the transaction costs connected to buying or renting real estate, it is difficult to move from regions with high unemployment to regions with lower unemployment. An interesting and little researched hypothesis is the influence of the NIMBY (Not In My Backyard) effect (Fishel 2001). Fishel argues that in areas with a higher rate of home ownership, the owners are more likely to be against new industrial buildings and entrepreneurial projects which could bring job opportunities on the one hand, whilst on the other hand, they could reduce other, especially non-monetary, benefits from living in the particular location. Oswald also discusses the possibility that home owners are more likely to go to work by car, thereby causing traffic jams, which adds to employee costs and therefore results in increases in unemployment. Farber (2012) shows that the business cycle may also have an influence on the issue, although this could not be confirmed on the basis of data for the United States because the economic crisis hit all states in the same way.

At an individual level it is assumed that home owners are less likely to be unemployed and that this relationship will also show over time, but only over the predictable short-term. A person is more likely to become a home owner if they have job certainty. Banks and mortgage companies even require proof that the debtor will be able to repay their loan i.e. that in most cases they are employed. Over the short-term, the effect is assumed to be positive and that the transition to home ownership is connected to the lower probability of unemployment in the following year. However, over the long-term, the effect of migration materializes and people are less likely to move house, even after losing their job. The difference between the short-term and long-term should therefore be observable.

If an economically active person, or a person in a joint household with them, becomes a home owner, the probability that they will be unemployed in the future increases. In the first year, this effect will be the opposite, but it will gradually begin to change in the following years. Due to the fact that only sufficient data is available to confirm the change within one year, the hypothesis is formulated as follows:

H1: In the first year after the transition to home ownership, the probability of the owner being unemployed will be lower.

The reverse relationship is also discussed, i.e. from unemployment to home ownership. Even the relationship between the change in employment status to the change in home ownership status should be in accordance with the H1 hypothesis. If a person becomes unemployed, it is more likely that they will not buy a home – irrespective of the fact that they have their own money to do so. At that point in time, the purchase would have a higher opportunity cost due the risk of lower long-term income or, which is probably more often the case, for the reason that they were denied a mortgage because of being unemployed, which contravenes the stable income requirements of banks. On this basis, we can formulate the second hypothesis as follows:

H2: The probability that an economically active person, or a person in a joint household with them, becomes a future home owner is smaller for the recently unemployed. This effect will be immediately evident in the following year, as opposed to H1.

Stroukal and Štastný (2015) confirm the substantial differences in the relationship between unemployment and home ownership in separate estimates for men and for women. Although according to Hoffman and Averett (2010), the long-term positions of men and women in the labour market equalize, there are a number of studies which show that substantial differences still exist. For the purposes of this research it is assumed that the relationship between unemployment and home ownership will be weaker for men. In other words, women will be more prone to unemployment after the transition to home ownership. In a joint household, it is more likely for women to be unemployed if the man has a job. In contrast, men will find it easier to change jobs even when their wife is employed. In other words, the household is more likely to move if the man loses his job than if the wife loses hers. The reason for this is not purely the patriarchal relationships (Goldberg 1999), it is also in part due to the different preferences of men and women - men demonstrably prefer having a career more than women, whilst women prefer family more than men do (Brožová and Stroukal 2015). Felmler (1995) discusses more differences. On this basis, we can formulate the third hypothesis as follows:

H3: The probability that a home owner will be unemployed in the first year after their transition to home ownership will be lower for men than for women.

Models

A binary probit model was used to confirm or refute the aforementioned hypotheses. It was formed in a standard form

$$P(Y_i = 1|X_i) = \Phi(X_i'\beta),$$

where Y represents the zero-one variable, P probability, X the vector of independent variables, and Φ the cumulative distribution function for normal distribution.

To confirm the H1 hypothesis, it was appropriate to use differences to find whether the change from rental housing to home ownership led to a change in employment. On the basis of the expectation that the process is not immediate, and in order to approach causation, the variable tracking of the status of home ownership was lagged by one year. The model was subsequently cleared of the variables that influence unemployment in order to achieve the closest possible estimate of the influence of home ownership. The dependent variable *New_Unemployed* was equal to 1 if the respondent lost their job in a given year as opposed to the previous year. For these purposes, the estimated model can be presented in this form:

$$P(\text{New_Unemployed}_i = 1|x) = \beta_0 + \beta_1 \text{New_Homeowner_lag_} + \beta_2 \text{Age 17-40}_i + \beta_3 \log(\text{HH net income PP})_i + \beta_4 \text{Education upper secondary}_i + \beta_5 \text{Education post secondary}_i + \beta_6 \text{Education tertiary}_i + \beta_7 \text{Children} + \beta_8 \text{Married} + \text{time control variables} + \text{geography control variables} + u_i$$

The H2 hypothesis also required confirmation. This time, however, the dependent variable was *New_Homeowner*, $s = 1$ for those respondents who became home owners in a given year. The estimated model can therefore be presented as follows:

$$P(\text{New_Homeowner}_i = 1|x) = \beta_0 + \beta_1 \text{New_Unemployed_lag_} + \beta_2 \text{Age 61_more}_i + \beta_3 \log(\text{HH net income PP})_i + \beta_4 \text{Education upper secondary}_i + \beta_5 \text{Married}_i + \beta_6 \text{Good health}_i + \beta_7 \text{Bad health} + \text{time control variables} + \text{geography control variables} + u_i$$

In order to confirm the H3 hypothesis, all the models were estimated separately for men and for women.

Data

The three aforementioned hypotheses were confirmed or refuted using data sourced from Eurostat research in “European Union Statistics on Income and Living Conditions.” This data contains individual representative data for the Czech Republic for the period 2008 – 2011. It represent the largest and best-quality research that could be used to confirm or refute the hypotheses.

The data contains 7,106 observations where the observed unit is an economically active resident of the Czech Republic. Only those respondents who answered that they were employed (or self-employed) or unemployed were considered economically active. Of the total 15,636 observations, retired respondents (25.3% of observations) and other economically inactive respondents (29.2%), mainly children and students, were discarded.

For the purposes of this paper, and in contrast to the referenced research herein, the observed unit is an economically active resident, not a household or income unit. In the past, this approach was only taken by Van Leuvensteijn and Koning (2004), Stroukal and Šťastný (2015), and a few others. In spite of this fact, it is a logical choice because when using income units or households, unemployment would be particularly biased against those earning less, of whom it was assumed women would be prevalent. Furthermore, it was considered probable that the differences between men and women and their mutual interaction in households might have a large influence on the explanation of the Oswald paradox between the regional and individual levels.

A home owner was defined as = 1 if they responded in the questionnaire that they were the direct owner of the real estate they lived in or lived in a joint household with the owner. Real estate covered by a mortgage was considered as ownership. For both genders, just over 80% are owners. However, in reality there are fewer owners because those who live in a household with the owner fall under our definition.

8.7% of women and 6.7% of men were unemployed, making the total 7.6%.

The other variables had averages that were in line with expectations. The average age in dataset, irrespective of gender, was approximately 42 years, whereby women were of a slightly higher age. 73% of women and 77% of men had a secondary education, and 17% of women and 16% of men a tertiary education. Approximately 60% of respondents were married. Most of the respondents considered their health to be good, however women felt more often that their health was worse than that of the men.

The data is summarized in the following table:

Table 1 - Descriptive statistics - average values

Variable	Population (n=7104)	Women (n=3163)	Men (n=3941)
Unemployed	0.07592 (0.2508)	0.0873 (0.2771)	0.0665 (0.2266)
Homeowner	0.8147 (0.3713)	0.8129 (0.3716)	0.8163 (0.3712)
Age	42.1756 (12.1199)	42.4679 (11.0832)	41.9344 (12.8721)
Education upper secondary	0.7517 (0.4270)	0.7259 (0.4390)	0.7731 (0.4165)
Education post-secondary	0.0136 (0.1262)	0.0187 (0.1408)	0.0094 (0.1130)
Education tertiary	0.1642 (0.3614)	0.1690 (0.3616)	0.1604 (0.3612)
Married	0.6034 (0.4788)	0.6013 (0.4777)	0.6050 (0.4797)
Children	0.5479 (0.4977)	0.60544 (0.4888)	0.5016 (0.5001)
HH net income PP	11846 (7049)	11869 (7441)	11828 (6720)

standard errors in brackets

Results and discussion

The models introduced above were estimated using the available data. The results of the first two models, which confirm the H1 and H3 hypotheses, are presented in Table 2. Using robust standard errors did not change any of the conclusions. Due to the number of covariate patterns in the Pearson goodness of fit tests for both models being close to the number of observations, the Hosmer–Lemeshow test with 10 groups was used, the results of which indicate that the model fits the data well (p-values 0.2911 and 0.3435).

Table 2 – The influence of home ownership on unemployment

Dependent variable – Unemployment (Newly unemployed = 1)				
Independent variable	Model 1	Marginal effects	Model 2	Marginal effects
	(Women) <i>Probit</i>		(Men) <i>Probit</i>	
Constant	0.9950 (1.6292)		0.5333*** (0.1604)	
New homeowner t-1	-0.2835 (0.3661)	-0.0184	-0.6349* (0.3712)	-0.0754
Age 17-40	0.7617*** (0.1908)	0.0494	0.1789 (0.1774)	0.0210
HH net income PP (log)	-0.5584** (0.1952)	-0.0362	-0.9697*** (0.2008)	-0.0114
Education upper secondary	0.3388 (0.2300)	0.0220	0.4381* (0.2369)	0.0514
Education post-secondary	1.2162* (0.5541)	0.0788	0.3172 (0.8437)	0.0372
Education tertiary	-0.0063 (0.3531)	-0.0004	-0.1426 (0.3719)	-0.0167
Children	0.5279** (0.1914)	0.0342	-0.1537 (0.2062)	-0.0180
Married	-0.2413 (0.1851)	-0.0158	-0.8321*** (0.2173)	-0.0976
Time variables	Yes		Yes	
Geographic variables	Yes		Yes	
McFR ²	0.1213		0.1422	

n = 3163 (model 1), 3941 (model 2)

McFR² is the McFadden determination coefficient

standard errors in brackets

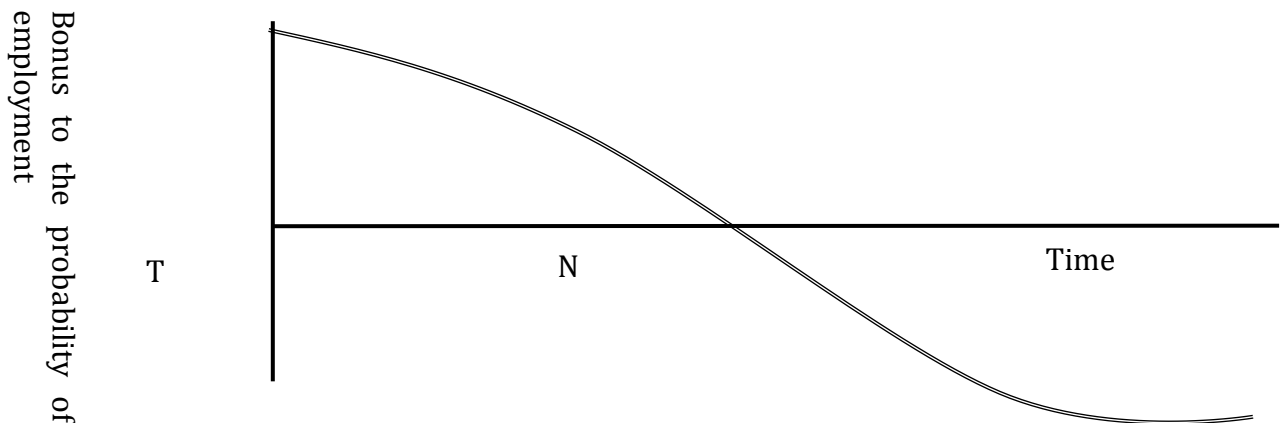
* p < 0.10; ** p < 0.05; *** p < 0.01

The results confirm the H1 and H3 hypotheses. The results show that for men, the transition to home ownership in a given year reduces the probability that the respondent will be unemployed by 8 percent. No such effect was observed in women, in accordance with expectations.

The other variables mostly followed the expected direction of influence. Higher age, higher income, higher education, for men marital status, and for women childlessness, correlated with a lower probability of transitioning to unemployment.

On the basis of the above, a hypothesis can be put forward that states that those people who are more certain about the future of their jobs become home owners and that their forecast of future employment strongly correlates with reality. However, to confirm this hypothesis it would be necessary to gather new data on whether respondents expect to be unemployed over a given time horizon. Baert, Heylen and Isebaert (2014) gave an insight into this when they suggested that people with mortgages have shorter unemployment periods than direct home owners. They explain this by saying that the mortgage commitment motivates people to search for a new job more intensively.

A problem that could not be solved with the available data was the short time horizon. It is possible to assume that the transition to home ownership will at first have a positive relationship with employment. However, as time goes by it can be similarly assumed that higher migration costs and a reduced ability to forecast future employment will prevail in the years ahead and that the transition to home ownership will be affected negatively. On this basis, another hypothesis can be put forward for future research, namely, that the relationship between unemployment and home ownership on an individual level varies over time: the bonus to the probability that the respondent will not lose their job decreases over time to the point of becoming a bonus to the probability that they will lose their job and will not find a new one in the given year. Over a longer time horizon, it would be possible to estimate the average year when this break happens. Oswald himself in his last piece of work encourages researches to look for this (Blanchflower and Oswald 2013).

Graph 1 – Bonus to the probability of employment over time

The hypothetical relationship is illustrated in the graph above. A person becomes a home owner over time T . In this paper, it was confirmed that such a person would benefit from an increased probability of employment in the following year, compared to the rest of the population. On the basis of the confirmed existence of the migration effect, that is home owners migrate less to jobs (Lux and Sunega 2011), it can be assumed that it will prevail over time when the "mortgage effect", i.e. the higher probability of employment in the years following a house purchase, decreases. In time $T+N$, the migration effect prevails and the bonus becomes a penalty to the probability of employment. It would be interesting to confirm this hypothesis, but there is insufficient data available for the Czech Republic. Of similar interest would be an international or inter-regional comparison of N .

It is clear that the "mortgage effect" is not caused by the real estate purchase itself; the particular person would have the same job certainty even if they had not bought the real estate. However, it demonstrates an effect that at this point in time cannot be measured on the basis of the data that is currently available. If it were feasible to introduce such a variable into the model so as to measure the expected probability of employment (either subjectively asked or objectively measured), the graph above, on the basis of the set hypothesis, could be redrawn with only negative values because the migration effect would work in isolation (and other negative relationships described above).

This research also confirmed the relationship between a lagged change in employment and a change in home ownership. The results are shown in Table 3.

Table 3 – The influence of employment on home ownership

Dependent variable– Home ownership (difference)				
Independent variable	Model 3	Marginal effects	Model 4	Marginal effects
	(Women) <i>Probit</i>		(Men) <i>Probit</i>	
Constant	-0.3364** (0.1547)		-0.6098** (0.1933)	
Newly unemployed t-1	0.2892 (0.3231)	0.0509	-0.4416 (0.4225)	-0.1132
Age 61+	-0.2390* (0.0912)	-0.0420	-0.2278 (0.2220)	-0.0584
HH net income PP (log)	0.0777 (0.1673)	0.0137	0.3080 (0.1936)	0.0790
Education upper secondary	0.2093* (0.0910)	0.0368	0.2708 (0.2243)	0.0694
Married	-0.3426** (0.1543)	-0.0603	-0.2207 (0.1799)	-0.0566
Good Health	0.0189 (0.1746)	0.0033	0.6327** (0.3210)	0.1622
Bad Health	0.1762 (0.2134)	0.0310	-0.9983*** (0.3543)	-0.2559
Time variables	Yes		Yes	
Geographic variables	Yes		Yes	
McFR ²	0.0825		0.0914	

n = 3163 (model 3), 3941 (model 4)

McFR² is the McFadden determination coefficient

standard errors in brackets

* p < 0.10; ** p < 0.05; *** p < 0.01

In contrast to the first models, the results here do not confirm the hypothesis. The transition to unemployment in one year does not have an influence on the probability that the respondent will become a home owner. The influence was not found for either men or women. The results suggest that the influence is stronger for men and that the direction is in line with expectations, but the estimate is statistically not significant.

The results for the other variables are, like for the previous models, in accordance with expectations. Women, less educated women, married women and men in poorer health are less likely to become home owners.

The results are especially interesting with regards to the arguments in favour of the state's housing policy. The Czech state receives four to five times less revenue from property taxes compared to the OECD average (Vítek and Pavel 2004). As a result, it is highly probable that a debate will take place in the future about either the implementation of new taxes for home ownership or an increase in current tax rates (Stephens 2011), although it is widely recognized that this will be politically difficult to enact (O'Sullivan and Gibb 2012). Such taxes should increase the cost of home ownership and thus decrease the regional rate of home ownership, which would in turn reduce regional unemployment. On the other hand, as Konečný and Stroukal (2015) found, the policy briefs to support home ownership lack any discussion on the support's effects on unemployment.

Conclusion

The Oswald hypothesis is one of the most studied hypotheses in current research into the functioning of the labour market. Current available data seemingly confirms the hypothesis with ease. However, a deeper analysis of a number of various economies on a regional and on an individual level, raises new questions and the need for the formulation of additional hypotheses. This paper focused on one of those and answered the question to what extent the relationship between a change in home ownership or unemployment has on an individual level in the Czech Republic one year after a change in one of these variables.

Our first and main hypothesis was that a transition to home ownership decreases the probability of unemployment for the respondent in the following year. After estimating large panel data, the hypothesis was found to hold true for men, but not for women. It is the opinion of the authors that the explanation should not be sought in a direct causal relationship, but rather in the "mortgage effect", i.e. a person is more likely to become a home owner if they have job certainty. On an individual level, the reason for this is the fear that they may not be able to repay the mortgage, or alternatively, because the mortgage provider requires some assurances on their employment. On this basis, a new hypothesis was introduced. The hypothesis states that the relationship between home ownership and unemployment on an individual level changes over time when the probability of unemployment transitions from low to high. The reason for this is at first the "mortgage effect", which is later outweighed by the migration effect. To confirm this, it would be appropriate to use a longer time series and differentiate new home owners with a mortgage from those new home owners without a mortgage.

The second hypothesis was refuted. The expectation was that a transition to unemployment would negatively influence the possibility of transitioning to home

ownership in the following year. However, this relationship was refuted for men and women alike.

The third hypothesis assumed that there would be a significant difference between men and women. This was duly confirmed. The first hypothesis held true for men and not for women. This paper proves that it is appropriate to analyse the Oswald hypothesis for women and men separately.

The logic behind the Oswald hypothesis stems from the spatial nature of both the labour and housing markets. Selling a home is expensive, as is the cost of moving in cases where an individual loses their job. People also face coordination problems where a household consist of more persons. The inflexibility of rental prices, the NIMBY effect, and job-worker mismatches are among the other important reasons. Although all of these are described in literature, this work present important findings about the relationship between the rate of unemployment and the rate of home ownership over time, as well as about the significant differences between men and women. It is also one of the first works to describe the relationship in the Czech Republic.

The Oswald hypothesis requires further detailed research across other countries. The housing market makes an important contribution to GDP, forms an important part of household expenses, and is sensitive to inflation and the business cycle, which in turn has an influence on the labour market. A good understanding of the mechanisms between the housing market and the labour market would provide an impetus for better economic policies, in particular the withdrawal of existing policies or the prevention of the introduction of new ones only aimed at reducing unemployment.

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Authority in Education – Free Association with Authoritativeness?

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Abstract

The current vision of authority goes significantly beyond that of the traditional one and is being viewed within new contexts, which take into account the social status of the individual, their freedom and self-realization, and their capability to manage complicated social relations and challenging life situations. In addition, emphasis is placed on the individual and their social responsibility, self-control, inner discipline, volitional effort and other personal characteristics. The theme of authority is currently topical not only in education but also in broader social contexts, and not only in the Czech Republic. This study has a theoretical character. It explains the etymology of the term authority, compares this term with the substance of authoritativeness, analyses in brief T.W. Adorno's theory of Authoritarian Personality, characterizes differences in parenting styles, and in particular the specifics of the authoritative and authoritarian styles.

Keywords: authority of the schoolteacher, parental authority, authoritarian personality, freedom, duty, value, discipline, responsibility, parental styles, authority of schools as an institution, family, social role

Introduction

Some contemporary theoretical considerations and polemics about the procedures in education frequently have one thing in common – and that is a diversely motivated but sometimes very intensive – attack on authority. However, the irony is that for this purpose its own (for this purpose intentionally overexposed) armamentarium is used. After all, the proverbial “fight fire with fire”, as maintained by the scientific world, can be used when emotions prevail at all costs and even then over empirically substantiated arguments. What therefore happens during explosive scientific disputes is that everything is driven under the wings of authority, which raises the impression in excited heads of an unduly limiting system. So when the bath water is thrown out, the terms obedience, directive, discipline, lack of freedom, and regime are anathematized together

with that of authority. Even if this is forgotten, be it either conditionally or for the long term, pejorative associations are attributed to the rule of authority. This happens in particular on the grounds of the fact that authority is usually understood to be the practical manipulative activity of persons or institutions that misuse the entrusted authority, rather than admitting that authority is the basis for observing rules.

It is of course difficult to estimate to what extent the mentioned widespread image of authority reflects the *association of authority with authoritativeness*. The closeness of the verbal association of both terms is surprising for teachers, practitioners and pedagogical theoreticians alike. The tendency to understand studies about authority as studies about authoritativeness still persists to this day. The degree of misunderstanding serves as an example of the fact of how closely both terms are associated in the minds of educators, parents and teachers.

The secrecy of scapegoats?

From an analysis, for the purposes of this text, of sources which are related to Authoritarian Personality (T.W. Adorno and team), it is evident that the concept of authority (in the form used under the majority of social sciences) differs from authoritativeness (Adorno 1950). The team of authors focused their research especially on ethnocentric, anti-Semitic, and fascist prejudices and stances. The team conducted extensive research into prejudices in order to determine to what degree the hostility shown to one ethnic group or another “out-group” (not their own) is an indicator of the hostility that would be shown towards ethnic minorities and other foreign groups. They first put forward a scale for the measurement of prejudices against Jews, the so-called anti-Semitic scale (A-S). They subsequently proposed a scale for ethnocentrism (so-called E-scale) to measure stances towards black people, other minorities and patriotism (based on the contradiction between America and other nations). The team discovered the internal homogeneity that existed in these structures and the association between ethnocentrism and anti-Semitism. They finally developed a scale of fascism (so-called F-scale) for measuring personal depth tendencies, including for example, excessive submission to authority, uncritical preference of their own group’s values, antipathy towards perceiving other groups from the psychological point of view, unwillingness to seek one’s own hidden motives and conflicts, tendencies to see foreign and dangerous forces outside one’s own world, etc. Adorno’s team empirically proved that those people who scored high on the A-S scale also scored high on the E- and F-scales. They therefore deduced that a complex of stances towards other groups is seemingly part of a person’s broader personal structure. They classified this as “authoritativeness, an authoritarian person” (Výrost et al. 1997, p. 60). It is evident that the issues surrounding that of authoritarian persons exceeds the limits of the understanding under social sciences and also social psychology itself with regards to terms such as anti-democratic, fascist or totalitarian. In many ways this theme has now moved into the sphere of pedagogy, both at theoretical level and in educational practice (Novotný 1997).

How can an authoritarian person be characterized? In order to describe an authoritarian personality it is necessary to use a psychoanalytical relational framework. An authoritarian personality is characterized by a rigid system of stances as a consequence of a strict upbringing during childhood, during the course of which all manifestations of aggression and hostility towards the parents were suppressed. An authoritarian personality is characterized by subjection and obedience. This expresses itself in the person playing the role of “scapegoat” with regards to their superiors, whilst treating those who are considered as “inferior” with contempt and aggression. An authoritarian personality holds prejudices towards many other groups. Such personality traits tend to originate in a domestic environment characterized by strict moralistic discipline. This means that such people view society and its social groups hierarchically and therefore lay excessive emphasis on socioeconomic status. Due to their strict upbringing during childhood they are obedient towards those who hold authority and wield power. The hidden aggressiveness, of which they are often unaware or is suppressed, is transferred to weaker objects (inferior persons, different minority groups, etc.) through the sublimation mechanism. It has also been revealed that an authoritarian personality often possesses two-dimensional thinking, hating ambiguousness and contradiction. This rigidity also manifests itself in interpersonal relations: where preference is given to situations with clearly determined social limits and status, and whereby personal closeness hinders them.

Authoritativeness has become a term that has pervaded from scientific language into everyday speech. In everyday speech the fact that an authoritarian is usually the one who fails to be an authority is intuitive. Investigations into how a charismatic personality is formed and that of a person who becomes a role model of success for others, in this or in other spheres of human activity, confirm that authority cannot be formed, but that it is a part of a person’s natural qualities and requires some virtues, in the sense of having a disposition to do good or abilities that win recognition. A certain “vivisection” of the internal disposition of the authoritarian personality can therefore help us to understand what authority absolutely should not represent in order to achieve full acknowledgement. An authoritarian is affected by a loss of willpower, suffers from feelings of desolation and lonesomeness that need to be permanently compensated. At the same time, activities and suggestions put forward to them by a person not subordinated to them are experienced as a threat and a way that could deprive them of their own initiative. An authoritarian person who constructs unconquerable walls in their immediate surroundings, does not do it for reasons of protecting themselves against the deceptions of everyday life. On the contrary, they do it because they are completely absorbed in their own project. They are also not meticulous, but worried by details driven by their obsession with an extensive or remote dream; in so doing they disregard their immediate family and show contempt for everyday life. Their feelings also range from being the greatest to being too small; worrying profusely what their surroundings think of their unpredictable behaviour. There is evidently a difference between an authoritarian and vigorous use of legitimate power. The first invokes aversion in people. What are then the roots of

authoritativeness? And, from where do the destructive attacks on us in the contemporary world originate? The answer can be found (as in the majority of complicatedly structured social rebuses) in the basic model, in the initial molecule of every society – in the family.

Parents moving between styles of child care

If a comparison were to be made with the world of architecture and engineering, it would be evident that the detail of every part of the design of the project would be more or less derived from the original sketch. The same is valid for the process of bringing up and educating a human being. The most interesting theories are not applied as long as they collide with the everyday development of the preconditions, talent and abilities of the child in the family. Parental care is – and it is assumed always will be – the most significant environment for the metamorphosis of a “blank sheet” or a “jungle child” into a sociable person. It is therefore understandable that this care is under permanent investigation and classification. Within this context, one of the most useful models (Maccoby and Martin 1983) with regards to the correlation of parental care with authority cannot be ignored. This model was developed on the basis of normal, not-harming parental care and focuses on the two principal dimensions of parental behaviour (Čáp 1993; Arendtová 1994; Fontana 1997; Vališová 1997; Goleman 1997).

The first dimension is based on the contrast of care in terms of: insisting – commanding; as opposed to: not insisting – not commanding. The second dimension is based on the contrast of care in terms of: receiving – responding – child-oriented; as opposed to care in terms of: refusing – not responding – parent-oriented. These two dimensions are mutually combined and offer four different models of childcare behaviour (see Table1).

Table 1. Styles of childcare

Style of childcare	Receiving Responding Child-oriented	Refusing Not responding Parent-oriented
Insisting, Commanding	AUTHORITATIVE	AUTHORITARIAN
Not insisting, Not commanding	BENEVOLENT	NEGLECTING

Source: Maccoby and Martin, 1983.

Manners of parental behaviour, connected with these styles of childcare and the corresponding manners of child behaviour are briefly characterized below.

Parental styles and their consequences

Authoritative:

Under this parental style, children are required to reasonably behave and socially interact at a level appropriate to their age and abilities. This style is characterized by warmth, care, and the interest of parents in the opinions and feelings of their child(ren).

Parental decisions are explained to the children. The behaviour of the child is subsequently independent, self-asserting, cooperative towards the parents, with a friendly disposition towards other children of the same age, contented, performance oriented, and successful.

Authoritarian:

Under this parental style power is asserted without warmth and mutual communication. It sets absolute demands, requires obedience and respect for authority, and is driven by tradition and hard work. Due to this style the behaviour of the child tends towards social isolation. It misses spontaneity. Girls are taught to be dependent and lack any endeavour to perform well. Boys tend to be aggressive towards other children of the same age.

Benevolent:

Under this parental style not much is required from children. It is characterized as receiving, responding and children-oriented. The behaviour of the child is characterized by prevailing positivity and lively emotional harmony. However, their behaviour is also viewed as immature, whereby the children lack the ability to handle their impulses, lack adequate skills in terms of social responsibility and are not self-sufficient, with a tendency towards being aggressive.

Neglecting:

Under this parental style, parents are too engrossed in their own activities. They take inadequate part in the life of their children and exhibit little interest in what they are engaged in. Parents shun mutual communication and rarely take notice of the child's opinions or feelings. The behaviour of the child tends towards moodiness and a lack of concentration. The child is profligate and does not handle its emotions and impulses well. They also show little interest in school, whereby truancy is frequent and the risk exists that they will be exposed to the dangers of addiction.

Some parents of course can change their style of childcare. This usually occurs under the influence of external factors, and is dependent on the momentary perceptiveness of their relationship with their children and on their own mood and emotional lability. Many parents are ambivalent to this and their care bears the attributes of several of the above described styles. This ambivalence applies to the children's behaviour too, their individual temperament and abilities thereby generating unique deviations from the above described behavioural responses. Nevertheless, the aforementioned model provides a precious practical guideline for the investigation and application of parental care models and the typical behavioural responses of children. Parent – child interactions requires communication in both directions because the behaviours of both parties are the subject of mutual influence. The existence of harmony between both parties is in large part also conditioned by the perception of the parents of the individual needs of the child. These needs can be diverse, ranging from rich physical activity up to the accentuated need for privacy or special claims to emotional security.

Ping-pong war about authority in schools

Some alternative schools reject authority entirely. This is in contrast to the accepted philosophy, a symbol of military discipline, that adults wield unlimited power over children on the mere grounds of their age. In rejecting authority, the most dogmatic claim that is made is that students have the same fund of knowledge as adults. Such an approach denies the demands of society, its minor social units, and those of the individual. It denies the existence of a society's cultural and technical heritage and the importance thereof today. Analogously it also denies the fact that experience provides skills, knowledge and wisdom that can be handed down to others. This therefore makes a Robinson Crusoe out of every child, one who begins always and entirely anew, whilst surrounded with potential companions and teachers.

Similar problems exist, although to a lesser degree, when a school gives students the right to define and recast its moral code. In an attempt to take highly intelligent, bright young people seriously, the adults easily give up any responsibility for the definition of educational goals and the handing on of information. The impulsivity of students, who are given absolute freedom of action, can result in never ending discussions and the recasting of goals as a response to every minor suggestion. This can subsequently result in students working towards the almost total elimination of formal teaching within the classroom or even the whole school framework.

A formal form of impersonal teaching, one that does not comply with the interests of students, hardly awakens the trust of students in schools as an institution, let alone contributes to the authority of teachers. When the basic value of the academic education is repeatedly questioned, teachers must therefore turn to other forms of power assertion than are not linked to the authority of an institution or subject. Teachers have no other choice but to use their personal influence in their pedagogical work in order to convince students to cooperate with them in the process of academic cognition. The activation of such forms of power assertion naturally lures the teacher away from the given task and exhausts their psychical strengths before the commencement of the teaching activity itself.

In a school with a rigid curriculum and discipline this can gradually result in the so-called ping-pong response, whereby misunderstandings arise from the experiences and findings that many active and enthusiastic teachers register. Under such circumstances, even if it is necessary to have educational goals, the conception and realization of which must take into account student participation and their ability to fulfil them, the adult must retain responsibility for the determination of the principal educational orientation.

It is not only their right but also their duty to remind students (where necessary, strictly) of their responsibility to exert at least a certain form and degree of proper intellectual and volitional endeavour. By choosing this form they will occasionally have to submit to the wisdom of their superiors. In doing so, it saves valuable time and psychical energy, particularly when the students take seriously the contention of the

adult that certain school subjects will be of benefit to them later (be it either for their general or professional development).

Consideration must therefore be given to the pedagogical finding that the value of the teaching style or strategy cannot be assessed without taking into account the nature of the students and the character of the school subject. Unless the children or students accept the assigned educational goal, the simple insistence on this goal only becomes a weak method of persuasion. Under these conditions, the teacher must first bring out the desire of the students to learn and arouse their interest. It is only then that further aspects come into play. If the subject of the study relates to the acquisition of critical or creative skills, the teacher can enable the students to set goals and helpful strategies. However, when the subject of the study has a clear structure which has to be acquired as a tool, then the teacher has a greater chance to succeed by choosing an incorporative procedure and stick to the given approaches developed by experts.

The principal problem of selecting a pedagogical strategy is therefore not only a question of a general decision about the complexity of the structure or the amount of freedom, but also about the basic skills and hand on information required in comparison with general skills and the need to discover. The principal point is more likely to be determined by whether the students believe in the value of the knowledge they acquire. It is therefore necessary to choose methods that support this belief prior to the achievement of such a goal. As soon as the students experience aspirations or understand the necessity of learning, it is important that they themselves create sufficient capacity to handle the structure (code, system) and freedom, and also learn to participate in the common tradition.

Conclusion

Authority is present in all areas of life. It determines and influences the relations between family members, partners, in schools and workplaces, as well as within the framework of leisure time activities. In such differing environments, equating authority with authoritativeness constantly causes misunderstandings. Seeking a consistent and understandable code and discovering functional partner relations will continue under family and school conditions as long as there is mutual respect for the rights and duties of both adults and children alike. However, these efforts should not affect the exclusion of authority.

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Conference Review

Science Week Project 2016 Samara State University of Economics

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IV International Science-Innovative Forum “The Week of Science at the Samara State University of Economics” took place at the Samara State University between 25 April and 29 April 2016. The Week of Science was opened by the university rector, Gabibull Chasajev. To begin with, rector Chasajev heartily welcomed all the present guests and encouraged cooperation between the local and foreign universities. Scientists from different academic institutions took the floor at the plenary session.

Aleksushin Vladimirovich Gleb (Samara State University of Economics, Russia) in his lecture “Samara region as part of the global tourism area” focused on assessing the situation of the tourism in Samara region. To begin with, the author mentioned two methods for assessing tourism: the common method (assessing past-present) and the innovative method (assessing future-present). He spoke about two main competitors – Nizhny Novgorod and Kazan. He also devised a complex structure of the tourism clusters (nature, holiday centres, cultural and tourist attractions etc.) and presented the image of tourism in Samara. Furthermore, he carried out SWOT analysis of tourism in Samara region. Firstly, he mentioned “strong points” of the region – location on the river Volha; the area around Volha is perfect for hiking, edifices, leisure time activities, genuine Russian beer and space rocket construction. The “weak points”, to which the author refers as “threats”, include a shortage of direct flights, poor infrastructure and transport. On the other hand, the area provides ample opportunities to seize such as growing demand for waterways and the increasing interest in space tourism. At the end of the lecture, the author set the main goals and worked out viable strategies of the tourism development in Samara region.

Oleg Borisovich Aleksandrov (Moscow State Institute of International Relations of the Ministry of Foreign Affairs of Russia) in his article “The Regions in Russian Foreign Policy and European Integration Processes” drew the attention to the regional politics of

the European Union and European Integration Processes Offices. He pointed out sound reasons for strengthening the position of the regions in politics (the effort to save the cultural peculiarity) and introduced an overall concept of European regions. Furthermore, he came up with an idea of a complex interaction between the regions and mentioned regionalism and separatism of European countries. Referendums in Scotland and South Tyrol, together with separatism in Spain, were taken as examples. The author concluded his speech with the assessment of the Regional Policy of the EU and informed the audience on EU funding. The German model and its characteristics together with the Russian federative model were given as representative examples.

Jorma Korhonen (University of Applied Sciences of Savonia, Finland) in his article "The Economic Impact of Tourist Events in the Region of Northern Savonia" explored the issue of the economic impact on tourism in the Region of Northern Savonia. A close attention was directed at the concrete result of two in-depth researches. The first was based on asking locals for the public opinion on tourism, social cultural impact and the impact of tourism on economy. The second research was conducted to public opinion poll of tourists within four touristy events (Ice Marathon, Taco MTB, Finnish Orienteering Championships and Dance Festival in Kupio). In addition, the research assessed prevailing opinions and attitudes of the tourists to the expenses for their leisure time. At the end of the article, the author mentioned that the demand for tourism is on the increase in the region of Northern Savonia and observed that the region is visited mostly by middle-aged people or people from the higher social strata.

Anabela Mesquita (Accountancy University of Porto, Portugal) in her article "Prospects for the Development of Massive Open Courses" referred to long-term prospects for the development of open courses on mobility. She expressed a strong need of internationalization and mobility. The professor provoked thought of internationalization not happening in the same place and at the same pace in all institutions and countries. The main goal was to stimulate the development in knowledge, the level of education, specialist training and teachers' mobility. The author also commented on the internationalization process at the University in Portugal. She pointed out the significant dates: 2004 – the beginning of internationalization including the setting-up of the Department of International Cooperation; 2008 – programmes for international students in English; 2011 – dissemination of the culture of the international students; students help other students; 2015 – cooperation with Brazil. At the end of the article, the author turned the attention to the developed international programmes and projects.

Marek Vochozka (the rector of the Institute of Technology and Business in České Budějovice, Czech Republic) in his article "Small and Medium-sized Enterprises as a Determining Factor of the National Economy" gave attention to small and medium-sized enterprises in CZ and EU. The enterprises encourage the economic growth in many effective ways such as creating jobs, competitive environment and innovation in economy. The author also provided the definition of this group of enterprises. He

evaluated their shares in the total number of enterprises, their shares in creating added value, national products, posts etc. In addition, the author presented surprising findings about micro-enterprises (up to 10 employees) being more flexible than small enterprises (up to 50 employees). The micro-enterprises are able to satisfy the customers' needs in a better way and thus they benefit from gaps in the market.

Iveta Kmecová (Department of Faculty of Corporate Strategy, KM ITB in České Budějovice, Czech Republic) in her article "Analysis of Managerial Methods and Techniques" explored the fundamental issue of employing managerial methods and techniques. The lecture was aimed at the characteristics of selected managerial methods (objective-based management, Scorecard management, management with the assistance of motivation, time management) and techniques (brainstorming, controlling and coaching). The assiduous attention was paid to tangible results of the research geared to assessing managerial methods and techniques used by Gurmed enterprise located in Veselí nad Lužnicí in South Bohemian Region. The in-depth research indicated that managers find the managerial methods and techniques highly useful for the efficient management of their employees.

At the plenary meeting, Julien Demonso (University of Bordeaux, France) and Dmitry Ovodenko Vladimirovich (Samara Regional National Resource Centre) delivered lectures entitled "International Financial Problems of the Development of Enterprise" and "The Agency for Strategic Initiatives: Looking to the Future" respectively.

At the conference in Samara, our programme also included informal meetings and candid discussions about mutual cooperation in publication activities, joint projects and exchange internships of the academics between the Samara University and ITB in České Budějovice.

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Review

STELLNER, František, Radek SOBĚHART, Pavel SZOBI, Marek VOCHOZKA, Marek VOKOUN. Vývoj českého vysokého ekonomického školství v letech 1945-1953 [The development of the Czech higher economics education in the years 1945-1953], 2015. Praha: Setoutbooks.cz. ISBN 978-80-86277-80-6.

Irena Kozmanová

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This publication by the interdisciplinary team of authors connected to František Stellner, and which consists of historians and economists alike, monitors the development of Czech higher economics education in 1945–1953. This publication is mostly substantiated on the basis of unpublished sources from the internal operations of the relevant universities in Prague, on published policy papers and study materials and on the published memoirs of contemporary witnesses or on memoirs that were documented specifically for research purposes. This publication is to be seen as a product of the current increased interest in historiographical research into Czech (Czechoslovak) tertiary education in the crucial period of change after 1945 and 1948. Simultaneously, it is also a reflection of the efforts to critically reflect on the ideological and institutional foundations of Czech tertiary education today.

The first three chapters pursue the chronological evaluation of the institutional and personnel developments of key universities and the state's policies in connection with these institutions. The first internal milestone in the period 1945–1953 was a political one, the 1948 Czechoslovak coup d'état. The second milestone (1951) was chosen in connection with the researched topic – the authors see the period starting in 1951 as being characterized by fundamental personnel changes (the elimination of Rudolf Slánský and of the structures he implemented in the functioning of universities) and later structural changes (closing down of universities, fundamental reorganization, new legislative norms, a stronger role for the ministry). The authors define 1953, the year ending the observed period, as a period characterized by the establishment of more stable structures and the clarification of the competences of the individual players in

tertiary education policy. In the same year, (among others) the University of Economics in Prague was established. In the field of economics education, the inception of this institution represents a certain symbolic milestone that ended the period of instability and of constant reorganizational changes that was typical of the post-war period.

The authors' particular interest lies in the evolution of the institutional structures of the relevant universities, the staffing policies of these institutions, their continuity and discontinuity. The authors show the openness of the system after 1945, which permitted unconventional academic career progress to some. On the basis of personnel data, they demonstrate the different notions of the individual players with regards to the functioning of the tertiary education system in the period 1945–1948. On the basis of specific steps taken against academicians, students and even universities, the authors document how, during political power interventions, the loopholes in the existing rules were exploited or how completely new rules were implemented. Over all, the authors present the tertiary economics education and its structures in the observed time period as being determined by mostly non-scientific, political factors.

The second part of this publication is a case study on the two significant institutional players in tertiary economics education whose inception is considered to mark the start of a relatively stable period after 1952/53, namely the University of Economics in Prague and the Faculty of Economics and Engineering of the Czech Technical University in Prague (FEE CTU).

The authors analyse the personnel developments at the University of Economics in Prague; they present short prosopographical studies of the key representatives, they observe their career paths, their publication and pedagogical activities, they monitor the habilitation and professorial procedures and also the experiments with new forms of study and scientific qualifications (research assistantship); they pay attention to the personnel structure, to the discussions on the internal organization and the necessity for the individual study subjects and to the (dis)continuity of the period under scrutiny with respect to both the pre-war period and the period after 1948. Even from this perspective, like in the introduction, the authors observe on the one hand the significant openness of the system and the possibility to “speed-up” careers, which stemmed from the high and urgent demand for a qualified labour force, and on the other hand, the decisive influence and dominance of political factors over expert factors when forming academic careers. According to the authors, the University of Economics in Prague can be seen (even in terms of the personnel factor) as the successor to the strongly ideologically oriented University of Political and Economic Sciences in Prague (UPES), which according to the authors explains the lower grade of political and methodological opposition from pedagogues. The authors reject the argument that the University of Economics in Prague could be seen as the successor to the University of Business CTU.

On the basis of a study of the FEE CTU (1952–1960), the authors present an experiment with a new form of curriculum for tertiary economics education, the so-called engineer-economics field inspired by the Soviet model. An analysis of the discussions at that time

about the need for such a specialization, or to the contrary, the more academic education represented by the universities, offers crucial data on the question asked at the beginning of this publication: What kind of economics was taught in the observed period, or rather, what kind should have been taught according to the players involved?

The concluding “Appendix” describes the tertiary education system in the Czech Republic today and the role of economics education within it. The integration of this into this publication should be considered as an attempt to highlight the similarities of a number of structural problems in the present and in the time period observed in the historical part of this publication. It can also be seen as a useful “intentionally created source” for future historians who in the next half-century will be evaluating the development of Czech tertiary economics education in 2016.

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Review

SCHELLE, Karel, Jaromír TAUCHEN, Karolina ADAMOVÁ, Antonín LOJEK. Velké dějiny zemí Koruny české. Tematická řada. Stát. [The Great History of the Lands of the Bohemian Crown. Thematic series. State.], 2015. Praha: Paseka. ISBN 978-80-7432-652-3.

František Stellner

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The latest volume in the thematic series of books entitled “The Great History of the Lands of the Bohemian Crown” was published in 2015. The book was published under the supervision of the leading expert on the history of law, the experienced author of many handbooks and encyclopaedias, an associate professor at the Faculty of Law of Masaryk University and the former Rector of the Karel Engliš College in Brno, Karel Schelle. One of his co-authors is his student, an expert on German legal history and on the legal history of the protectorate, an assistant at the Department of the History of the State and Law of the Faculty of Law of Masaryk University, Jaromír Tauchen. Schelle and Tauchen are an experienced writing duo who contributed to the reviewed synthesis of the “The State after 1848”. Together, they recently wrote publications entitled “The Development of Constitutionalism in the Czech Lands” and “The Role of Constitutional Law in the Relationship between the Czech State and the Holy Roman Empire in the Middle Ages and its Consequences for Subsequent Development”. They are currently working on an extensive and demanding project, notably the editing of the “Encyclopaedia of Czech Legal History”. Another member of the team of authors is the head of the Legal Department of the Faculty of Law at the University of West Bohemia in Pilsen, Professor Karolina Adamová, whose focus is not only on the history of law but also on political science as well. She, together with her colleague, from the Faculty of Law at the University of West Bohemia in Pilsen, Antonín Lojka, wrote the chapters about State developments until 1848. The complete team of authors is committed to writing another volume in this thematic series of books, which will explore the legal history of the lands of the Bohemian Crown.

The synthesis entitled “The State” summarizes the development of constitutional law issues within both the historical and political contexts. The first part describes the development of the Czech state from its earliest stages until the revolution of 1848-1849, from the medieval to the modern state in all its forms: the medieval concept, the estates of the realm, and absolutism. The second part focuses on the modern state that came into existence after 1848 and on the development of civil society. The analysis is divided into three parts each covering one period of time: the Austro-Hungarian Empire, inter-war Czechoslovakia, and the Communist dictatorship. A detailed commentary for the period up to 1992 is included.

The book consists of 650 pages and it is in the form of an expert monograph with a scientific apparatus including notes, a name index and an extensive list of used sources. Unfortunately, this list of sources is not divided into those that are of a personal nature, institutional, or taken from expert literature. The authors followed their previous studies and relied on current Czech legal and political science historians. Internationally, they followed the works of Austrian and German historians, such as D. Brandes, T. Olechowski and H. Rumpler. The publication is accompanied by good quality graphical materials; readers will appreciate the colourful pictures about the development of the State coat of arms.

The book offers fundamental information about the development of Czech state history; it focuses on theory and also on explaining the fundamental termini and primarily describes the development of state institutions. One of the highlights of the book is the explanation of the constitutional developments from the 19th century until the present day. The synthesis of state history is an excellent extension of the series “The Great History of the Lands of the Bohemian Crown”, which is without a doubt of the highest quality and one of the most remarkable Czech editorial acts of the turn of the 20th and 21st centuries.

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