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**“BORN TO BE REAL, NOT TO BE PERFECT!”  
CHILDREN’S RIGHTS IN RELATION TO EDUCATION**

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**Abstract**

Regardless of time and space, family and financial background, color of skin and gender, “normal” or “special”, each child has the right to education. This paper discusses how children with other skills are involved in mainstream education in Albania. It highlights how the process of inclusiveness is incorporated in public schools and how human factor facilitates or aggravates this process. And the role of teachers, young people, children and families in decisions about themselves. The effects of Albanian culture on attitudes towards special needs. The different perspectives (theoretical and practical) that Albania has on the concept of inclusion is also astonishing. The quality of special education is debated as well. If it is true that special education is helping to create success in schools, then clearly there is a need to urge changes to create “comfort zones and people” and discover more about what factors may influence the expected success. Theoretical framework of the paper is based on Albanian legislation about inclusion, its history of education and their implementation in practice. Methodology of investigation and data gathering uses questionnaires and conversations on specific questions in relation to special support. The description of the Albanian special instructional environment indicates that inclusion is connected to the social elements of gaining knowledge of as the right to participate. The Albanian state wants to guarantee the same instructional possibility to all residents and this aim is partly reached via early intervention in the form of unique education with fairly knowledgeable professionals. Albania wants to assure similar study opportunities to all, so that no one is excluded. Special disorders should not be considered as a disease, but as a challenge to accept differences

**Key words:** special education, inclusive program, curriculum and strategies.

## **1. Introduction**

### *Background and Aim*

Education in Albania, particularly the special education system and inclusion, is based on well designed laws. Specific aspects of the education system, in general, are written and implemented having as a focus the special needs student and improvements of the teaching and learning processes. However, it is quite clear that in order to understand in depth the facilities and difficulties in implementation, the perspective must be broadened and social culture within which inclusiveness exists must be considered. This paper discusses the role of special education in Albania. There are several different viewpoints on how special education is understood in our country. The different perspective that Albania has on the concept of

inclusion is also striking. The written laws and official documents gathered from schools, which have incorporated the process of inclusion, show that the Albanian school is performing well. However, school support is offered when it is needed by going through some bureaucratic process<sup>1</sup>. An effective teacher education program is also a key element in creating a successful school system. Here, the quality of special education is debated: despite Albanian strong focus on inclusion, our schools have a poor performance and educational results in this direction, at least in the towns of Vlora, Fier and Lushnje (regions where research took place). Well, if it is true that special education is helping to create successful stories in schools, then obviously there is a need to know more about the other and different systems and to highlight what factors may influence that success. Italy and Greece are our close geographical and political neighbours, there exist clear differences in the educational area between Albania and them.

Since the programme of Inclusion began to be implemented in Albania in 2012<sup>2</sup>, the number of laws supporting and protecting the education of children with other skills has increased; a growth in the number of students with ASD attending mainstream public schools has resulted in the employment of a higher number of supportive teachers. The town of Vlora is at the top for the employment of supportive teachers. The provision of special education in public schools is increasing in number but not always in quality. Although there are more than 400 supportive teachers employed, a great number of these performers does not hold a degree in special education, rather in other fields of study, such as mathematics, foreign languages, biology, etc.,. The purpose for this is to employ teachers who were part of the system of education but for some reasons they do not have their working load in the schools they were working in. And this is the first obstacle to prevent students with ASD, their families and schools to meet their expectations. Other obstacles, to be discussed later on, are the historical, cultural factors and social understanding that explain the different approaches to inclusiveness in schools.

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## 2. The Role of Inclusiveness in Schools

The provision of special education into the mainstream public schools in Albania is explained in terms of percentage of the students served, the process of identifying the students, the development of individual programs, the stage of schooling at which services are concentrated (primary and secondary school), and the content of the ASD into public schools curriculum<sup>3</sup>.

### 2.1. Percentage of Students Served by Special Education

The percentage of students receiving some kind of special education in Albania has increased in recent years.

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<sup>1</sup> Marjatta Takala and Rune Sarromaa Hausstätter “Effects of History and Culture on Attitudes toward Special Education: A Comparison of Finland and Norway” International Scholarly Research Notices Volume 2012 |Article ID 161039 | 7 pages | <https://doi.org/10.5402/2012/161039>

<sup>2</sup> Pika 3, Neni 65, Organizimi i arsimimit të fëmijëve me aftësi të kufizuara, Legjislacioni i Republikës së Shqipërisë.

<sup>3</sup> UNICEF, E Drejta e Fëmijëve me Aftësi të Kufizuara për Arsimim: Një Qasje e Bazuar tek të Drejtat për Arsimim Gjithëpërfshirës (The Right of Children with Disabilities to Education: A Rights-Based Approach to Inclusive Education), Zyra Rajonale e UNICEF-it për Evropën Qendrore dhe Lindore dhe Komonuellthin e Shteteve të Pavarura (EQLKSHP), 2011

Number of school-aged students in Albania	2012	2014	2016	2019
Total	10	98	254	400

**Table 1 Number of students in special education in Albania.**

The data in Table 1 is for full-time special education, from elementary to secondary grades, public schools, in Albania. This support is given to students who can benefit from mainstream schools and in such cases the support teacher has to design an individual education plan based on the abilities and knowledge of students who are identified as having learning difficulties<sup>4</sup>.

However, special education reform is felt mostly in the towns where it is mostly being implemented; remote areas of Albania do not offer such services, or at least there are quite a few schools, and the different ways of defining children with special needs are a cultural difference between towns and villages, educated and uneducated people.

## 2.2. Inclusiveness in education and Procedure of Identification

In the last 15 years, the number of children with autism spectrum issues has grown so hastily that it is turning into a health crisis.

The rapid boom in the quantity of youngsters with these problems, year after year, has made Albanian Health System unprepared to offer guide services for his or her rehabilitation. Experts say the diagnosis has improved, however this ought to be accompanied by using intervention therapy.

“We used to speak approximately 1 in 150 children, and now we talk about 1 in 59 children. This year we think of the numbers 1 to 40 ”.

In Albania, the evaluation process is not based on the academic performance of the child but by the multidisciplinary staff (parents have to get their children evaluated by a group of doctors, and then by a group of psychologists), only after that, children are appointed special teachers to follow them at school. The teachers in collaboration with the parents develop a personal educational program for the pupils. This is a formal document, which is updated every year and it is subdivided in trimester.

The number of students receiving special support in public Albanian schools increases steadily during the school years. The use and distribution of special education in schools is a problem from a full-inclusion perspective<sup>5</sup>. Turning to the strategies of creating an inclusive school, and the cultural differences in Albania.

An important aspect of the Albanian concept of inclusion is the “right to learn.” This right is provided in one way<sup>6</sup>: by placing students in mainstream education with a special support so

<sup>4</sup> Strategjia Kombëtare e Arsimit Parauniversitar 2009-2013, fq. 32.

<sup>5</sup> WHO/World Bank, Raporti botëror mbi aftësitë e kufizuara (World Report on Disability), Gjenevë, 2011.

<sup>6</sup> MAS. “Strategjia Kombëtare e Arsimit Parauniversitar 2008-2013. (2004)

that they can learn in that environment and by providing integrated education, which guarantees the right of every student to learn.

In Albania, there are no special classes in public schools. The students are placed in regular classes for the purpose of narrowing the gap between good and not so good performers.

For the last ten years, Albanian government has emphasized integration and inclusion as important goals for schooling<sup>7</sup>. Hence, special support is used very much in Albanian compulsory schools. This process was supported by multidisciplinary groups of professionals that claimed academic results would be higher among students in integrated settings than among those in segregated settings<sup>8</sup>.

The use of special education in relation to inclusion emphasizes the necessity to look into a broader social understanding of the role of special education in Albania.

### 3. Teacher Education

A great challenge for the government, besides setting up services for these children, is their inclusion in education. The process of inclusiveness and special support in compulsory schools in Albania began almost ten years ago.

“Children with autism have their place in the education system, in kindergartens or schools. The coming decade is likely to receive increased attention, most likely in adolescence. Mankind knows little about how to deal with these teens very specifically, or early growth, or adults.<sup>9</sup>”

Albania
Special support since 2012 for individuals with particular needs.
Special support for reading, writing and speech difficulties since 2005.
Special education teachers graduated in 2010.
Inclusiveness and equality ideology have increased since then.
Schools receive no additional money per pupil with a special teacher.

**Table 2. The historical development of the school system and inclusiveness.**

In addition, the cultural attitudes toward special teachers differ between the two groups: special teacher and general teacher. The teaching profession is respected in Albania where the prerequisite for becoming a regular classroom teacher has been a Master’s degree since 2010.

<sup>7</sup> Ligji Nr. 69/2012, Për Arsimin Para-universitar. Pg. 28

[https://resourcecentre.savethechildren.net/node/8188/pdf/inclusive\\_education\\_in\\_albania\\_in\\_albanian.pdf](https://resourcecentre.savethechildren.net/node/8188/pdf/inclusive_education_in_albania_in_albanian.pdf)

<sup>8</sup> Strategjia Kombëtare e Arsimit Parauniversitar 2009-2013

<sup>9</sup> Plani i Integruar i Ministrisë së Arsimit, 2010



The usual way to become a special education teacher in compulsory school in Albania is first to obtain a Bachelor's degree, a Master's in education and then acquire non payable work experience for one years. Thereafter it is possible to enter the official examination to obtain a teaching license.

## **4. Discussion**

### **4.1. Cultural Explanations for Differences in Special Education**

In this section, we focus on elements from the history of Albania and the variation of educational environments that could have an effect at the different strategies to special training support in public schools

### **4.2. Historical Aspects of Education**

The focus on education in Albania was strong long before inclusiveness became an established term in the legal framework. The importance of education was stressed by the political government, which pointed out that a small nation has no resources other than human ones. Given its political attitudes and the existence of dictatorship for almost 50 years, Albania has always invested in education and considered it as one of the important keys to the nation's success and education has also had the role of building a national identity.

The rapid development of Albanian culture after 1990 helped many people to change in a rapid way their economic education status. More and more people started to attend universities and graduate in Albania or abroad. The changes affected the performance of schools and students as well. Education was not as before, control became weaker and the overall students' performance decreased. The education system entered a period of transition. Only, in the last decade, researchers and politicians, in general, have a clear idea that there is a strong connection between education and success at work and thereby with the success of the nation as a whole. Many laws and policies are designed to make education strong again. Among these, we can mention the process of inclusion as the right to be equal and the right to participate and the right to learn. This indicates the homogeneous nature of education throughout Albania, thus our education system is aiming at equal opportunities<sup>10</sup>.

Reviewing the role of special support in compulsory schools, it is obvious that this support is a great help for those students that perform below average. Therefore, inclusiveness is an important part of the educational system in order to help individuals to learn and to improve their general performance. As a result, according to the law from 2012, this support is aimed to be given more and more in regular public educational schools<sup>11</sup>.

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<sup>10</sup> Zela Koka, MA. Valentina Haxhiymeri, Dr. Marita Nika Flagler, Fatmir Bezati "Efektiviteti i zbatimit të kuadrit ligjor që garanton edukimin e fëmijëve me aftësi të kufizuara në kushtet e arsimit gjithëpërfshirës". Raport Studimor. Fondacioni Shqiptar për të Drejtat e Personave me Aftësi të Kufizuara, me mbështetjen dhe në Bashkëpunim me Save the Children Albania, Tiranë, Mars 2005.

<sup>11</sup> Schulze, Marianne, Raporti përfundimtar: Promovimi i të drejtave të aftësisë së kufizuar në Shqipëri (Promoting Disability Rights in Albania, 2011)

The idea of inclusiveness is incorporated in most of Albanian school system: the idea of social democratic development of school. Thus, the main change seen in the Albanian system over the last 10 years has been a greater emphasis on inclusive education<sup>12</sup>.

### 4.3. Various Educational Environments and Problematic Issues

In Albania, there is a significant difference in understanding inclusion. Looking again at the situation of the educational system, it is apparent that the strong ideology of “the right to be equal and the right to participate and the right to learn” is part of the political goal of education only on paper<sup>13</sup>. Research shows that there is an obvious distance between inclusiveness as theory and the current practice. Although, on paper, huge changes appear in the statistics for this category, the reality is slightly different.

One of the major drawbacks of all of this process is that the **support teacher is not always graduated in special education**. All the teachers (graduated in English, Maths, Geography, etc.) can become special teachers. The reason for that is, for as long as they are part of the education system in Albania and do not have full working load in their schools, the state has the obligation to provide them opportunities within the teaching system. Hence, parents face formal differences in approaching this serious issue. In Albania, not all general teachers of public schools are trained about special education. Special teachers are the only in the focus of training<sup>14</sup> about inclusiveness and various problematic areas and possible solutions to them. And only in the last decade the special education profile is opened as a branch at various universities.

**The legal framework** lacks to determine the role of a special teacher in the evaluation process of the special student. And, it lacks to define duties and responsibilities of the general teacher in relation to that of the special teacher as well.

**State or school do not offer training for regular teachers and/or parents.** Training is offered only to special teachers and the parents of special pupils are not involved in the process. The success in school of these categories depends a lot on the strategic teaching techniques and materials used in various classes, on the ability of the regular and special teachers to offer a “specialised” teaching environment.

Schools that have incorporated inclusion do not provide an effective **psychological support** for students with special needs. There is only one psychologist for three different schools. Thus, a psychologist has to be at two schools only two days and one day in the third school

There is **not**, in most of the schools, **a special environment for pupils** to stay in when they experience difficult emotional states. No special equipment to relieve stress or to support physical disabilities or to improve the teaching and learning process.

<sup>12</sup> Plani i Integruar i Ministrisë së Arsimit, 2010 pg. 38

[https://resourcecentre.savethechildren.net/node/8188/pdf/inclusive\\_education\\_in\\_albania\\_in\\_albanian.pdf](https://resourcecentre.savethechildren.net/node/8188/pdf/inclusive_education_in_albania_in_albanian.pdf)

<sup>13</sup> Romi, Sh & Leyser, Y 2006, ‘Exploring inclusion pre-service training needs: a study of variables associated with attitudes and self-efficacy beliefs’, *European Journal of Special Needs Education*, Vol.21, No 1, February 2006, pp.85-105

<sup>14</sup> Komisioni Evropian, DG-Arsimi dhe Kultura(2010): Përmirësimi i Cilësisë së Mësuesve: Axbenda e BE-së. Dokument i përgatitur nga Holdsworth, P., ku jepet një përmbledhje e prioriteteve për përmirësimin e arsimit të mësuesve, sipas përkufizimit të Ministrave të Arsimit, në Konkluzionet e Këshillit, nëntor 2007, 2008 dhe 2009.

**Large classes** are another drawback of this process. For teachers (general and special) it is quite difficult to manage various situations that may raise loud noise (some special students suffer from loud noise) or it is impossible to divide large classes into smaller groups without affecting the teaching process.

**Cultural attitude** is another huge obstacle when it comes to inclusion for implementation in practice: teachers' attitudes toward inclusion can be of particular importance. Attitudes are related to the culture of inclusiveness<sup>15</sup>. Positive attitudes of teachers can create a positive culture while negative attitudes can hinder implementation of inclusion even in the best possible conditions and environments. Teachers involved in this study had different attitudes about inclusion ranging from overly positive - where teachers believed that inclusion had a good impact on all children and the community in general - and up to extremely negative attitudes - where teachers believed that inclusion of the special student worsened the situation for teachers themselves, other children, and parents themselves<sup>16</sup>. The point made is that, when labeled differently, needs and expected outcomes can also be considered differently, and not always in good.

However, **individual motivation and positive attitudes** toward inclusion are not constantly available to teachers in Albania<sup>17</sup>. The teachers indicate that although they were trained in the inclusion of special children they again had reluctant attitudes towards the. Contributing factors in these attitudes they can be individual but also social.

Many interviewed parents have admitted that in addition to the support they feel from individuals who conscientiously welcome and assist their child, there are many other who "indirectly" show rejection, humiliation, discrimination and marginalization. Today we still have parents who take their children away when they notice children with unusual behaviors and when they find out that he has autism. But we also have those parents who are reluctant to promote their child's altruistic behaviors by helping them integrate with children with difficulties. Today we have school principals and / or teachers who brutally refuse to integrate a child with autism into kindergartens or schools, although the law clearly defines inclusive education, but we also have those principals and teachers who are willing to welcome children with autism, and thus greatly alleviating parenting burdens. It is they who also encourage teachers to welcome children with disabilities. There are teachers who humiliate, neglect, and physically and /or verbally abuse autistic children in their classroom, thus depriving the child of a better opportunity and openly expressing a distorted model of education to other children. And there are the teachers, professional, intuitive, intelligent and humane who do have children with difficulties, with autism, in their classes and this does not stop them in their mission to advance the education and development of the child. These teachers may not realize how much gratitude and happiness they have brought into their parents' hearts. Thus inclusiveness in education is vital step and now is high time to be going beyond itself in violation of the law on the rights of these children.

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<sup>15</sup> Opdal, L. R., Wormns, S., & Habayeb, A. (2001). Teachers' opinions about inclusion: A pilot study in a Palestinian context. *International Journal of Disability, Development and Education*, 48 (2), 143-162.

<sup>16</sup> Bustos, R., Lartec, J. De Guzman, A.J., Casiano, C., Carpio, D. and Tongyofen, H.S. (2012). Integration of Inclusive Education Subject in the Curriculum of Pre-service Teachers towards Transformation: Exploring its Impact and Effectiveness. The Asian Conference on Education 2012 Official Conference Proceedings 2012

<sup>17</sup> Walker, T. J. (2012). "Attitudes and Inclusion: An Examination of Teachers' Toward Including Students with Disabilities". *Dissertations. Paper 401*. Chicago, Illinois, USA. [http://ecommons.luc.edu/luc\\_diss/401/](http://ecommons.luc.edu/luc_diss/401/)

While the number of children with other developmental disabilities has remained constant over the last decade, according to the nonprofit organization Families for Early Autism Treatment, the amount of children with autism in K-12 schools around the Albanian State has increased by more a lot in recent years. This means educators are dealing with unique student issues that they may not have seen in years past and responding to problems they may not yet have had experience with. Following are some examples of the challenges that K-12 students with autism face:

### **Fear of change**

ASD students perform well when they participate in routine and repetitive activities. However, if that routine deviates, these students may have problems adapting, which can lead to behavioral, academic or mood problems. In fact, even being confronted with the possibility of change can be anxiety-inducing for these children.

### **Focus**

Children with autism may have problems focusing during class, which can result in them not being able to remember what was taught during school lessons. In addition, this tendency makes it hard for these students to concentrate on assignments and study for tests.

### **Language**

“Language is more difficult for children with autism to process. During early grammar school years, instruction is often visual. However, as children get older, lectures are more common,” says Jessica Leichtweisz, founder and CEO of Hope Education Services and speaker and author in the field of autism. “This type of instruction is not well suited to children with autism, who often have a difficult time understanding the information presented. For this reason, as children with autism get older, it can be far more difficult for them to keep up.”

### **Motor skills**

Autistic children have challenges with motor skills, which can make it tough for them to do well with handwriting exercises because they may have problems holding a pencil. In addition, these students can have problems participating in physical education activities because of their reduced motor abilities.

### **Sensory perception**

“Children with autism spectrum disorder may also struggle with an overwhelming amount of sensory input at any given time while in the classroom setting. Something as simple as students talking too loudly or an overly decorated classroom can make it difficult for a child with ASD to adequately learn in the classroom setting,” says April J. Lisbon, a family coach and empowerment speaker, who has worked in K-12 public education for 18 years as a school psychologist. “When a child with ASD becomes sensory overloaded, they may become more anxious in nature. Subtle stimulating behaviors — such as excessive feet tapping or jerking head movements — may become evident as the child attempts to control his or her environment.”

### **Social skills**

Children with autism tend to prefer doing activities by themselves, which makes them isolated and reduces the opportunities to interact with other students. In many cases, teachers will allow

these students to pursue the solo activities they prefer, but that comes at a price: ASD students are not able to learn the social etiquette and rules with which their non-autistic counterparts are quite familiar. This can cause autistic students to become outcasts among their peers and targets for bullying.

Being part of this democratic development, schools in Albania have mainly worked to create schools for all, in which everyone has the same opportunities. Unfortunately, this goal has not led to the creation of well-designed platforms about the role of special teacher at a regular class in relation to regular teacher and the grading system for special students. In Albania, the confusional situation of how to grade these students is a continuous confrontational issue among regular teachers, special teachers and the parents.

## 5. Conclusion

The description of the Albanian special instructional environment indicates that:

- inclusion is connected to the social elements of gaining knowledge of as the right to participate.
- The Albanian state wants to guarantee the same instructional possibility to all residents and this aim is partly reached via early intervention in the form of unique education with fairly knowledgeable professionals.
- Albania wants to assure similar study opportunities to all, so that no one is excluded.
- Special disorders should not be considered as a disease, but as a challenge.

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## SETTING THE GROUND FOR GREEN BOND RESEARCH: INSIGHTS FROM A BIBLIOMETRIC ANALYSIS

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### Abstract

A recent introduction of green bonds, strong growth of this market and the increasing academic interest that followed require a systematic assessment of the first decade of green bond research. The aim of the paper is to gain bibliometric insights about the development and intellectual structure of this specific research domain. Science mapping of the Web of Science indexed publications, including citation analysis, co-citation analysis and bibliographical coupling, revealed: (1) the interdisciplinary nature of the field and subject categories covered (business finance, environmental sciences, green sustainable science technology, economics, environmental studies); (2) who are the most-cited topic-specific authors (*Mathews; Siswanto; Kidney*) and journals (*Journal of Cleaner Production; Energy Policy*); (3) which sources are the most relevant for framing green bond research (*Energy Policy; Journal of Banking & Finance; Journal of Cleaner Production; Journal of Business Ethics*); and (4) emerging themes and ongoing developments (the green bond market, the institutional and regulatory perspective of green bonds, the green bond risk-return profile, investors' pro-environmental preferences).

**Keywords**—green bonds, climate bonds, bibliometric analysis, systematic review, Web of Science

### 1. Introduction

The rising environmental pressures have motivated the development of innovative financial instruments. **Debt capital markets are increasingly used for funding climate solutions and there is a growing interest for green bonds.** This relatively new asset class is used for financing investments with environmental or climate-related benefits (Ehlers and Packer, 2017) and is gaining prominence in sustainable development finance frameworks (Tolliver *et al.*, 2019).

Although still very small compared to the global bond market, with a share of less than 1.6% of global debt issuance in 2016, the green bond market has seen strong growth in recent years (see e.g. Ehlers and Packer, 2017; CBI, 2019a). The important and promising area of green bonds has been gaining attention among researchers as well, focusing on the characteristics and challenges of these bonds (Institute for Climate Economics, 2016; Flaherty *et al.*, 2017; Zerbib, 2019, etc.).

Despite the increasing number of related studies, with many of them presenting interesting literature reviews (e.g. Flaherty *et al.*, 2017; Hachenberg and Schiereck, 2018; Baulkaran, 2019), no emphasis has yet been put on a development and structure of this research field, resulting in a lack of its clarity and systematic approach. While science mapping has been increasingly used for mapping the structure and development of scientific fields and disciplines (Zupic and Cater, 2015), in the field of finance research bibliometric studies are still rather scarce. Our goal is to map this research enthusiasm on green bonds and to systematise the research field. The purpose of the paper is to map the intellectual structure of the green bond research field, as well as to suggest how the field might move forward. Therefore, the population of scientific papers addressing green bonds was analysed using a bibliometric method. The presented method (including citation analysis, co-citation analysis and bibliographic coupling) offers numerous benefits to gain new insights into a specific research area and results in an objective assessment of the major contributions to a field of research over time (e.g. mapping the field, as well as explicating future developments).

Our contribution to the literature is three-fold. First, we contribute to the emerging research field of sustainable and responsible investment (SRI), with green bonds falling under this umbrella term. Second, we also contribute to the literature by mapping the green bond research field, gaining useful insights into its structure and development, and recognizing its dominant research points. Third, the methodology approach taken in our study brings novelty in this research field, in which, to the best of our knowledge, such an approach has not been used up to now, and it brings an overview from a new, wide-angle perspective.

## 2. An overview of the theory and practice on green bonds

### 2.1 Defining green bonds

*Green bonds*, also referred to as *climate bonds*, are broadly defined as fixed-income securities issued in order to raise finance for a project which contributes to a low carbon, climate-resilient economy (Kaminker and Stewart, 2012). A definition proposed recently by the EU Technical Expert Group on Sustainable Finance (2019) is that an EU Green Bond could be any type of listed or unlisted bond or capital market debt instrument issued by a European or international issuer that is aligned with the EU Green Bond Standard. Some sources (e.g. Siswantoro and Syakhroza, 2018) differentiate between *green bonds* and *climate bonds*, in that climate bonds are certified by an independent reviewer, while green bonds are not.

Related terms, but not synonyms, of *social bonds* and *sustainability/SDG bonds* (the acronym referring to the UN Sustainable Development Goals) fall under the same umbrella term of SRI, but differ in their focus, i.e., positive social outcomes (ICMA, 2019a) and a combination of both green and social outcomes, respectively (ICMA, 2019b). Furthermore, the green bond concept has inspired more of innovative financing. For example, *blue bonds* are a debt instrument used for raising capital to finance marine and ocean-based projects that have positive environmental, economic and climate benefits (World Bank, 2019).

Green bonds have the same standard financial characteristics of any other regular bond – a face value, yield, maturity date, and issuer (Artecona *et al.*, 2017). They differ from regular bonds in that they are labeled as “green” by the bond’s issuer (eventually, also by the second independent party) and this label entails a commitment from the issuer to use the proceeds of the bond to finance or re-finance climate-sensitive projects (see e.g. Artecona *et al.*, 2017). Therefore, one of the basic defining features of green bonds is the utilization of the proceeds,



which supports verifiable projects that are intended to alleviate climate or environmental impact (Hackenberg and Schiereck, 2018; Baulkaran, 2019). Flaherty *et al.* (2016) note that the time horizon here should presumably be much longer than of traditional, or non-climate-related, bonds, because it does not seem to be sufficient to delay the repayment of bonds 5 to 10 years, as the climate benefits of investment will not be realized in such a short time period. Kaminker and Stewart (2012) describe three categories of green bonds: government-backed bonds, asset-backed bonds, and covered bonds.

## 2.2 The green bond market

These alternative financial instruments are attractive to investors as a straightforward instrument to integrate environmental, social, and governance (ESG) outcomes into fixed income portfolios. The range of investors is diverse – from mainstream institutional investors, and specialized ESG and responsible investors, to corporate treasuries, sovereign and municipal governments, and retail investors. Green bonds can be issued by governments and municipalities, multinational banks, or private business (CBI, 2018b). As bond financing is a tool available to only a set of countries, in the case of smaller economies with less developed domestic capital markets and limited access to international capital markets, the role of regional and multilateral banks as issuers of green bonds is of vital importance in providing direct financing (see e.g. Artecona *et al.*, 2017). These bonds are often issued for infrastructure projects when raising large investment is necessary (Flaherty *et al.*, 2016).

The green bond market is a relatively young market, introduced in 2007 when the European Investment Bank issued the first green bond. At the same time, the concept of green bonds was developed by a group of Swedish investors, pension funds and investors focused on SRI, together with Skandinaviska Enskilda Banken and the World Bank (Hackenberg and Schiereck, 2018). The product was designed to respond to specific investor demand for a triple-A rated fixed income product that supports projects that address the climate challenge (World Bank, 2019). During the next years, a number of multilateral development banks and other financial institutions issued green bonds, with the first green bond brought to market by corporate institutions in 2013 (Hackenberg and Schiereck, 2018). Greater interest in green-financing and the growth of the market has attracted other investors such as private companies, foundations, development banks, and international institutions (Artecona *et al.*, 2017).

Since 2014, according to the Climate Bonds Initiative (2019a; 2019c), the total global issuance volume of the green bond market has increased approximately by 4.5 times. Total issuance volume in 2018 amounted to USD 167.6bn, in which 320 issuers from 44 countries from all continents have taken part. In the first half of 2019, the issuance volume amounted to USD 117.8bn. Cumulative issuance at the global level from its inception in 2007 to the latest available annual data, for 2018, amounts to USD 521bn. The largest regional market is Europe, with USD 190bn of issuance since 2007, holding more than one third of the global cumulative green bond issuance. At the country-level, the USA is leading (USD 118.6bn), followed by China (USD 77.5bn) and France (USD 56.7bn). The outlook for 2019 and beyond is an expected growth in green bonds from financial institutions, sovereigns, certified climate bonds and climate-aligned issuers (entities which generate at least 75% of their revenues from green business lines).

However, in spite of its growth, the green bond market comes across several challenges that will determine its further development. Bogacheva and Smorodinov (2017) have clearly

systematized the crucial ones: 1) absence of common definition of green finance and lack of international standards; 2) insufficient correlation of targets of sustainable growth with priorities of national investment policy; 3) absence of regulatory and legal framework directly related to green finance; 4) ecological externalities; 5) maturity mismatch; 6) poor green project selection and management; 7) information asymmetry at the capital markets; 8) lack of analytical tools and expertise in identification and assessment of green projects' risks. Many of these issues have been brought into a discussion by both professionals and researchers.

### **2.3 Green bond research**

The introduction of green bonds and the development of the market has been followed by an increasing research interest for the idea of capital markets contributing to the fight against the climate change. Green bonds fall within a broader research field on corporate social responsibility (CSR) and sustainable and responsible investment (SRI). Crucial issues include the investment requirements that make SRI different from conventional investment and these refer to ESG requirements.

Green bonds have grown in popularity among researchers especially in the last several years. Similarly to the approach to CSR and SRI, a significant part of the green bond literature is focused on its financial aspect, specifically, on its risk-return profile and pricing (Baker et al., 2018; Hackenberg and Schiereck, 2018; Zerbib, 2018; etc.). A comparison of the green bond with conventional bond and other financial markets has been a research focus of some papers (e.g. Gianfrate and Peri, 2019; Hyun et al., 2019; Partridge, 2020). A significant number of studies also analyse the development of the green bond market and identify its drivers and impediments (e.g. Voica et al., 2015; Ng and Tao, 2016; Tolliver et al., 2020). Some studies (e.g. Park, 2018; Gatti and Florio, 2018; Huang and Yue, 2019) have recognised the importance of regulatory aspects in green bond finance and investigate the role of disposable international guidelines and second-party opinion. Several authors take a wider perspective, and analyse issues of sharing the financial burden of transition to a green economy intertemporally (Flaherty et al., 2017) and interregionally (Bowen et al., 2017).

The abovementioned research topics will be analysed by applying a bibliometric analysis, and as a literature review on green bonds is the theme of this study, it will be analysed in detail in the following section. We will present a systematical and thorough structure and development of this research field. We will take a new perspective and use a bibliometric approach to study literature for its content, utilization of data, representation of a theme, and growth over time.

## **3. Procedure: Data collection and methods**

### **3.1 Bibliometric mapping technique**

The current study is retrospective in nature and uses a bibliometric analysis of secondary data. This type of analysis generates useful information for researchers evaluating scientific activity (Rey-Martí *et al.*, 2016). For instance, it can be used to describe patterns of publication within a given body of literature), that is, the popularity and impact of specific articles, authors and publications, or to measure the "output" of individuals/research teams, institutions, and countries, to identify national and international networks, and to map the development of new (multi-disciplinary) fields of science and technology (OECD Glossary of Statistical Terms, 2019). Bibliometric methods are now firmly established as a scientific specialty and are an

integral part of the research evaluation methodology (see Ellegaard and Wallin, 2015). We used the method quantitatively to approach a variety of questions in the green bond field.

### 3.2 The study workflow

To retain academic rigour, we followed recommendations given by Zupic and Cater (2015) for conducting science mapping with bibliometric methods. The current study consisted of the following five steps.

**Step 1: Study design.** An increased practical and policy attention for green bonds and a lack of related academic research led us to focus efforts on this specific topic. As research questions of our interest require different bibliometric methods, we have initially assigned the appropriate method for each specific research question. Next, for data search we used the Web of Science (WOS) Core Collection database provided by Thomson Reuters. The WOS database is the most frequently used database for bibliometric studies that covers 21,177 journals (over 74 million records), more than 104,000 books, and over 8 million conference papers (Thomson Reuters, 2019). Its multidisciplinary character and the richness of references, among others, make it at the forefront for decades (Garcia-Machado, 2018).

**Step 2: Data collection.** The compilation of secondary (bibliometric) data from the WOS database was initiated by choosing the search criteria. As we wanted to investigate a finance research subdomain of green bonds (excluding a consideration of broader themes of green-, environmental- or sustainable finance), only two specific search terms were used, i.e. ("*green bond\**") OR ("*climate bond\**"). With these terms, we searched the database on the following categories: title, keywords, abstract and references. We wanted to find out how many articles on green bonds were published across disciplines and how large the proportions of business-related and environment-related disciplines were, respectively. The search resulted in 96 sources match. However, all entries were manually examined to filter the raw data. We managed to identify and excluded 16 topic non-related sources, thus ending with 80 papers in total. An additional effort was made to recognize the three main WOS disciplinary clusters: (1) business-related (covering business finance, business, economics and management subdomains); (2) environment-related (covering environmental studies and environmental sciences); and (3) engineering-related (covering green sustainable science technology, and engineering environmental and engineering industrial subdomains).

**Step 3: Data coding.** Upon completing the online database search, a specific coding procedure was introduced to get additional insights about filtered papers' content and methodology. First, the subject topic area categories (e.g. characteristics of green bonds, green bond market development, regulatory aspects) and methodological approach categories (conceptual, review, qualitative or quantitative) were predefined by the author of this study based on a detailed examination of the prior literature and a selection of paper abstracts. Second, a spreadsheet file was created in MS Excel to organize information needed for the descriptive analysis.

**Step 4: Descriptive data analysis.** The WOS analysis tool was used for getting the initial glance of the data set. The descriptive analysis was run to determine the frequency and percentages for several categorical variables observed in the study (WOS categories, publication years, document types, authors and source titles).

**Step 5: Visualization and interpretation.** Finally, the descriptive analysis was followed by a bibliometric analysis. The VOSviewer was chosen as a freely available and commonly-accepted software tool (Van Eck *et al.*, 2010) developed for the purpose of creating and visualizing bibliometric maps.

## 4. Results and discussion

### 4.1 Descriptive analysis

The exploratory descriptive analysis provided insights about the overall number of papers across different domains, authors and publication sources, the geographical coverage of research, as well as the timeline view of publishing.

**Subject categories.** Less than a hundred of items in total were covered by 26 different subject categories (multiple categories per item applies). The most represented were Business Finance (28.9%), Environmental Sciences (24.1%), Green Sustainable Science Technology (22.9%), Economics (21.7%) and Environmental Studies (21.7%).

**Main publication sources.** Green bond research appeared in different sources (publication outlets). More than three-fourths of scholarly work analyzed was published in academic journals (78.3%), and additional 15.7% were conference papers. Other document types generated by WOS (book chapter, early access, review and editorial material) were small in numbers (6.0% or less). Work on green bonds was published in 68 different sources, where *Journal of Cleaner Production* (6.0%), *Energy Policy* (4.8%) and *Journal of Sustainable Finance Investment* (4.8%) were the most common publication targets. Notable differences were not recognized across disciplinary clusters, except from environmental studies/sciences where conferences have been a relevant publishing channel (e.g. *IOP Conference Series Earth and Environmental Science*, and *International Conference on Climate Change*).

**Publication topics and method(s) applied.** In terms of the epistemological orientation, theoretical and empirical papers were almost equally represented (51.3% and 48.7%, respectively). However, we noticed that review as well as quantitative studies largely dominate over conceptual and qualitative studies (up to three times). Empirical papers started to be published from the year 2018 onwards, while theoretical papers became increasingly review-based over time. Most prevalent research themes covered by each paper type are as follows: (1) conceptual papers – usage and implications of green bonds, the ethic-economic analysis of green bonds; (2) review papers – features and impact of green bonds and other financial instruments of sustainable finance, regulatory aspects of the green bond market, drivers and impediments of the market, environmental issues; (3) quantitative papers – the risk-return profile of green bonds, the comparative analysis of the green bond and conventional financial markets, the role of the second-party opinion, determinants of green bond supply, the relation of environmental issues and macroeconomic variables; and (4) qualitative papers – the green bond market in China, regulatory issues.

**Most contributing authors.** We identified the authors whose papers appeared most frequently in the search. Among 166 authors identified in green bond research, John A. Mathews from Macquarie University was the only one to have five publications, followed by Dodik Siswantoro from Universitas Indonesia and Sean Kidney from the Climate Bonds Initiative, who have three publications each.

**A cartography of research.** Our population is comprised of authors coming from 38 countries with a clear prevalence of the UK- and US-employed scholars (16.9% and 15.7%,

respectively). Researchers from France (10.8%) and Italy (10.8%), Australia (9.6%), China (8.4%) and Russia (8.4%) are also well represented. While having a respectful geographical spread, we find that the majority of the research was conducted at EU and Northern American universities. The most represented higher-education institutions (out of 139 in total) in green bond research are the University of London (7.2%), the Russian Academy of Sciences (6.0%) and Luiss Guido Carli University (4.8%).

***Time dynamics of research publications.*** To discover when and how respectful research developed over the years, we analyzed the number of papers on green bonds that were published per year since the appearance of the first paper on the topic (Matthews, Kidney, Mallon, & Hughes, 2010). Therefore, we analyzed the time period 2010-2020 and revealed that the attention for green bonds significantly increased in the end 2010s. The exponential increase in the number of papers is particularly evident during years 2018 and 2019, when the total count of published work increased three times compared to the period 2010-2017.

## 4.2 Bibliometric analysis

A bibliometric method was employed to additionally describe, evaluate and monitor the published research on green bonds and supplement the descriptive overview. By analyzing data through science mapping, we intended to reveal the structure and dynamics of a particular scientific field. We acknowledged that citations are used as a measure of influence (Zupic and Cater, 2015), and conducted several citation-based impact analyses by using VOSviewer.

***Citation analysis.*** Heavily cited papers are considered important. Therefore, we created a list of the top-6 most cited references, authors, sources and author's country affiliation in the field (Table 1).

Table 1: Top-6 most cited references, authors, sources and countries

	<b>No. of citations</b>
<b>Reference</b>	
Gonzalez-Garcia <i>et al.</i> (2011)	53
Mathews <i>et al.</i> (2010)	36
Mathews (2011)	30
Ng and Tao (2016)	16
Flaherty (2017)	15
Zerbib (2019)	10
<b>Author</b>	
Mathews, J. A. (Macquarie University)	82 (5)
Kidney, S. (Climate Bonds Initiative)	52 (3)
McInerney, C. (University College Cork)	6 (2)
Keeley, A. R. (Kyushu University)	3 (2)
Managi, S. (Kyushu University)	3 (2)
Tolliver, C. (Kyushu University)	3 (2)
<b>Source</b>	
<i>Journal of Cleaner Production</i>	67 (5)

<i>Energy Policy</i>	54 (4)
<i>Futures</i>	30 (1)
<i>Research in International Business and Development Southern Africa</i>	16 (2)
<i>Journal of Banking &amp; Finance</i>	11 (1)
	10 (1)
<b>Country</b>	
Italy	88 (9)
Spain	61 (3)
United Kingdom	56 (14)
Austria	55 (2)
Australia	46 (7)
United States	26 (13)

**Co-citation analysis of references.** Citation patterns are relevant to see which publications, and what type of research, has been influential on the literature (De Bakker *et al.*, 2005). Therefore, the relationships of references cited by green bond research papers were identified through co-citation analysis. Four clusters emerged covering distinct themes (see Figure 1). The first cluster (red-coloured, N=20) covered topics such as green finance, green bond market overview and challenges, green bond characteristics, as well as regulatory issues (voluntary guidelines, green financial reforms). The second cluster (green-coloured, N=18) was similar in size and addressed topics such as the impact of CSR on the cost of capital, labelling of green bonds, and comparative analysis of green and conventional bonds. The third cluster (blue-coloured, N=10) primarily highlighted financing of renewable energy and financial aspects of green bonds. Finally, the fourth cluster (yellow-coloured, N=9) comprised of investment-biased papers (investment-related theories, and policy measures and investment decisions) as well as introductory papers on green bonds.

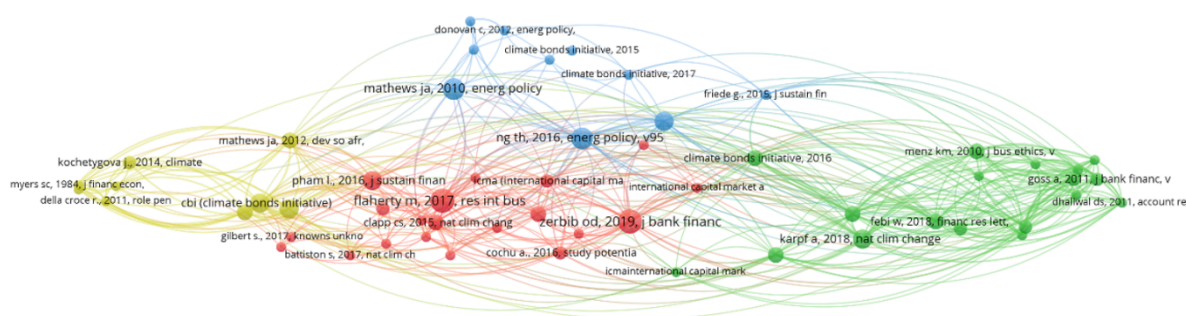


Figure 1: Co-citation analysis of references

Similar procedure was followed to determine the co-citation network of relevant sources (see Figure 2). The most cited publication outlets by green bond research studies were *Energy Policy*, *Journal of Banking & Finance*, *Journal of Cleaner Production*, and *Journal of Business Ethics*.

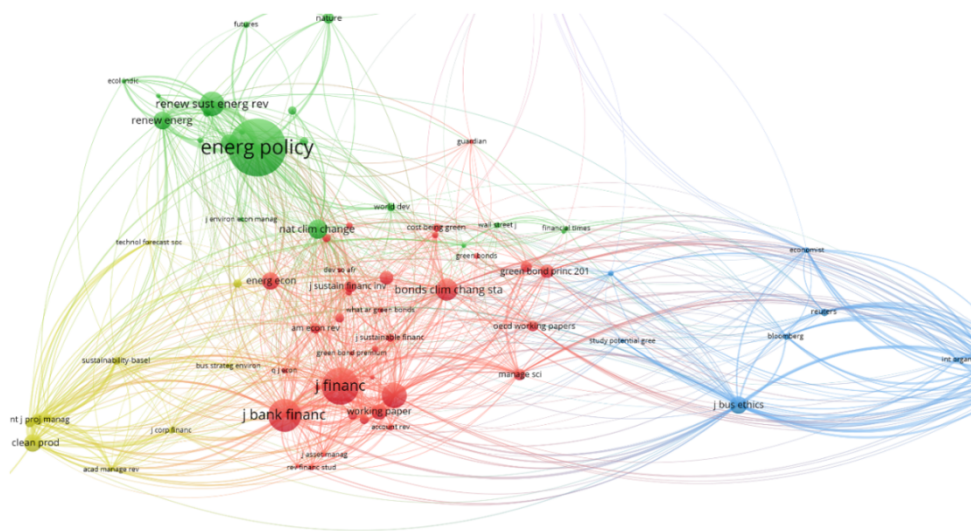


Figure 2: Co-citation analysis of sources

**Bibliographic coupling.** Finally, we introduced the bibliometric method that uses the number of references shared by two papers as a measure of their similarity (more they overlap, stronger the connection). Only papers from 2018 and 2019 were examined not to contaminate the novelty of research topics. In total, 41 papers were analysed and the network map (see Figure 3) was created, showing the importance of 22 WOS-indexed papers. The most important emerging literature is grouped around four topics: the green bond market, the institutional and regulatory perspective of green bonds, the green bond risk-return profile, investors’ pro-environmental preferences. Future scholarly attempts will probably follow these research avenues in building the case for green bond research.

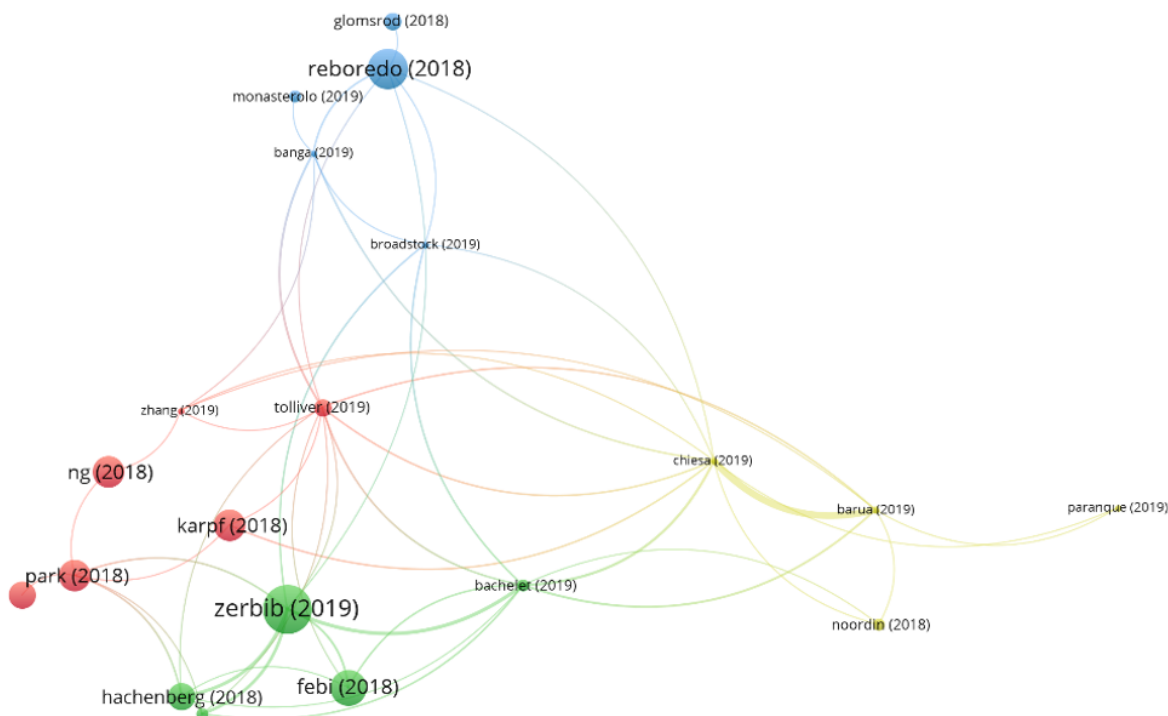


Figure 3: Bibliographic coupling of papers

## 5. Concluding remarks

Our work is an exploratory analysis with the aim to cover the complete domain by using a bibliometric analysis. The quantitative data analysis provided a general overview and specific insights into green bond research. It revealed the interdisciplinary nature of the field and dominance of scholars from most developed countries, it highlighted the most-cited authors, references and sources, as well as shed a light on topics addressed by green bond researchers. The study presents conclusions which are relevant to the field development, however, some limitations should be noted. As green bonds are a novel and smaller research field, future studies should also take into account papers indexed in Scopus, as a broader database compared to WOS. Furthermore, a specific disciplinary analysis might reveal that differences exist not only across but also within disciplinary clusters and subject categories.

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## FINANCIAL PERFORMANCE OF BUSINESS THROUGH DECISION-MAKING METHODS

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### **Abstract**

Decision-making, especially in a business, is an important managerial commitment aimed at business development. The success of decision making depends on the methods used for decision making. The method relates to the set of actions taken to identify, process and analyze the data collected and to enable a critical understanding of the situation where the decision focuses on. In this context, the method represents a manager's mental process to select the necessary actions that lead to efficient decision making. Actions taken in business referring to decision making have differences between them and reflect the quality of the decision. It is these differences that distinguish between the intuitive and the analytical methods of decision making, which this paper also refers to.

**Key words:** decision-making, analytical method, intuitive method, financial performance indicators, etc.

### **Literature review:**

Everyday life makes individuals face with many problematics that are diverse and evidences necessity to find the efficient solution. The solution involves the individuals in decision-making activity. Individuals take decision for personal problems or for the business where they work. For this, decision-making is ubiquitous for everybody, both as personal aspect or as part or leader in a business. Especially, the business is very sensitive to decision-making, as it is needed to take decision for production and financial decisions. So decision-making is a permanent activity in every business life and determines the impact in their performance. This makes decisions a ubiquitous phenomenon and with interest for both employees that operate in business and also for leaders of the business that represent two different groups of interest.

As above, decision-making involves numerous and different problems. For this, decision-making deserves attention and makes business managers to be more responsible.

Managers, during the activity, must choose between many leading alternatives, how they can produce the product or stop it, to enlarge or to shrink the product ranges, to increase or reduce the budget, to improve the technology or to continue with actual technology, to penetrate into new markets, enlarge the business dimensions, to recruit the new applicants or to hire the employees, etc. All of these requires the solution through the economic decision of the business. Anyway, every decision requires the individual to be the decision-maker related to the problem focus. Das (2008) stressed out: " A decision problem (or recognition problem) is one that takes the form of a question with a "yes" or "no" answer".

This makes the decision-making in general and the decision-making in business condition especially to have the technic difficulties and to be accompanied with expenses and other risks.

From this point of view “Decision-making is arguably the most important job of the senior executive and one of the easiest to get wrong” Garvin and Roberto (2001). Therefore knowing the business decision-making problematics is not only necessary but helpful at the same time, because it is related to find the efficient solutions for business problems.

Decisions in business are different. This variability regards the decision value and the situation complexity in which the decision will be made. The situation complexity increases the possibility of failure. In every situation, decision-making must be a creative activity to ensure success. Creativity bases are values that ensure for post decision-making situation. Every decision estimates from the result in the business performance and its cost, that are conditioned also from the methods that will be used for the decision preparation. The chosen method reduces significantly the negative decision-making consequence.

Based on its content, scholars divide the decision-making in two groups. Anderson (2002) stressed out: “There are, basically, two ways to prioritize items on a list: intuition and analysis”. While, Covina, Slevin and Heeley (2001), Nygren and White (2002), Dane, Rockmann and Pratt (2012) decision-making methods are classified in two groups:

- Intuitive methods
- Analytical methods

There are differences between them. Dane, Rockmann and Pratt (2012) state that: “Critical to the present investigation, intuitive decision-making differs substantially from analytical decision-making”.

***Intuitive methods*** – Actually, managers use simple methods often that refer to experience and personal intuition in decision-making process. Intuitive methods are simple methods. According to Anderson (2002): “Intuition is what we ordinarily use”. Referring to their content, intuitive methods effectively are controversial in some case. It is understandable that intuitive power in decision-making process can not ensure efficient decisions in every case. Intuition using makes to have room for approximation and not effective problem solution where the decision focuses. Based only on intuition, decision-making can not be considered rational and good. Thus, the management intuition way should be replaced with management based on scientific judgement because logical and not intuition is the best influence on decision-making.

Difficulties that the managers face in competitive environment where the business currently develops makes the managerial intuition in decision-making insufficient support to penetrate, analyze and explain the multiple nature activity of the business because “Intuition means just that - that's why reason denies it” Osho (2001). In this confrontation, there are needed other ways to survive. For this, in decision-making process should not be claimed that intuition should be completely denied but its value increases a lot if it is supported from contemporary methods in decision-making.

Society development naturally leads to the necessity of advance methods used in decision-making; they provide finding of efficient solution of economic situations. These methods belong to a later time and will be handled in the second group. Anderson (2002) claims that: “For important and difficult decisions, some analysis is usually a good idea”.

***Analytical methods*** are based on reasoning, calculating, use of different models. There are many different analytical methods that can be used in decision-making as statistical, econometrics and maths methods that are appreciated by many scholars. Black (2010) states: “Statistics is an important decision-making tool in business and is used in virtually every area

of business”. Anderson, Sweeney, Williams, Camm, Martin (2011) deem that: “Linear programming is a problem-solving approach developed to help managers make decisions”. On the other hand, Krajewski & Ritzman (2005) also suggest some formal procedures for the decision-making. Among these procedures we may mention:

- a. Break-even analysis helps the manager identify how much change in volume or demand is necessary before a second alternative becomes better than the first alternative.
- b. The preference matrix, which helps a manager deal with multiple criteria that cannot be evaluated with a single measure of merit, such as total profit or cost.
- c. Decision theory helps the manager choose the best alternative when outcomes are uncertain.
- d. Decision tree, a decision tree helps the manager when decisions are made sequentially-when today’s best decision depends on tomorrow’s decisions and events.

### **Methodology:**

Though decision-making is everywhere in daily activity, in Albania and the region- Macedonia, Montenegro, rarely has been object of the proper study. This situation is the motivation for taking total or partial study in managerial decision-making field.

This paper presents the results of the research for impact of decision-making methods in business performance analyzed in Albania and the region.

For the preparation of this paper there are analysis in a critical way, using different theoretical information that helps to understand the problem focus and there are used the specific technics to process the necessary data. The methodology is drafted specifically for this paper, it consists of two parts:

1. Table work: literature study, research question definition and hypothesis, preparation of the questionnaire, sampling, processing and analyzing the data and drawing conclusions.
2. Terrain work: collecting the secondary and primary data which enabled by questionnaire prepared, interviewing and survey.

**The research purpose:** The study aims at identifying the impact of decision-making methods in financial business performance.

Financial business performance presents a synthesis of different factors that impact in performance. More important, between them, it can assess decision-making methods and its specific elements. This analysis will enable us to judge the impact of different elements of decision-making methods in business performance.

In this paper there are analyzed three indicators of financial business performance. Their choice was made in cooperation with some management experts. Concretely:

- Current ratio is a quite significant indicator of financial performance after evidences about the status of business liquidity. In this context, this indicator is considered very important.
- Returnability ratio or inventory turnover ratio is an appreciated indicator because it refers to the demand for business products; the increase of this indicator evidences an effective business performance.

- Net profit is considered a comprehensive (synthetic) indicator of business performance. For this, the indicator is evaluated from managers, investors and analysts.

For data analysis is consider Coolican (1990), where emphasized: “Significance of test results is reported in the three ways based on p the probability level:

- ‘significant’:  $0.05 > p < 0.01$ ;
- ‘highly significant’:  $0.01 > p < 0.001$ ; and
- ‘very highly significant’:  $0.001 > p$ .

All probabilities reported are based on two-tailed tests as each comparison had two possible directions”.

Taking the consideration of “p” it constitutes the necessity as per Reinhart (2015): “Fisher viewed p as a handy, informal method to see how surprising a set of data might be, rather than part of some strict formal procedure for testing hypothesis”.

Hypothesis raised for this purpose is formulated: *Methods used in decision-making affect business performance*.

The sample is based on general survey on particular branch of economy. It is composed of 167 business of food industry run by local managers that develop their activity in capitals of Albania, Macedonia and Montenegro.

Theoretical study of a problem, regardless of width of it is extend is not enough if it is not followed from a data analysis for present situation of the focus problem of the study. This gives us a complete situation and allows us to come up with the conclusions.

Data analysis has considered statistical methods that allow us the quality in data analysis. Flick (2009) suggested: “Usually you should consider statistical analysis while you are designing the study”. In this paper, the data analysis takes into consideration least square method, as an estimated method. According to Aldrich (2007): “Gauss introduced a procedure for calculating least squares estimates and their precisions”. He later emphasizes that: “Yule introduced a new system of notation adapted to correlation analysis”.

### **Data analysis:**

Performance and problematics related to, represent one of primary duties of the management. Brumbah (1998) accepted that performance means the way of actions and results taken in consideration together. From this point of view, performance is to fulfill certain tasks.

Businesses are very sensitive to performance, which focus the interplay of interests and for this make the employees and heads of the business interested.

Financial performance analysis of the business in this paper is realized of specification based on different indicators, which characterize financial performance.

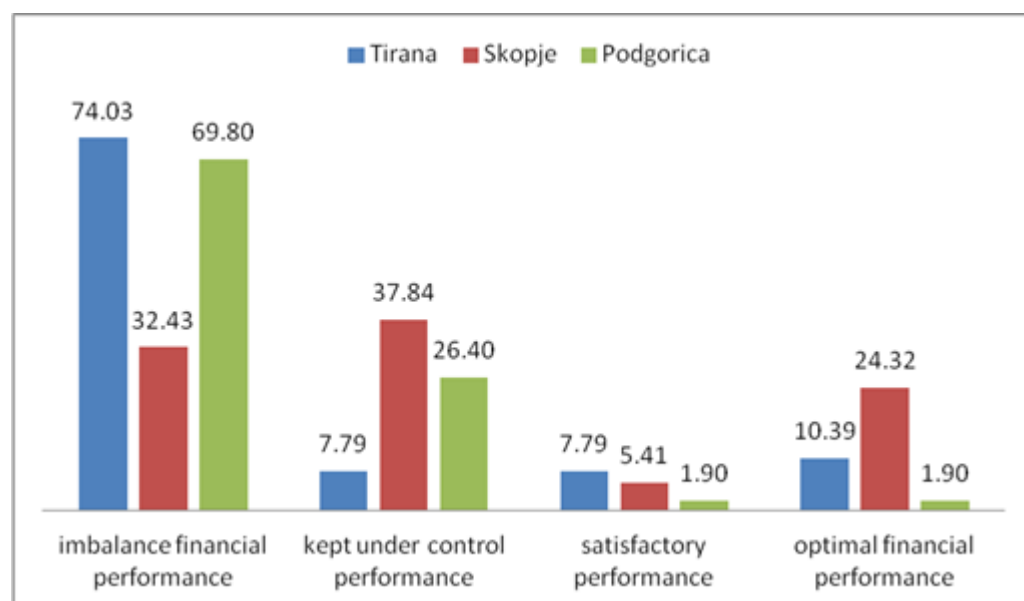
### **Quick Ratio (Liquidity Ratio)**

Quick ratio focuses on the managerial attention. Bowlin (1963): “The current ratio has too much prestige as an analytical tool, and as a result its weaknesses in financial and credit analysis are all to frequently either ignored or unknown”. In reference period, financial

performance which is characterized from “Liquidity Ratio” indicator in three countries that we have analysed showed the problems in general. When analysed by countries this indicator of financial performance shows a situation with evident fluctuations. In Albania, around 74% of analysed businesses have the liquidity ratio smaller than 1 that express unbalanced financial situation. In the same financial situation are businesses in Macedonia with 32.43% and Montenegro with 69.8% of business analysed. This situation expresses a difficulty of the business because businesses can not pay total actual liabilities.

Graphically, the situation is shown as following.

**Figure 1**



*Source: I.Canco file*

In indicator context - Liquidity Ratio are analysed managers evaluations for predicted statements in questionnaire which presents the particular aspect of decision-making methods, which can be considered as the orientation factor of respective methods.

Concretely, there are analysed the evaluations of managers for these statements.

I make decision only when I dispose the necessary data (Q41)

I rarely make important decision if I not consult with my colleagues preliminarily (Q44)

I feel the necessity of trainings in decision-making field (Q418)

I based on my intuition always when I make decisions (Q420)

I make decisions based on my logic (Q421)

I take decisions on independent way (Q425)

Table No.1 identifies the result of the analysis

**Table 1**

Dependent Variable: LRATIO

Method: Least Squares

Sample: 1 167

Included observations: 165

Excluded observations: 2

Variable	Coefficient	Std. Error	t-Statistic	Prob.
C	8.427650	4.985979	1.690270	0.0929
Q41	-0.571030	0.623055	-0.916500	0.3608
<b>Q44</b>	<b>-1.305513</b>	<b>0.549145</b>	<b>-2.377354</b>	<b>0.0186</b>
Q418	-0.127353	0.653941	-0.194747	0.8458
Q420	-0.136827	0.572844	-0.238856	0.8115
Q421	0.323360	0.589018	0.548981	0.5838
Q425	0.018825	0.545132	0.034532	0.9725
R-squared	0.048543	Mean dependent var	1.697670	
Adjusted R-squared	0.012412	S.D. dependent var	6.822701	
S.E. of regression	6.780228	Akaike info criterion	6.707396	
Sum squared resid	7263.495	Schwarz criterion	6.839164	
Log likelihood	-546.3602	F-statistic	1.343518	
Durbin-Watson stat	2.014119	Prob(F-statistic)	0.240982	

Source: I.Canco file

Of the total of these factors analyzed, only the factor referring to the influence of manager's cooperation with subordinates on the decision-making process results statistically at the 'significant' level and as such should be considered for the analysis. This collaboration is formulated in the questionnaire thus: "I rarely make important decision if I not consult with my colleagues preliminarily".

Connection between the depend variable "Financial performance – Liquidity ration" (Y) and independent variable "I rarely make important decision if I not consult with my colleagues preliminarily" (X) expressed as follows:

$$Y = 8.427650 - 1.305513 * x + e$$

Y = Financial performance – Liquidity ration

x = I rarely make important decision if I not consult with my colleagues preliminarily.

Colleagues consultation is necessary because the manager collects the important information for decision-making. Adair (2007) estimates the importance of the information in decision-making and pretends that businesses must have considerable disponibility of the information to use in different situations of the business. Concretely, the whole range of the information is classified in: information required and information available. While, according to Buchanan and O'Connell (2006) "Simon suggests that people would make economically rational



decisions if only they could gather enough information“. In general sense, colleagues consultation presupposes collaboration of decision-maker manager with colleagues.

As above, it is noticed that collaboration of manager with colleagues in decision-making process has resulted in negative impact in financial performance of the business characterized from “Liquidity Ratio” indicator. This result should not be abolished and to think that collaboration between colleagues in managerial decision-making process indicates negatively in financial performance. In every case the collaboration is necessary and valuable at the same time. So, Huxham (1996) considers the collaboration as follow:

- “Collaboration is happening: right across the world, people are doing it, or rather, people are trying it, often unsuccessfully.
- Collaboration is valuable; it can be a good way of achieving things that would be difficult or impossible for an organization to do on its own (the selfinterest motivation)”.

Negative result should not get in conclusion that in every case the collaboration impact negatively in performance.

Based on this logic, it is further analyzed through sonorous questions, from it comes up that impact of collaboration should be analyzed in quality context of collaboration and especially in the way of understanding of collaboration from each participating employees in decision-making.

Therefor, Himmelman (1992) claims: “Specifically, organizational collaboration is defined as a 'process in which organization exchange information, alter activities, share resources and enhance each others'capacity for mutual benefit and a common purpose by sharing risks, responsibilities and rewards' (Himmelman, 1992)”.

Based on these conclusions we can concluded that impact scale of “collaboration with subordinates” in financial performance should not be taken as an absolute impact on the quality of the decision. Some of the factors that condition the success of the cooperation in decision-making process they can consider, are:

- Professionalism of collaboration to create the auxiliary factors on purpose to be successful in objectives achieved, which can not achieve only from a person.
- Personal characteristics of collaborators.
- Organizational culture refers the organizational tendencies for individual behavior and relations and those in employees’ groups for placement of their relationship of collaboration.
- Availability and quality of data for organizational performance in previous periods.

Based on these conclusions, we can conclude that the extent of the impact of “cooperating with subordinates” on financial performance should not be taken as a separate issue but also contingent on a number of factors.

- The professionalism of associates to create auxiliary factors in order to be successful in achieving predetermined objectives, which cannot be achieved by a single person.
- Personal characteristics of associates.

- The culture of the organization, refers to the organization's propensity for individual and group behavior and employee relationships to establish their interaction relationships.

Other case factors, predicted ones, which impact can cause such a situation.

### **Returnability ratio or inventory turnover**

Economic development of every business can not be achieved if it is not considering the speed of inventory turnover, which are calculated with “inventory turnover” indicator. Reynolds suggested the periodical analysis for “inventory turnover” indicator. Thus, Reynolds (1999) emphasizes that: “Periodic inventory-turnover analysis provides operators with a tool for improving their inventory-management practices, especially when coupled with common precautions such as monitoring deliveries, dealing with preferred vendors, rotating stock, and keeping prices up to date”. This indicator evidences the managerial commitment through decision-making to avoid as much as inventory stock. For this, Kruger (2016) stressed out: “If you’re in an inventory-based business, managing your inventory efficiently is critical to your profit and success”.

The fastest inventory turnover in general in the business and especially for the food industry that we have analyzed, takes special importance because these businesses are very exposed to risk of inventory expiry. Different countries performed the inventory turnover in different ratios. Considering as focal point the return ratio (inventory turnover ratio) average of respective industry for the same reference period resulted as:

- Albania, on the average has a return ratio 7.53 times. About 26% of the businesses have performed a return ratio smaller than average of the industry and 5.2% of them have a poor financial performance with a return ratio smaller than 1 time, which evidences a risk of not sale the inventory. While, 68% of Albanian businesses perform a return ratio over average ratio of industry.
- Considering this indicator, financial performance of businesses in Macedonia compared to Albania has shown a poor one. This is for the fact that 45.9% of businesses show a not promising performance because their return ratio is smaller than the average of the industry. From this, 5.4% of businesses have return ratio smaller than 1 time. Around 54.1% are over average level of this ratio.
- Businesses in Montenegro as in Macedonia are characterized by the unsatisfactory performance. Around 45.3% of the businesses have the return ration 3.9 time smaller than the average of the branch and 54.7 % of businesses present a good performance because the return ratio is over average ratio of the industry.

As we have discussed above, we can concluded that businesses keep a lot of inventory. Excess inventory is unproductive, of course, it represents an investment with zero return speed. This relatively low turnover verifies the fact that businesses are keeping stocks that risk the business activity.

In the context of impact of decision-making methods in financial performance indicator “inventory turnover” considers the evaluations of managers for the above factors. Their impact remains to be tested. Testing is presented as follow.

Table 2

Dependent Variable: ROI

Method: Least Squares

Sample: 1 167

Included observations: 165

Excluded observations: 2

Variable	Coefficien t	Std. Error	t-Statistic	Prob.
C	3.154183	5.396767	0.584458	0.5597
Q41	-0.837336	0.674388	-1.241624	0.2162
Q44	0.384415	0.594389	0.646740	0.5187
Q418	0.694761	0.707818	0.981553	0.3278
Q420	0.365412	0.620040	0.589337	0.5565
Q421	1.462424	0.637547	2.293830	0.0231
Q425	-1.570379	0.590045	-2.661457	0.0086
R-squared	0.096396	Mean dependent var	5.773503	
Adjusted R-squared	0.062082	S.D. dependent var	7.577834	
S.E. of regression	7.338840	Akaike info criterion	6.865737	
Sum squared resid	8509.655	Schëarz criterion	6.997504	
Log likelihood	-559.4233	F-statistic	2.809241	
Durbin-Watson stat	1.670329	Prob(F-statistic)	0.012642	

Source: I.Canco file

Probabilities presented as above prove from the whole of analysis factors, only factor “I make decisions based on my logic” resulted significant and factor “I take decisions on independent way” resulted high significant, thus appear statistically significant. These factors affect in business performance characterized from “inventory turnover” in different way. Impact rate can be expressed with the model.

$$Y = 3.154183 + 1.462424*x_1 - 1.570379*x_2$$

where:

Y – dependent variable, financial performance of business characterized by “*inventory turnover*”

x<sub>1</sub> - I make decisions based on my logic

x<sub>2</sub> - I take decisions on independent way

Using of logic from managerial point of view in decision-making supported in accepted reality. Personal logic is a result of personal preparation and personal experience of employees. Personal experience provides that knowledge returns of obedience. Obedience makes managers to perceive its logic with reasonable assurance. Supporting personal conviction is present phenomenon

The manager's use of logic in decision making supports an acceptable reality. Personal logic is the result of professional training and personal experience of the employee. Personal

experience enables knowledge to be converted into persuasion. Obedience makes the manager perceive with reasonable certainty his logic. Reliance on personal conviction is a phenomenon mainly present in routine decision making, as in routine decisions problems are generally recognized in advance by the manager. This refers to the fact that: “Intuition, fully developed, is a highly efficient way of knowing. It is fast and accurate”. Agor (1986). The use of intuition in decision making may result in a positive impact. For this Zutshi and Dr. Creed (2011) assume that: “Making an intuitive decision that later turns out wrong can be a surprise, especially for managers who have a good record of intuitive successes”. However intuition does not analyze, it must be considered as a knowledge gained during life.

However, it is evident that the overall impact of intuitive methods on decision making and consequently on business performance is weak. Thus, independent decision making by the manager results in a negative impact on the financial performance referred to as “inventory turnover”. Inventories in a business consist of different elements. Their management requires not only managerial knowledge, but also technical knowledge, which evidences collaboration in decision making. Independent decision-making is decision-making based entirely on the experience of the manager. As such it affects the quality of inventory management and not only directly reflected in the optimistic business performance.

### **Net profit**

Businesses are very interested in financial performance, referring to the “Net Profit” indicators. Net profit is the focus of information on the financial position of the business. For Lan (2012) “Earnings provide an ongoing score of a company’s success or failure and are used to determine a company’s value”. Whereas for Stickney, Weil, Schipper and Francis (2010): “Resource allocation decisions of investors and creditors depend on reliable and relevant information about firm's financial positions, profitably and risk”. In this context, it is of interest to gain insight into the relationship between the “Net Profit” indicators and the methods used in decision making. This question is answered if we analyze the data referring to the relationship between financial performance - net profit and decision making methods.

The financial performance of the businesses analyzed is not promising at all, which is also acknowledged by the managers of these businesses. About 9.1% of businesses in Albania result in significant losses, in Montenegro around 19% and in Macedonia about 1.1%. A considerable number of businesses make an annual profit of less than 5000 thousand ALL. They represent 27.1% of businesses in Albania, 18.9% of businesses in Macedonia and 32% in Montenegro.

Concerning decision-making methods, intuitive methods are dominant in managerial decision-making in the countries under analysis, which has also resulted from the leading questions asked to managers during the survey process. This reality is a direct reflection of the situation in post-dictatorial decision-making whose economies have been centralized. In these conditions, collective ownership is associated with a lack of flexibility in decision-making. The following Table no.3 informs us that:

**Table 3**

Dependent Variable: NET

Method: Least Squares

Sample: 1 167

Included observations: 165

Excluded observations: 2

Variable	Coefficien t	Std. Error	t-Statistic	Prob.
C	70084.86	185461.8	0.377894	0.7060
Q41	4048.948	23175.57	0.174708	0.8615
Q44	12073.77	20426.37	0.591087	0.5553
Q418	6135.873	24324.40	0.252252	0.8012
<b>Q420</b>	<b>-45793.09</b>	<b>21307.89</b>	<b>-2.149114</b>	<b>0.0331</b>
Q421	-7533.056	21909.51	-0.343826	0.7314
Q425	30295.50	20277.09	1.494075	0.1372
R-squared	0.039568	Mean dependent var	63467.37	
Adjusted R-squared	0.003095	S.D. dependent var	252593.0	
S.E. of regression	252201.8	Akaike info criterion	27.75534	
Sum squared resid	1.00E+13	Schwarz criterion	27.88711	
Log likelihood	-2282.816	F-statistic	1.084872	
Durbin-Watson stat	1.848326	Prob(F-statistic)	0.373796	

*Source:* I.Canco file

The table above indicates that only the factor “I always rely on my intuition when making decisions” is statistically significant ( $p = 0.0331$ ) and the analysis should be considered. As can be seen, the use of intuitive methods in decision-making has adversely affected the financial performance of the analyzed businesses with respect to net profit.

The model that expresses the link between the use of intuitive decision-making methods and the financial performance of the business characterized by the “Net Profit” indicator can be presented as follows:

$$Y = 70084.86 - 45793.09 \cdot x_1$$

Y- “Net Profit” financial indicator

$x_1$ - I based on my intuition always when I make decisions

The above relationship expresses the fact that the negative impact of using intuitive methods in managerial decision-making on financial performance referred to as “Net profit” is considerable.

Without denying the role of intuition in decision-making, managers of regional countries should also orient their decision-making activity by analytical methods. For this, Koontz and Welrich (2010) acknowledge that: “Reliance, on past experience, probably plays a larger part than it deserves in decision-making”. But the above authors consider the fact that: “Relying on past experience as a guide for future action can be dangerous” (Koontz and Welrich (2010). Other scholars such as Munier, Nolberto (2011) see the use of intuitive methods in decision making especially in business decision making as a problematic activity. Munier, Nolberto

(2011) states: “When this picture relates with a complex problem like the selection of environmental indicators at all levels, where there could be literally hundreds of alternatives, solving the problem ‘by hand’ is utopian”. While Sartre. (1945): “An essential feature of consciousness is its negative power, by which we can experience ‘nothingness’”.

By formal logic the manager is free to choose the method he will use in decision making, but the choice of method is also a responsibility. For this we refer to Sartre (1957) who has stated that: “Furthermore, this absolute responsibility is not resignation, it is simply the logical requirement of the consequences of our freedom”

### **Conclusions:**

At the conclusion of this paper we can come to some conclusions:

Theoretically, the paper shows that:

1. Decision-making is a ubiquitous, very important, risk-taking managerial commitment and as such deserves managerial decision-making.
2. Managerial success reflected in business performance is largely conditioned by the methods the manager uses in decision making.

In practical terms, the analysis conducted in the countries of the region shows that:

1. The analyzed financial performance indicators are influenced by the method used in managerial decision making. The magnitude of this impact varies.
2. Managers of the region are more oriented towards the use of intuitive methods in decision making, as it can be said that the use of intuitive methods are the dominant method of managers. This is not only because of the very characteristics of intuitive methods, but also because of the influence of these states' past as post-dictatorial states.
3. Generally intuitive methods of decision making do not appear to have a positive impact on business performance.
4. Since the financial situation of the analyzed businesses is not optimistic at all, it is necessary for managers to orient their decision-making activity by analytical methods.
5. The use of analytical methods in decision making necessitates the presence of a database and its updating to ensure the availability of historical data to support decision makers in business.

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**THE CONNECTION BETWEEN THE EMPLOYEE SATISFACTION AND THE  
LEARNING AND DEVELOPMENT PROCESS IN THE GREEK TOURISM  
INDUSTRY: A QUALITATIVE ANALYSIS.**

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**Abstract**

This study investigates a correlation between Employee Satisfaction and Learning and Development process in a hotel in Greece. The objectives are: to investigate elements of Job Satisfaction, to discuss Learning and Development issues and methods of Training which are applied, to report some characteristics that the trainer and the person being trained need to maintain; furthermore, to explore features of the service quality in relation with training, employee satisfaction and customer satisfaction, to analyze the correlation between employee satisfaction and the training and development procedure, to critically evaluate the material of the research in order to provide recommendations and conclusions. This study approaches the subject in a qualitative manner and the semi-structured interview is a significant method for the conduction of this research. The findings show that the training and development process is linked with employee satisfaction. The relationship with the colleagues, the autonomy and the training contribute to the job satisfaction. Informal and on the job training are mainly applied in the hotel. Certain characteristics that the trainer and the person being trained need to have are reported in the study. The dimensions of service quality are important for the business according to the interviewees. Training and development give positive emotions to the trainer who transmits the experience. Plus; the process is valuable for the persons receiving the training, since they gain qualification, become better employees and share satisfaction emotions. This paper could be useful for hospitality students, potential trainees, hotel employees, hotel managers, hotel owners. Plus; it focuses on the small-medium sized business, which, usually do not have a particular Human Resources Management department; in this case it can provide an overview of employees' thoughts in relation with literature review studies in order to be a source of information for practical application in the hospitality sector.

**Key words:** Learning and Development, Training, Employee Satisfaction, Qualitative Analysis.

**Introduction**

According to Mathis & Jackson (1994) job satisfaction is 'a positive emotional state resulting from the appraisal of one's job experiences' (Mathis&Jackson, 1994, p. 98). 'Learning and Development is a relatively new term, used to indicate a field that is more generally known in the academic literature as Human Resource Development' (Harrison, 2002, p. 15); there are so many meanings connected to the development process that it is arbitrary to chose one definition of Human Resource Development (Harrison, 2002, p 16.). Learning and Development as a topic of management research and practice is associated with the way

individuals obtain or create knowledge and skills, which enable them to perform and grow their present or future professional position (Sadler-Smith, 2006, p. 2). Concerning the training procedure various sources identify and classify it, in a different way (Buick&Muthu, 1997). Moreover, ‘working in an organization is a continual learning process, and learning is at the heart of all training activities’ (Mathis&Jackson, 1994, p.272).

The Greek tourism is an important domain for the Greek economy; in the year 2018, the arrivals of non habitants were 30,1 million and the revenue was about 15,6 billion euros – arrivals and income from cruise ships are not included (Sete, 2020). A characteristic of Greek tourism is the seasonality as 54,8% of the arrivals occur during July-August-September (Sete, 2020). International investments and brands show their interest (Mantikidis, 2018). Yet; there are small and medium sized businesses which obtain a part of the market and they have different operational characteristics. The category of micro, small and medium sized enterprises (SMEs) refers to enterprises, which employ fewer than 250 persons and have an annual turnover not exceeding 50 million euros, and/or an annual balance sheet total not more than 43 million euros (European Commission, 2015); according to EU (2020) a small firm employs up to 50 employees with turnover or balance sheet total up to 10 million euros; small and medium sized enterprises (SMEs) represent 99% of all businesses in the EU (EU, 2020). Politis et al. (2009) conducted a research in order to propose a business excellence model in high class (four stars and more) Greek hotels; according to the survey with interviews conducted amongst hotel managers, leadership and human resources management are considered as the most important enablers criteria (related with organization’s approaches) for business excellence. However; there is no extended available research about the Greek Hospitality Industry. This research focuses on learning and development, training and employee satisfaction and the relationship that exists amongst them, concerning a small sized (according to EU regulation) hotel in the Greek Tourism Industry.

The objectives of this paper are: To discuss elements of job satisfaction, to analyze Learning and Development issues and several methods of training which are applied, to explore dimensions of the service quality in relation with employee satisfaction and customer satisfaction, to investigate several characteristics of the trainer and the person being trained, to research the connection between employee satisfaction and the training and development procedure in a small sized hotel, to end with the provision of several conclusions.

This is a qualitative study conducted in a small seized hotel in Greece and the semi-structured interview is a significant tool for this research. At the beginning of this paper there is an overview of literature review elements followed by the description of the methodology and the stance description. After, the findings are presented, then discussion and recommendations are mentioned and finally the conclusions are articulated.

## **Literature Review**

In the literature, several job facets which are linked with the employee satisfaction were reported by Gallardo et al. (2010) some of those were: the relationship with the colleagues, the autonomy and the received training. According to the literature, autonomy in job is related with fulfillment of human needs and concerns frontline employees who are in contact with the client (Slatten & Mehmetoglu, 2011). Plus; Amin et al. (2017) indicated that customer focus is related with the employee satisfaction and the hotel performance. Moreover, the topic of Emotional Intelligence (Iordanoglou et al., 2016; Goleman et al., 2014) in the workplace is linked with

positive emotions experience. The emotions in the work environment are dynamic and they affect the accomplishment of a procedure (Goleman et al., 2014, p. 34-35). When people feel well, they perform high quality results (Goleman et al., 2014, p. 37). Plus; the join which concerns the leader empowering behaviors and the employee psychological empowerment on customer satisfaction is investigated by Namasivayam et al. (2014); the researchers suggest that the employee satisfaction is positively related with the customer satisfaction. Additionally, the leader empowering behavior affects the psychological empowerment which is connected with the employee satisfaction (Namasivayam et al., 2014). Development and rewards positively affect the employee job satisfaction; moreover, the job satisfaction influences the customer-orientated behavior (Choi&Joung, 2017).

Training and development in medium and small sized firms in the UK were analyzed by Kyriakidou & Maroudas (2010); informal and on the job methods are mostly incorporated in the firm's culture; plus, one of the concepts that the researchers brought out, was the concept of 'think like owners', which implies that workforce members are encouraged to participate essentially to the activities of the company. A qualitative research by Kalargurou & Woods (2011) was about the competences that a trainer needs to have. Several aspects of the in-house Employee Training and Development, such as on the job and role playing, within Hotels in Scotland were investigated by Buick & Muthu (1997). Additionally, the employees' access to training and the support for training positively affect employees' service innovation performance (Chen, 2017). Research which shows that the learning orientation is positively related with new service development was conducted about the Swiss hotel industry by Tajeddini (2011). Furthermore, the analysis of several models, such as EFQM (EFQM, 2019) or Total Quality Management (Deming, 1985; Amin et al., 2017) is connected with the Learning and Development procedure. Moreover, the reference to dimensions of service quality (Parasuraman et al. 1985, 1991) is related, amongst other features, to the training procedure. According to Jaworski et al. (2018) training in the hospitality industry is associated with job satisfaction and better guest satisfaction.

### **Methodology**

This study is a qualitative approach and the semi-structured interview was selected to be applied; ten employees of a small sized hotel took part in the interview procedure. There were several listed questions used as a guide for a discussion. However, there was the possibility of a variation of the way of the discussion depending on the interviewees' opinions and experiences (Bryman & Bell, 2007, p.474). During the process of this research, journals, articles and books were used but also elements were retrieved from web-sites and thus secondary research took place. In addition, observation contributed to the process of the evaluation of the situation in the Hotel. Plus; the interviews were used as a resource of primary data.

The literature review and the writing of the section is based on research which took place mainly from November (2018) until April (2019), then the main topics to explore during the semi-structured interviews were selected. For the needs of this study 10 interviews of managers and employees of a hotel took place; the interviewees were from the Reception Department and the F&B Department. The interviews occurred from the 30<sup>th</sup> of June until the 22<sup>nd</sup> of July (2019). The interviewees were from 29 up to 50 years old, they were all male, from low to higher level of education. The people of the hotel who were interviewed were: The Reservations Manager, the Front Office Manager, the night auditor, the Bar Manager, two barmen and four waiters. The interviews took place in empty hotel rooms, with the requested

permission, and the duration of them was 30 minutes on average. They were asked about how they feel concerning several features of employee satisfaction, which were retrieved by the research of Gallardo et al. (2011) and those were: relationship with the colleagues, the autonomy and the received training. They were asked to mention three characteristics that the trainer and the person being trained need to have during the training procedure. There was a question about how they feel about the dimensions of service quality as they have been reported by Parasuraman et al (1985, 1991). It was requested by them to describe the challenges of their position and the emotions that they experience at workplace. Another topic which was discussed with all of them was the concept of ‘think like owners’ which was articulated by Kyriakidou & Maroudas, concerning the small-medium enterprises, meaning that employees are motivated to contribute as essential part of the firm (2010). Finally, they said in which way they feel that the training is associated with job satisfaction.

The reaction of the employees was very positive as everyone who was asked took place and signed the participant’s consent. This was part of the ethical standards of this study. For the needs of this study and with the intense to preserve the anonymity the interviewees were given numbers from one to ten. The material of the recordings was written from the 14<sup>th</sup> until the 23<sup>rd</sup> of July (2019). The results were analyzed in order to stimulate the findings, which were studied in correlation with the literature review in order to declare the conclusions.

#### Stance Description –The Case Study

According to the interviewee 1 the philosophy is to ‘Welcome our guests, no clients’. The hotel nowadays is a four star lodging property with beautiful rooms. The hotel has 20-30 employees according to the needs of the season. The departments of this small sized business are the Reception, the Housekeeping, the F&B and the Entertainers performing at the sunset bar. The hotel has successful levels of occupancy, repeater guests and committed managers and employees. This study reports how the members of a small sized hotel in Greece feel concerning the Employee Satisfaction and Training and Development factors in a modern and highly competitive tourism market.

### Findings

#### Employee Satisfaction

The relationship with the colleagues is positively related with the employee satisfaction according to the interviews. Exemplary, for the interviewee 1, the relationship between the colleagues is very important as he says that when there is unity, the business can prosper. The interviewee 2, reported that the communication and the understanding need to exist amongst the employees. The interviewee 5 stated that there is a team and if this relationship doesn’t function properly there is a problem in the system.

The autonomy is positively related to employee satisfaction; this arises from the answers during the research. Concerning the autonomy, the interviewee 1 reported that there are always dilemmas at work; many decisions for the good of the guests, of the business or of the position need to be taken; several times the decision is difficult but the finding of the solution provides the individual with extra experience. The interviewee 2, pointed out that there are many ways to reach an objective and the persons need to find their own way. The interviewee 4, mentioned

that autonomy makes the people more responsible but there are cases, in which we need to ask directions from the relevant person in the business.

During the semi-structured interviews was discussed the topic of the emotions that people have in their workplace. The interviewees were asked to mention three emotions that they experience. The results showed that mainly positive emotions such as joy (4 interviewees), respect (2 interviewees), and gratefulness (2 interviewees) are experienced; the following answers were mentioned one time during the interviews procedure: pleasure, appreciation, feel like home, satisfaction, friendliness, calmness, psychological uplift and love. Finally, three people mentioned that sometimes experience anger and one, sadness.

One of the topics of the semi-structured interview was the conception which was found in the literature that several employees in the small-sized businesses “think like owners” which means that they are encouraged to feel as integral part of the business and that their contribution is important (Kyriakidou & Maroudas, 2010). The interviewee 2 reported that this concept provides people with motivation. According to the interviewee 3, this point of view is important for the employee and for the owner when he notices it; plus, it is a way to look at the things through a more positive way. The interviewee 4, reported that he behaves in that way in the working place; however, he is aware that it is not the owner and keeps a measure in the way he acts. All the interviewees expressed a positive relation with the leadership of the hotel.

#### Learning and Development, Training

After conducting ten interviews, elements concerning the employee learning and development procedures were found. The majority of the employees replied that the training they received was on the job and informal.

Furthermore, the interviewees were asked to name the three most important characteristics that a trainer and a person being trained need to have, according to their opinion. The most frequent answer referring to the characteristics of the trainer was to be patient (5 people), followed by the answer communicative (3 people), then was friendly and calm (2 people) and only once were reported the following elements: explanatory, motivating, polite, willing, use repetition, disciplined, experienced, teamwork, empathy, not judgmental. Concerning the employee being trained four people chose the ability to listen and the will to learn, three people chose patience, two people comprehension, keeping notes, smile, being polite and finally, one time were mentioned: communicative, positive energy, practical spirit and sociable.

With the idea of considering the needs of a training procedure, the interviewees were asked about the challenges of their position. The challenges and the improvement is an element linked with the training. About the challenges of the position, the interviewee 2 reported that people always need to become better, if they consider this and turn it to action the position itself is a challenge, there is contact with different people and people are complicated; moreover, there is the need to motivate the colleagues. Plus; all the interviewees declared as one of the challenges, the contact with the guests. Furthermore, the interviewees were asked how they feel concerning several characteristics of the service provision such as reliability, responsiveness, empathy and tangibles; those factors are considered significant from the interviewees and thus important for their continuous improvement during training and development.

### Learning and Development, Training and Employee Satisfaction

The interviewees were asked about the meaning of Training procedure in correlation with the Employee satisfaction. According to the interviewee 1, the Training and Development gives satisfaction because experience is being improved; plus, he gains satisfaction as a trainer when he transmits his knowledge to the less experienced members. The employee 3, said that from the beginning, during his training the members of the hotel were very supportive and friendly and they showed that it would be a pleasant workplace. The employee 4, expressed the opinion that the F&B domain is evolving and people who want to grow need to study and be informed; he introduced the element of the possibility of the self-development, for example, seminars and techniques, which can also be seen on the internet; during every season the employee needs to come back better and up-dated in order to provide quality service and contribute to the guest satisfaction. The interviewee 5, mentioned that training is very important and estimated that if his hiring was not that urgent he would have the option for better training; however, he had the opportunity to learn much on the job and he highlighted that he is thankful that he was given this chance of on the job training at his professional beginning. The interviewee 7, declared that if somebody does not learn and is not being trained, he cannot be good at the job. According to interviewee 7, training is important to all workplaces and it contributes to the employee satisfaction because when people learn they can make things easier and enjoy the work. The interviewee 8, pointed out an informal training procedure which is supported by the owner of the hotel; at the beginning of the season the owner gave directions about the conception of service, he added that during the season the owner spends time at the pool bar and makes the needed notifications. Plus; he reported that the waiters informally discuss amongst them about possible problems to find practical solutions. The interviewee 9, reported that when he was hired he had to learn many things on the job by the more experienced members of the staff. The interviewee 10, declared that the training is connected with the job satisfaction, as when people learn feel happy and positive, they produce and achieve a better performance.

### Discussion and Recommendations

Learning and Development is a particular domain in the business sector; there are various characteristics linked with this; education and training are the basic factors leading to learning and development (Harrison, 2002, page 4). During the interviews, employee 4 reported possibilities of self-learning, which permit the employees to improve their skills and employee 7 also mentioned the option of seminars. Concerning the Development, in the case of this hotel, it occurs through the relation with the leadership, the experience gained every day, the comments by the managers and through the relationship and informal discussions with the colleagues; the culture created by the leadership offers a space in which the employees evolve through the everyday activities. The training in most of the cases is on the job and informal. Kyriakidou & Maroudas (2010) who investigated small and medium sized firms in the UK found that informal approach integrated in the culture of the business, provides positive training environment. Still; the employees of the F&B department mentioned that one year they received complimentary hours of training about service provision when the restaurant and the bar were not operating; this mode of training gave them also satisfaction. According to the interviewees, the informal methods of training and development are factors of employee satisfaction; they all reported a positive contact with the leadership.

The relationship with the colleagues and the autonomy are connected with employee satisfaction in the research by Gallardo et al. (2010), the answers of the employees in this

qualitative research were in accordance with this. Kalargurou & Woods (2011) investigated in qualitative manner the characteristics for effective training managers, the participants were ten training professionals; however in the present research the participants are the managers, the night auditor and the waiters. Patience was the most frequent answer for the trainer in this research; Costello (1997) found that flexibility and patience were important competences for a trainer (Kalargurou and Woods, 2011). Concerning the dimensions of the service, even though the employees were not aware of the literature (Parasuraman et al. 1985, 1991), they all agreed that those service characteristics are significant for their professional performance and the guest satisfaction. Finally, all the interviewees agreed that the learning and development and the training process is linked with the employee satisfaction; Kusluvan et al. (2010) mention that orientation and training offers employee satisfaction.

The research for this study occurred mainly in the year 2019. In the year 2020 the outbreak of Coronavirus COVID-19 disease affected Tourism; as a result International Tourism Organization, revised the 2020 forecast, estimating that the predictions are likely to be further revised (UNWTO, 2020). The UNWTO marked the significance of cooperation and solidarity (UNWTO, 2020). Under this circumstance the EU provided data and guidance concerning risk assessments and public health (ECDC, 2020). However; risk management experts suggested that companies and governments should focus on how to rebuilt systems when the crisis recedes (QZ, 2020).

Through the research and the answers of the employees, it would be possible to materialize a training process, which would be based on their needs and include also other forms of learning such as videos, e-manual, discussion and self-development approach. Concerning the cost, in a frame of a global considerable situation, the training could be based on available sources, internal trainer's skills and experience. The sections of training could be: Information about the hotel, service quality, information and discussion about the characteristics of the trainer and the new employee, teamwork, management of anger or stress and empowerment of positive emotions. This training could be evaluated through formal performance appraisal process via interviews with employees.

### **Limitations**

This research is a qualitative research, which was conducted within the members of a small sized hotel on a Greek island in Cyclades; ten interviews took place for the needs of the research. The material might be useful for small or medium sized businesses with similar characteristics. The procedure of the interviews and collecting the employees' opinions and needs may be helpful for small and medium sized businesses, which have similar methods of training. However; this procedure as described here refers mainly to a small hotel businesses and a research about more similar hospitality venues in the same or other countries could be useful for the future.

### **Conclusions**

Learning and Development contributes to the employee satisfaction in various ways, such as having the joy to obtain knowledge, giving the opportunity to become better in one's job or to transmit knowledge to the new employees. Several factors of employee satisfaction,

such as the positive relationship with the colleagues and the autonomy are mentioned in the literature review; Learning and Development and training procedure can also play a role to these characteristics as it may improve the relationships and qualify the person in order to build up the autonomy in the position.

During the research the interviewees articulated several characteristics, which they believe that are important for the trainer (mainly patient, communicative, friendly and calm) and the person being trained (the characteristic to listen, the will to learn and patience were mostly mentioned); this field is open for further discussion, future exploration, experimentation and appears interesting while creating and proceeding with the training issues in correlation with employee satisfaction.

The employees described some positive emotions experienced during the working hours in the hotel; mainly joy, respect and gratefulness. In addition; they mentioned that even if rarely they feel undesirable emotions, this does not influence their job performance. Moreover; sometimes they may need to change the guest's emotional condition, through the way of communication and the service provision. The existence of positive emotions was marked as part of the job and also an element which is linked with their learning and development issues and employee satisfaction.

Moreover, the service dimensions (Parasuraman et al. 1985, 1991) are important for the service provision; this is reported in the literature and accepted by the interviewees. A training procedure is possible to contribute to the improvement of those dimensions in a firm.

The leadership of the hotel, the vision and the business culture influence Learning and Development procedure and employee satisfaction. Plus; the informal and on the job training are mainly applied; they are linked with employee satisfaction and lead to improvement of the skills of the staff members. The interviewees expressed several of the challenges of their position; a training procedure in alignment with those challenges will guide them to become better at their job and achieve higher levels of employee and guest satisfaction.

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## KOSOVO MUSEUM ACTIVITY DURING 90S - DESTRUCTION OF THE MUSEUM OF THE REVOLUTION

**Ma. Besnik Rraci, Ph.D. candidate**

Custos at the National Museum of Kosovo

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### Abstract

The Museum of the Revolution as well as the Museum of Kosovo, as important institutions of cultural and historical heritage, had not escaped flows and tendencies of the Serbian-Yugoslav regime at the end of the 20th century. Following the abolition of Kosovo's autonomy by the Milosevic regime and the 1989 constitutional changes, they aimed to reduce the competences of Albanians in all areas of life. In this context, the reduction of competencies in the culture and museum heritage which means that Serbs and Montenegrins and any Albanian who supported constitutional changes loyal to the government were placed at the top of such institutions. The violent constitutional changes were also expressed in the leadership of the Museum of the Revolution and the Museum of Kosovo, replacing the professional Albanian cadres with those of the Serbian-Montenegrin nationality. Upon their arrival at the head of the institution, research and presentations of an Albanian national character were strictly forbidden, research and presentations of cultural and historical heritage were only of Serbian nationalist and chauvinistic character. The degradation and destruction of museum institutions begins here. The purpose of this work is not to describe the narrative of the situation at that time, but rather to shed light on this subject and to accurately reflect this sensitive period for the Museum of Revolution and museum activity in general.

**Keywords:** Cultural heritage, museum activities, exhibitions, collections, museums, exhibitions, exhibits, museology, archeology, history, ethnology, nature, degradation, destruction, etc.

### 1.1. Establishment of the Museum of Kosovo

The decision to establish the Kosovo Provincial Museum in Pristina was adopted by the former Provincial Council on May 5, 1947, (since Kosovo was then part of the Yugoslav federation). This decision is not preserved, but based on the documentation available in the Pristina Municipal Archive, it can be verified that the first director of the museum was Ilija Nikolic. Based on correspondence held by the museum director with various institutions of the government at that time and with the Ministry of Science and Culture of the Federal Republic of Yugoslavia, as well as with the Statistical Office, in column no.3, the year of its establishment of the Museum of Kosovo is recognized in 1947. Until 1950 the museum did not have its own premises and worked in the offices of the Council for Education and Culture. In this year, the small building of the former Metropolis in Pristina was given in use to the

museum, after which a modest space for exposure of the ethnographic material has been adapted.<sup>1</sup>



Fig.1. The building of the Museum of Kosovo

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<sup>1</sup> Shefki Stublla, *Komunikimi Muzeor I*, fq.43.

ZVEŠT ZA STATISTIKU I EVIDENCIJU  
 NR. *Spomenik - A.K.M.*  
 Obrazac Ku-2a  
 Odobrio SZSE-BP, 5700/L  
 od 13. decembra 1951 god.

STATISTIČKI LIST ZA MUZEJE (UMETNIČKE GALERIJE) I ZBIRKE  
 za 1951 godinu

1. Ime muzeja *Opština Kragujevac muzej*  
 2. Mesto *Kragujevac*  
 3. Godina osnivanja *1947*  
 4. Teritorija, delatnost *Opština Kragujevac - muzej*  
 5. Značaj, (savazni, rep. bližki, sreški, gradski, lokalni) *Opština*  
 6. Da li je muzej-zbirka: prirodjački, ekognasko-tehnički, društveno-istorijski, zav. Esajni ili umetnički *Opština Kragujevac - muzej*  
 6a. vrsta društveno-istoriskog muzeja (istorijski, NRB, vojni, gradova, arheološki, etnografski, pedagoški, sanitarini, pozorišni, masovjalni i kulturno-istorijski) *Opština Kragujevac - muzej*  
 7. Jesu li štampani vodiči, (da, ne) *ne*  
 8. Jesu li štampani katalog (da, ne) *ne*  
 9. Jesu li konzervatorsko-preparatorska radionica (da, ne) *ne*  
 10. Jesu li sopstvena ili tuđa zgrada *muzeja, zgrada*  
 11. Koje je godine podignute sopstvena zgrada  
 12. Površina prostora u m<sup>2</sup> - svega: *470 m<sup>2</sup>*  
 od toga: površina izloženih prostora: *441 m<sup>2</sup>*  
 površina depoa: *32 m<sup>2</sup>*  
 13. Muzej (umetnička galerija) - zbirka je izdela u ovom izveštajnom periodu: knjiga i brošura - broj .....; brojeva listova .....; brojeva časopisa .....

14. Predmeti po zbirkama

BROJ PREDMETA	P o z b i r k a								
	prirod- njačka	istoriska	kulturno- istoriska	arheo- loška	numizma- tička	etnografska	umet- nička	ostale	svega
Ukupno <i>918</i>		<i>173</i>	-	<i>263</i>	<i>60</i>	<i>412</i>	<i>10</i>		<i>918</i>
Od toga izloženih <i>286</i>		<i>72</i>	-	<i>39</i>	-	<i>173</i>	<i>3</i>		<i>286</i>

15. Ukupan broj posetilaca *1000*  
 16. Broj grupnih - kolektivnih poseta *4*  
 17. Osoblje

UKUPNO	B r o j o s o b l j a			
	o d t o g a			
	Stručno-naučno	stručno-tehničko	administrativno	ostale
<i>3</i>	<i>2</i>	-	-	<i>1</i>

18. Prihodi - rashodi

P r i h o d i			R a s h o d i					
po budžetu	ostalo	ukupno	lični	materijalni			ostalo	ukupno
				za otkup predmeta	drugi	svega		
-	-	-	<i>729.720</i>	<i>1.110.000</i>	<i>2.200.000</i>	<i>3.500.000</i>	-	<i>3.500.000</i>

Faksimil i listes statistikore e themelimit të Muzeut të Kosovës

Fig 2. Facsimile of the statistical list of the establishment of the Kosovo Museum (ASHK)

The Museum of Kosovo was first opened to the public in 1951. In Prishtina except Kosovo Museum, the Museum of Nature was established in Pristina in 1957, based on KAKM decision no.18 / 57-161. In 1959, a Section of the Workers' Movement was established in the Museum of Kosovo, which was transformed into a Museum of Revolution, in 1962, based on decision no. 26 / 61-711. On January 1, 1963 all museums are integrated into a complex provincial

museum, based on Decision No. 33 / 62-1293. In 1969, a Medieval Section was established in the Museum of Kosovo, while in 1970, the Museum of Kosovo was proclaimed as the native Museum. The Museum of Kosovo had the following professional sectors: the Sector of Medieval Archeology, Ethnography, History and Nature. In 1956 the Museum of Kosovo for the first time begins the publication of the Museum of Kosovo Bulletin, which is published once a year. The main building of the Museum of Kosovo is located in the old core of the city center, near the Assembly of the Republic of Kosovo. The building was built in 1889, with Austro-Hungarian architectural style, dedicated to the Ottoman military high command. Initially there were many difficulties, with lack of space, professional staff, but gradually, day by day began to move towards the path of personnel improvement. The Kosovo Museum began its professional activity with a small ethnographic collection, but day by day it began to enrich with other materials in the field of archeology, history and nature. The first archaeological excavations began in 1951 in Novobrd (Artana), in co-operation with the Archaeological Institute of the Serbian Academy of Sciences and Arts in Belgrade, the Institute for the Protection of Kosovo Cultural Monuments in Pristina, and the Belgrade National Museum.<sup>2</sup> In 1951, an exhibition for the first time was opened to the public, and a museum library, laboratory and carpentry workshop were also established this year. In addition to material research, collection, study, conservation, conservation, exposure, the Kosovo Museum began publishing its own newsletter in 1956 - Bulletin of the Kosovo Museum. In 1957 the museum had over 8500 exhibits, the archeology section had 5000 objects, the ethnographic 2000, the collection of frescos 25, the natural section 1000, and the National Liberation War collection with 500 objects, while the library had nearly 1600 books and magazines.

In 1977 the museum collected nearly 33,000 museum objects, of which 15,707 archaeological collections, 235 medieval, 4735 ethnological, 9072 history and 3,139 exhibits of natural collections.<sup>3</sup>

## 1.2. Establishment of the Museum of the Revolution

In 1981 by the Museum of Kosovo, the History Sector was founded the Museum of the Revolution of Nations and Nationalities of Kosovo. Its headquarters were the old Kosovo Library which was adapted for the needs of the Museum. This museum had three sectors: research, presentation and general administration. This museum mainly possessed exhibits from the period of the most recent history, mainly from the (LNC) period.<sup>4</sup> The Museum's activity at the Museum of the Revolution was multidimensional; it is important to note the valuable contribution to the ongoing artistic segment of the Museum of Art by professional collaborators of the Museum of the Revolution (for the preparation and presentation of the museum material) since its founding of this museum in 1981. From the founding until the closure of this museum, the professional collaborators (Prof. Fatmir Hoxha - sculptor and Prof. Osman Mezinolli - painter), respectively of the artistic sector, have made about 50 copies of paintings, sculptures, graphics, graphs and art maps. In the 10 paintings, the most characteristic are those of Fadil Hoxha, the leader of (NLW) in Kosovo, worked by Fatmir Hoxha, Boro and Ramiz Sadiku, by Osman Mezinolli and others. Among the 5 copies of sculptures, among the

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<sup>2</sup> Mr. Tefik Morina "Rrug e zhvillimit dhe prespektiva e Muzeut të Kosovës", Buletini i Muzeut të Kosovës XII " , 1974, Prishtinë

<sup>3</sup> Ibid

<sup>4</sup> Intervistë me Prof.dr. Riza Sadiku, me 10-06-2015, ish- ushtrues i detyrës së Drejtorit të Muzeut të Revolucionit prej muajit maj 1981- gusht, 1982.

most prominent are the sculptures of the figure of Ganimete Terbeshi, the Deçiç's War (Albanian-Montenegrin war), Tusk and Gheg (attack of partisan bravery, worked by Fatmir Haxhiu). The graphics are represented by 4 copies, while the graphics are about 20 copies. The most prominent among them are graphs on fertility, health, education, student enrollment, etc. The artistic maps were presented in 8 copies, the most characteristic of which was the map of the battle of Carraleva, the map of Pristina, in the context of war and so on. These maps were made from plank and sand-patterned materials of different colored stones and gramolines (worked by F. Hoxha. And O. Mezinolli.). All these evidenced works of art served to complete the historical exhibits that were opened during this time in the museum.<sup>5</sup>



Fig. 3. The building of the former Museum of Revolution, now the Kosovo Art Gallery

### 1.3. The beginning of the degradation of the Museum of the Revolution

The Constitutional Amendments of 1989 aimed at reducing the competencies of Albanians in all areas of life, both political, economic and social, as well as reducing their competences in culture and heritage. At the forefront of such institutions in the leading countries were Serbs and Montenegrins, and any Albanian who supported constitutional changes loyal to the government. Constitutional changes also came to light at the leadership of the Museum of the Revolution at the time, as they replaced Albanian director Shefki Stublla, and in turn appointed a worker of the Serbian National Museum of the Revolution, named Gordana Popovic.

Upon her arrival at the head of the institution, research and presentations of national character were severely interrupted. Cultural heritage research and presentations were of Serbian

<sup>5</sup> Dr. Sadik Krasniqi, Tezë Doktorature, "Trashëgimia Muzeale", fq. 68, Tiranë, 2018.

nationalist and chauvinistic character only.<sup>6</sup> As a result of the reflection of the current situation and the very sensitive situation that the people of Kosovo were going through, in defense of the constitution of 1974, such a situation had a direct impact on the Museum of Revolution as well. On this occasion, the staff of the Museum of the Revolution did not sit idly by in front of the difficult situation that Kosovo and its people were going through, in this context, the management and some staff of the professional staff of the Museum of the Revolution followed and took notes for all the events that took place at that time, collecting documents, took pictures, took various notes, and observed the actuality of the time. The barricading of Trepca miners in caves, whose demand was not to change the Constitution of 1974, a strike that lasted several days, was actualized not only in the former Yugoslavia, but also in Europe, many world media wrote, many suggested and visits to the highest levels of Yugoslavia to get out of the mine, but the miners were determined to fulfill their demands. After so much actualization of this event which was special and unheard of until then in Europe and beyond, one day the research sector of History operating within the Museum of Revolution, led by Riza Sadiku, took a stand to seek permission from the Museum and to visit the striking miners of Trepca. After making the request, approved by then Museum Director Shefki Stublla, the Museum's team led by Riza Sadiku, Mehmet Gjoshi and photographer Dilaver Pepa visited Trepca's striking miners in the caves of VII and IX Horizons. According to the (now deceased) Professor Riza Sadiku's evocation: "The meeting with the miners was very emotional, they were encouraged when they saw us, we had some short speeches where we mentioned, among other things, that the miners have a tradition of striking that have always protested at the right historical moments, here we have had some cases before World War II, when the workers of Trepca protested several times for the improvement of working conditions, which tradition you are continuing. After visiting both strikers' horizons, we took some photos and we were very friendly with them" added among other things Mr. Sadiku.<sup>7</sup>

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<sup>6</sup> Intervistë me Prof.dr. Riza Sadiku, me 10-06-2015, Këshilltar i lartë Muzeor

<sup>7</sup> Prof.dr. Riza Sadiku, me 10-06-2015





Fig. 4. Visit by the Revolution Museum team during the miners' strike in Trepca, which were against the constitutional changes of February 1989, (Dr. Riza Sadiku, Prof. Mehmet Gjoshi and photographer Dilaver Pepa).

The genocide perpetrated through violence on Albanian material and spiritual culture had reached a climax. In this context, on June 25, 1993, at the premises of the Museum of the Revolution in Pristina, an exhibition entitled "Genocide against Armenians 1915" was opened, an exhibition prepared and offered by several Serbian information and museum institutions, in collaboration with Armenian peer institutions. The purpose of the opening of this exhibition in Kosovo, according to Mehmet Gjoshi, was: "actualization of the Turkish-Muslim genocide against the Orthodox Armenians, alluding to the genocide of others over the Serb-Montenegrin people in the Balkans".

When it was first mentioned in the Museum's professional college that the exhibition in question would open on the premises of this institution, I asked the authorities at the Museum: what do we need such an exhibition, especially with such a title? Is it for the sake of calming the situation, or for the sake of aggravating it, the message of the exposition in question, when, as is well known, the peoples of Kosovo accuse the hegemony of other people of genocidal acts, though, as historically known, the Albanian people never in his history did he commit genocidal acts against other peoples, nor had any opportunity or purpose. What I have said about this exhibition is listed in the professional college meeting minutes. In the wake of the degradation of cultural heritage by the then Serbian-Yugoslav power, with particular emphasis on museum activity; On 15-10-1993, at 1 pm, at the premises of the Museum of the Revolution, another exhibition from Belgrade opened entitled "The Thessaloniki Front". At the opening were invited mainly Serbian-Montenegrin, which was quite normal under those occupying circumstances, especially the large number of military personalities, led by General Bojovic,

commander of the Pristina Corps. The opening was postponed for a few minutes, as the TVP team did not arrive, we were staying in the yard with the Albanian co-workers, near the cannons, and spontaneously followed the guests into the museum. One of the co-workers (operating before 1989, so he knew very well the incoming Serbs and Montenegrins) said that "most of the guests are members of the Serb chauvinistic mud, who currently act with flesh and soul against everything Albanian". With this confession cut from the diary of the Honorable Professor Mehmet Gjoshi, we can conclude, to what extent, the logic of Serb-dominated violence has reached all dimensions and segments of life, with particular emphasis on museum activity and of Albanian cultural heritage in general. Making constant efforts to eradicate and destroy everything of Albanian cultural and historical character. The best example to prove this is the opening of two exhibitions that were of no national character, but rather incited inter-ethnic hatred, which was still very fragile and on the verge of explosion.<sup>8</sup>

#### **1.4. Suppression of the Museum of the Revolution and the destruction of museum activity in the late 90's**

Prohibition of the exploration of the material and spiritual values of a people, the impossibility of presenting the true cultural and historical values of a nation, the systematic and planned destruction of the cultural-historical heritage of a captive people had reached zero. The purpose of the suppression of the Museum of the Revolution by the Milosevic regime in the late 1990s of XX century was intended to remove and alienate everything that is Albanian. In the Museum of the Revolution they were employed according to national structure, moreover there were Albanians, this institution was from the beginning in the eyes of the regime, as a nationalist, because within the possibilities, circumstances and realities of the time, research and presentation of culture and cultural heritage became more objective than the regime required, trying to highlight national symbols of partisan units and other national activists while presenting exhibitions. It should be noted that in an exhibition they also presented the Bujan Conference Resolution, which at one point foreseen the Union of Kosovo with Albania, which decision was taken during the Conference (1943-44). For this presentation, the activity of the Museum of the Revolution was criticized by the Serbian media in Pristina and Belgrade for promoting Albanian nationalism and identity through the presentation of such documents. The aforementioned activity of the Museum of the Revolution did not have a positive connotation of the Belgrade regime, like the Museum of Kosovo, which has always been dominated by Serbian spirit, therefore the Assembly of Serbia at the end of 1994 decided that the two Museums should at the provincial level to abolish and form a so-called Museum of Pristina, losing the element of citizenship. The decision of the Assembly of Serbia was implemented on March 7, 1995, in which case the Museum of Revolution was abolished, the exhibits which had been collected up to that time, without any special treatment, and with contempt were given to the Museum of Kosovo, now Pristina Museum. Only one worker was hired by Albanian professional workers, and some technicians and guards and a high school cashier, others were out of work, workers of other nationalities all remained at work.<sup>9</sup>

During this time many important museum materials have disappeared, such as memorials, and some lenses with memorials have disappeared. The memorial case of Mirko Merkić, a colonist from Terstenik in Drenica, chief of counter-espionage for the Eastern bloc, has disappeared,

<sup>8</sup> Mr. Mehmet Gjoshi Këshilltar i lartë Muzeor (pjesë nga ditari i tij personal) 14-10-1993.

<sup>9</sup> Dr.Riza Sadiku,Këshilltar i lartë Muzeor, 10-06-2015

who, despite the fact that he fought against Shaban Polluzha, highly values the latter's personality. He is one of the rare people who appreciate the generosity of the Albanian people. Meanwhile 4 more lenses with memorials of Alush Zariqi disappeared, where there were important data for 1941-1945. Upon the abolition of the Museum of Revolution on March 7, 1995, the state security authorities seized all of the exhibit weapons stored at the Museum of the Revolution.<sup>10</sup> Also, out of the total art collection it was in about 50 copies only in the Museum of the Revolution. During 1990 - 1992 - 1995, a large number of these artistic relics, among many others, were looted and destroyed by the regime of the time, when the head of this Museum was director Gordana Popovic from Gjilan.<sup>11</sup> From the three-dimensional exhibits taken from the former Museum of the Kosovo Revolution, at the time when Gordana Popovic was the director, from the representatives of the Secretariat of Internal Affairs of Kosovo on May 24, 1992, these exhibits were illustrated in the report the document presented below:

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<sup>10</sup> Mr..Mehmet Gjoshi Këshilltar i lartë muzeor, të dhënat i dha me datën 09-06-2015

<sup>11</sup> Dr. Sadik Krasniqi, Tezë Doktorature, “Trashëgimia Muzeale”, fq. 68, Tiranë, 2018.

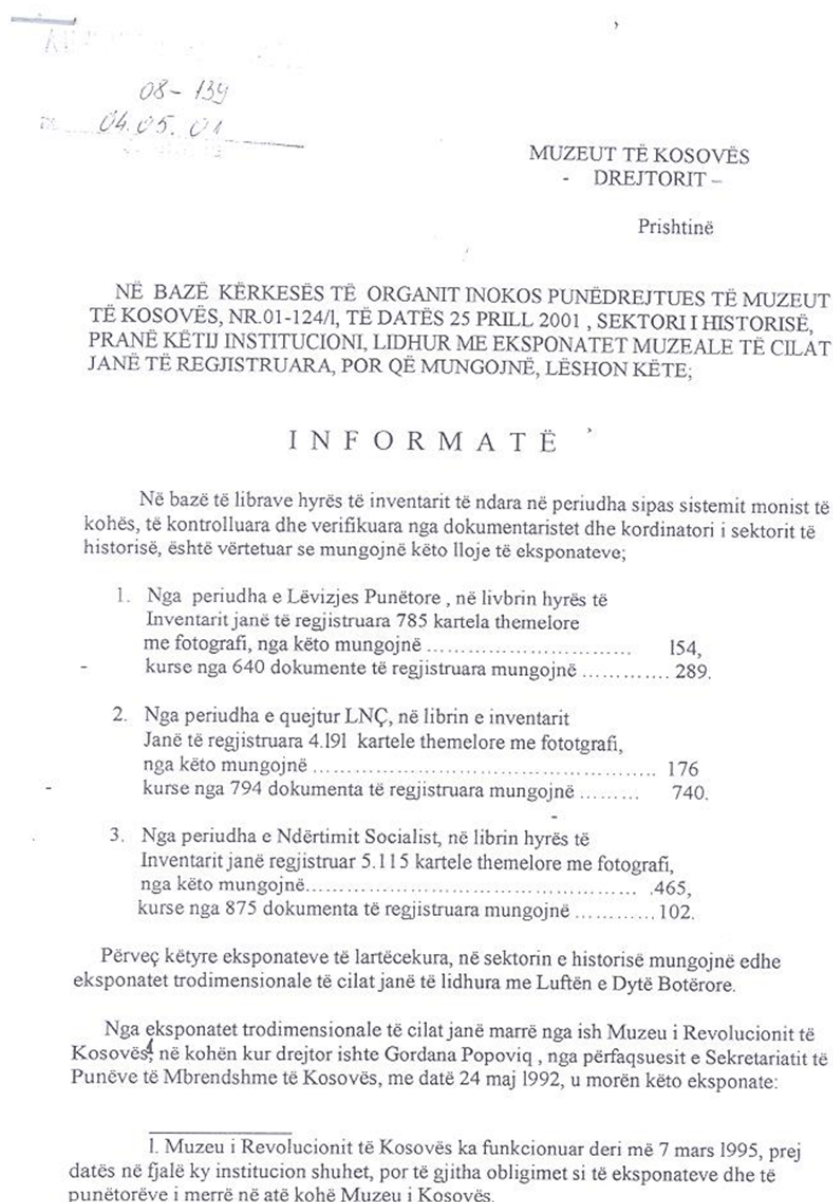


Fig. 5. Authentic document from the Museum of Kosovo, (Sector of History) prepared by Dr. Riza Sadiku upon request of the body "INOKOS" No. 01-124 / I, Nr. Protocol 08-139, 04-V-2001, which reflects the robbery and destruction of the Museum of Revolution

According to our records, since 1990 by the then regime, the exhibits are gradually being taken over from the Kosovo Museum and sent to Serbia. While in 1997-1999 more than 1,247 ethnological and archaeological exhibits were taken to Belgrade for an exhibition.<sup>12</sup>

Whereas, according to archaeologist Fatmir Peja, who was also one of the witnesses to the retrieve of exhibits from the Museum of Kosovo in reverse, it is said that the from the ethnology department has been taken the collection as; 13 crates full of different ethnological collections: jewelery, wood, textiles, etc. Whereas 644 archaeological objects were taken from archeology.<sup>13</sup>

According to sources from the history sector, a recapitulation of the missing exhibits in the sector shows the following order:<sup>14</sup>

1. Basic card with photos .....	795
2. Documents.....	1.131
3. Three-dimensional exhibits (original).....	43

<sup>12</sup> Iniciativa kosovare për stabilitet -IKS- Një e ardhme për të kaluarën e Prishtinës, Prishtinë 2006.

<sup>13</sup> Arkeologu Fatmir Peja, të dhënat i dha me 20.12.2010

<sup>14</sup> Dok. nga Muzeu i Kosovës, (Sektori i Historisë) i pregaditur nga Dr. Riza sadiku me kërkesë të organit “INOKOS” Nr.01-124/I, Nr. Protokollit 08-139, 04-V-2001.

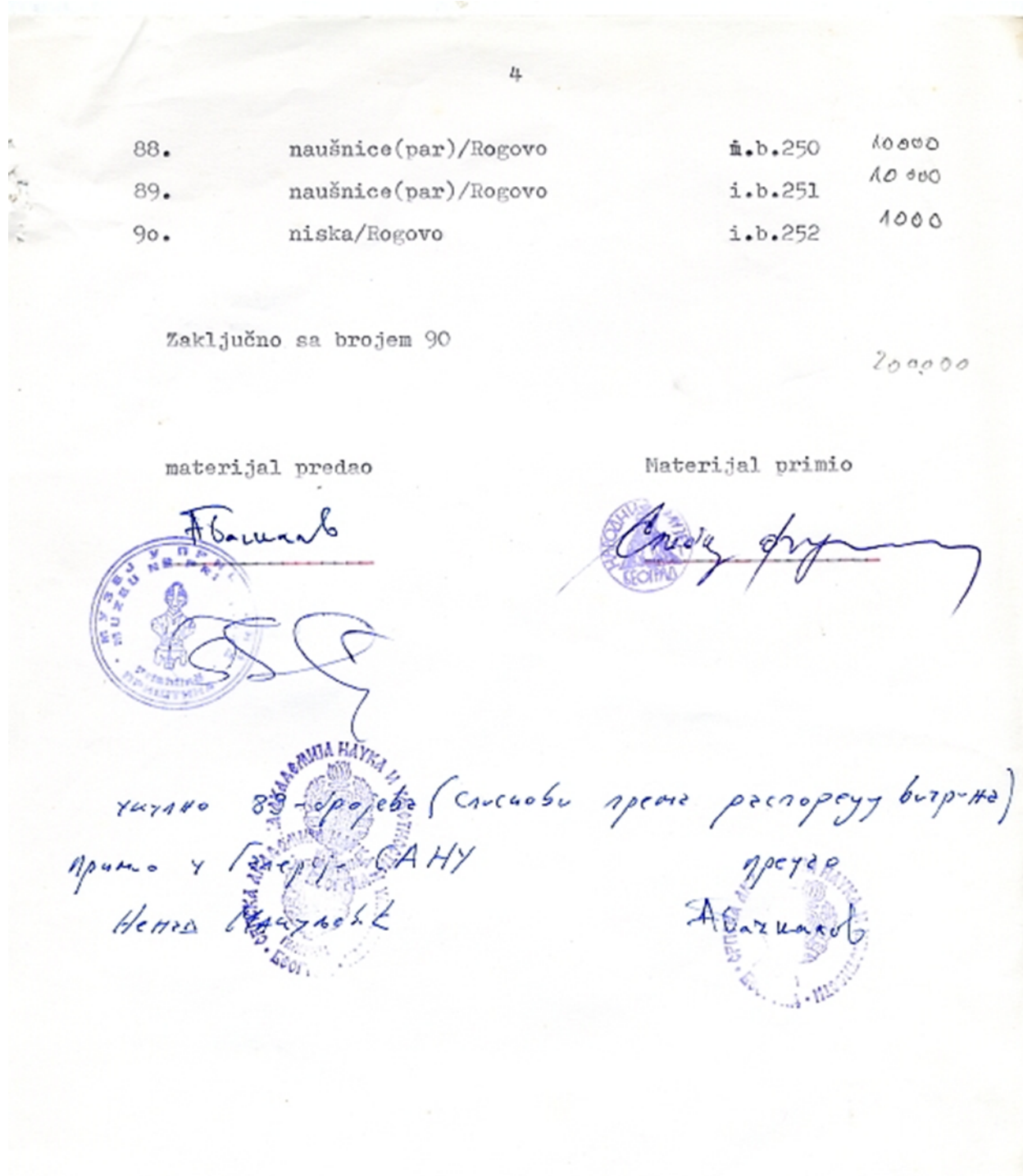


Fig.6. Original document borrowed from the archive of the Museum of Kosovo, where the Serbian side receives reversed exhibits in 1999, the exhibits belonged to the Rogovo region. Whereas from the collections of Kosovo museums during the last war (1998-1999), in January-March 1999, shortly before the NATO bombing, they were allegedly borrowed from the Serbs for a temporary exhibition entitled:



Fig.7. Photo-evidence of the destruction of the Museum of the Revolution

"Kosovo Archaeological Treasure", exhibited at the Gallery of the Serbian Academy of Sciences and Arts in Belgrade.<sup>15</sup> The archaeological collection consisted of 677 exhibits, and the Ethnology Treasury consisting of 571 exhibits totaling 1248 copies are borrowed for mobile ethnological exhibitions in the museums of Novi Sad, Kikinda, Subotica, Vershac and Belgrade. Now the archaeological collection is unjustly kept in the warehouses of the Popular Museum of Belgrade, while the ethnological collection in the warehouses of the Ethnological Museum in Belgrade.<sup>16</sup> Among these exhibits are some from the history section (among them the authentic document of the Bujan conference).<sup>17</sup> Of all these exhibits after the war with the mediation of the international community, the chief administrator of Kosovo, Mr. Michael

<sup>15</sup> Dr. Sadik Krasniqi, revista periodike 6 mujore, "Dardania", Nr/1 2018, fq. 102, Prishtinë

<sup>16</sup> Fatmir Peja, arkeolog, të dhënat i dha me datën 09.02.2011, Prishtinë

<sup>17</sup> Intervistë me dr. Sadik Krasniqi, (Këshilltar i lartë Muzeor) Shef i Seksionit të Historisë në Muzeun e Kosovës të dhënat i dha me 10-06-2018, Prishtinë

Steiner has returned from Serbia only the exhibit, "Goddess on the Throne". In this context, in the context of awareness raising of international opinion after the 1998/99 Kosovo war, a campaign was organized by the Kosovo Museum, entitled "Return", (follow the yellow line), organized by the former director of the Museum of Kosovo, Mr. Arber Hadri, the purpose of this campaign was to raise awareness of the international public to pressure Belgrade and return artifacts obtained before and during the war in Kosovo.<sup>18</sup>



Fig.7. As part of the "Return " campaign (follow the yellow line), organized by the former Director of the Museum of Kosovo, Mr. Arber Hadri, the aim of this campaign was to sensitize the international public to put pressure on Belgrade to return to Kosovo artifacts taken before and during the war, these are some of the artifacts (exhibits) that are unfortunately still in Belgrade

<sup>18</sup> Arbër Hadri, ish-drejtor i Muzeut të Kosovës, të dhënat i dha me datën, 12.06.2014



## Conclusion

In this paper, I have tried to provide facts and arguments to address the real situation in the field of museum activity in general, with particular emphasis on the Museum of the Revolution in particular, during the period 1989-1999. The paper relies on scientific materials, documents and archival materials, analyzed in terms of time and in the context of the events when they were written, but each time based on critical and scientific research analysis, which I obtained as auxiliary scientific historiographical sources, so I am convinced that such works can arouse even greater interest in researching this important cultural-historical theme, and in particular for the period from 1989-1999. The reason for dealing with this topic was to contribute a little in terms of treating this theme with a museum character and the confrontation and perils that this cultural heritage institution has experienced during this dark, or rather decadent, period, as in cultural heritage, museum, as well as in all segments of life in Kosovo. Even today, the Museum of Kosovo suffers the effects of the extreme degradation that the regime has suffered during the period in question. The Museum of Kosovo and the Museum of Revolution experienced the biggest blow to the development of museum activity during the period 1989-1999, since its formation. In support of predominantly written and oral historical sources, and in the field researched sources, we can conclude that the issue of Kosovo museum activity requires a much more professional and scientific approach, because the time of the period in which I am trying to identify problems in these cultural institutions, has been a period of decadence of cultural and historical heritage, etc. I think that the occupier's tendency to avoid whatever is Albanian has been very dimensional and discriminatory, and on the other hand, despite the destructive approach of the Serbian occupation power at the time, we must thank the professional staff of the Museum of the Revolution and of the Museum of Kosovo, which despite the existential problems that have been encountered during this time, have succeeded to some extent in becoming in various forms a strong opposition to the occupier. Some of them have even paid with leaving their jobs only to preserve our historical and national identity and heritage. As an illustration best speaks the factographic arguments which I have tried to present with this paper, that the Serbian government still holds thousands of exhibits taken before and during the 1999 war, whether archaeological, historical or ethnological. And in the end, I am aware that perhaps I was not even able to achieve the goal, because I need much more commitment, commitment to the period in question, and that in the future we need to take it more seriously.

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## TRENDS AND DETERMINANTS OF COLOMBIAN MIGRATION TO CHILE

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### Abstract

International news often give voice to Latin American migration aiming at Europe or especially the US, yet rarely do we hear about migration within the region. However, steadily increasing trend of intraregional migration has developed over the past decades, which has seen some Latin American countries – such as Colombia – issuing major outflows, while others – including Chile – has become regional migration-receiving countries. These changing migration processes fundamentally shape the societies and economies of Latin America.

Economic factors and internal conflicts have caused extensive emigration from Colombia, and with outflows growing, the volume to Chile has enlarged and the number of Colombians residing in Chile has increased sixfold within less than twenty years. Chile – in many aspects, being one of the most successful countries in Latin America – is chosen among Colombians, who want to enjoy a better quality of life, nevertheless, it is the objective of the study to deepen our understanding of the determining factors.

This article outlines trends in the volume and composition of Colombian outflows to Chile in the 21<sup>st</sup> century. The paper is dedicated to search for answers and explanations to questions such as: What forces drive Colombian migration and what attracts them in Chile? What are the main determinants of Colombian outflows to Chile? Understanding migratory behavior is an everlasting difficulty both for social sciences and economics, but available statistics on migration flows, surveys, Chilean legislation and further macro-data allow the analysis of migration trends that characterize Colombian emigration to Chile.

Globalization, political situations, income disparities and economic imbalances have all contributed to the currently increased movements of Colombians to Chile, posing challenges for both the origin and destination country.

**Keywords:** intraregional migration, determinants of migration, Latin America, Colombia, Chile

## 1. Introduction

### 1.1. International migration and regional relevance

International migration is a global phenomenon, and its role in the modern world is not limited to demographics anymore; it is a key issue for the economic, political and administrative agenda worldwide. Globalization, global warming, political and economic circumstances and

advances in transportation and communication all fuel migration, make its pattern more complex, raising high hopes and deep fears and reinforce its importance.

Migratory processes are reversible, meaning that countries of immigration can become countries of emigration, and nations that traditionally have sent out large numbers of migrants can convert to be net receivers. With regards to Latin America, the transformation into a region of out-migration has been slow but finally came to involve most countries, including Colombia, whereas Chile is one of the exceptions.

As to regional statistics, the migratory balance is negative by 11 million in Latin America (United Nations Population Division) and between 2010 and 2017 the global population of emigrants from Latin American-Caribbean nations grew by 7%. In 2017 about 37 million people from the region lived outside their country of birth. Indeed, in recent years, it is intra-regional migration that has been increasing and has become the dominant trend. Approximately 70% of immigration in South America is intra-regional. According to a survey from 2017 (IOM) measuring global migration potential, 13% of the global adult population lives in Latin America, who wants to migrate abroad. 4.4 million from South America have plans to leave and 1.7 million are preparing to do so. In this survey, Colombia was in the top 20 countries (13<sup>th</sup>) and 1<sup>st</sup> from the region with the highest number of adults planning or preparing to leave the country.

Researching the topic is just in the right historical moment since in general public opinion is increasingly interested in Latin American matters, whether they are positive, like the peace talks in Colombia, or negative, like the Chilean protests. And along these lines, as a cause and consequence of these circumstances arises the question of migration within and beyond the region.

## **1.2. Research topic, goal and methodology**

This article outlines trends in the volume and composition of Colombian outflows to Chile in the 21<sup>st</sup> century. The paper is dedicated to search for answers and explanations to questions such as: What forces drive Colombian migration and what attracts them in Chile? What are the main determinants of Colombian outflows to Chile?

The objective is to look through the two country profiles and detect what attractiveness and deficiencies they have in a macro perspective and assess whether these figures would result in migration from one country to the other. This appeal will bring the application of push and pull factors into analysis. Available statistics on migration flows, surveys, Chilean legislation, and further macro-data allow the study of migration trends that characterize Colombian emigration to Chile.

## **2. Country profiles**

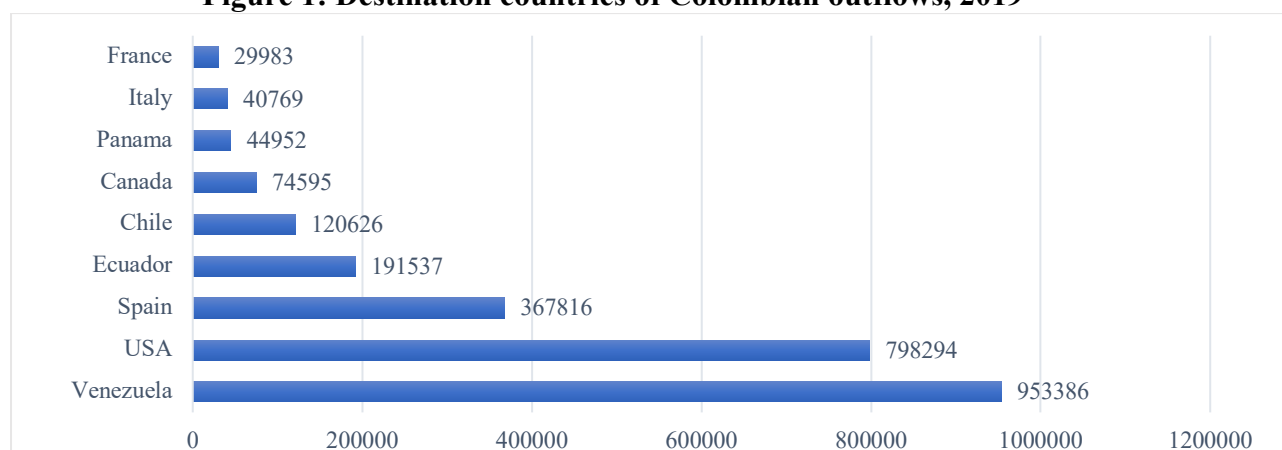
### **2.1. Colombia**

Colombia was a Spanish colony, currently a presidential republic with a population of over 46 million, which is the second most populous Spanish-speaking state after Mexico. After gaining its independence, several multiplayer civil wars took place in the region during the 19<sup>th</sup> and 20<sup>th</sup> century, which is one of the principal reasons for the high rate of emigration. The long-term question is whether the volume of outflows will decrease for as much as Colombia by now is a developing country with favorable long-term growth prospects, one of the leading states in the region, NATO's global partner, and is conducting a successful peace process. Yet

the latter is not finished and the consequences of the Venezuelan crisis have also put a huge burden on the country being an issuing state and a transit country in the same time.

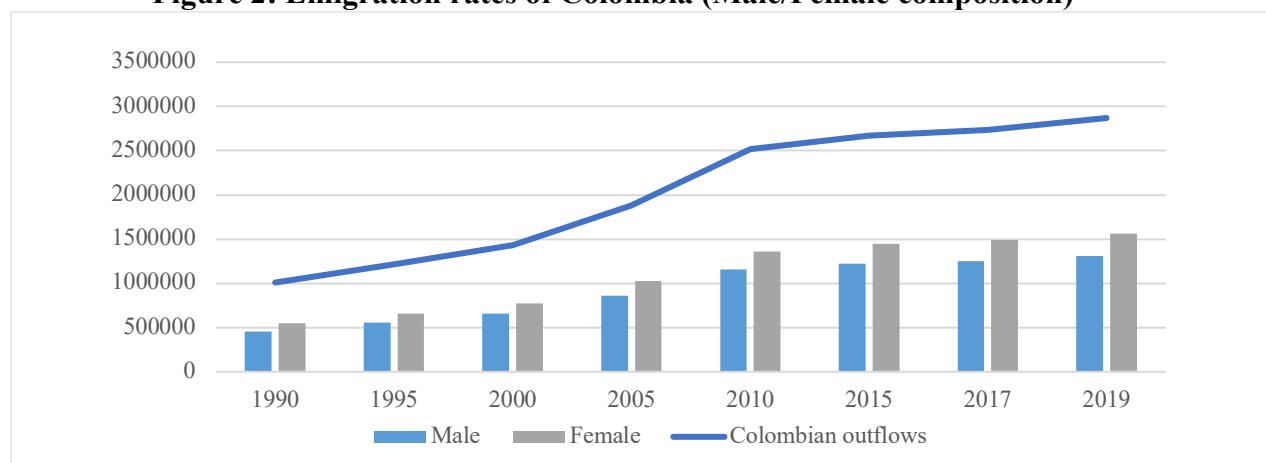
Three fundamental and clear migratory processes can be specified that characterize the movements of the region lately: Interregional migration, North-South migration and Transatlantic migration to the European OECD countries. According to the most preferred destinations by Colombians, the list has been steady in the last two decades. The highest rates of the outflows went to bordering Venezuela ever since the beginning of the 60's, choosing the oil-rich neighbor that offered a chance at work and peace, however, figures have drastically changed since the Venezuelan crises escalated and the vast majority of Venezuelan emigrants are now hosted in Colombia, accounting for some 1.6 million in 2020 (UNHCR). In absolute terms, the United States has been a principal destination of migrants from Colombia. Emigration to Spain, the ex-colonial power has emerged from the beginning of the 21<sup>st</sup> century, however, the global crises of 2008 hit the Iberian country drastically, thus immigration decreased. Besides Spain, Italy and France are preferred from the European OECD countries. With respect to intraregional patterns, besides Venezuela, Ecuador, Chile, and Panama need to be mentioned – Chile exceeding Panama in the number of Colombian immigrants by 2019 – latest figures.

**Figure 1: Destination countries of Colombian outflows, 2019**



*Source: UN Statistics, Population Division, International Migration, own compilation*

The number of emigrants from Colombia has almost doubled in the last two decades, thus according to the latest published data, Colombia has 2,869,032 emigrants, representing 5.76% of its population (see Figure 2), however many more are planning to leave the country. An important element to highlight the current immigration in Chile is its feminization (Baeza 2019). Concerning the gender balance, Colombian emigration is dominated by women.

**Figure 2: Emigration rates of Colombia (Male/Female composition)**

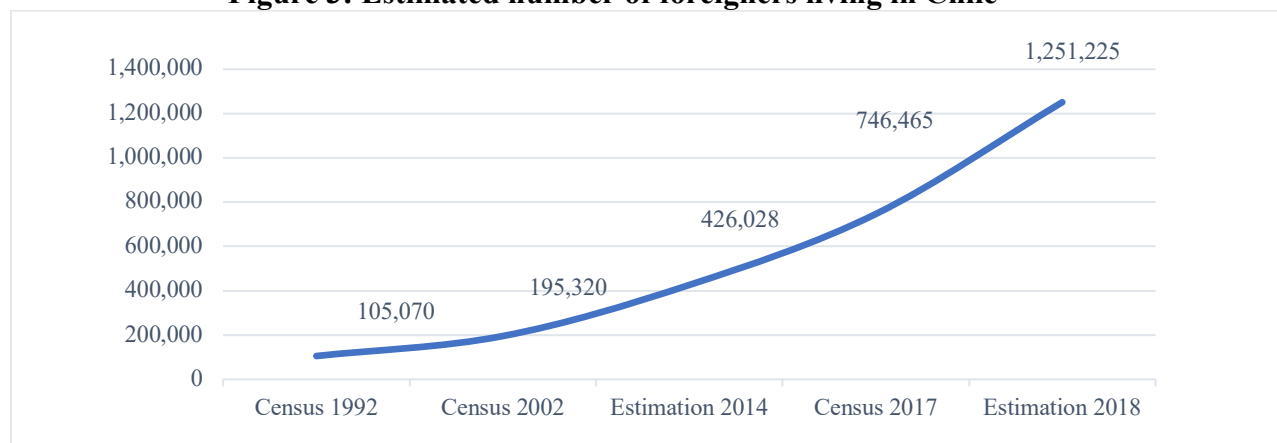
Source: UN Statistics, Population Division, International Migration, own compilation

The net migration of Colombia has been negative for most of its contemporary history. Yet figures of different institutions are not the same. The CIA World Factbook shows a huge drop in the number of people leaving the country after 2009 as a consequence of the recession that directly affected Colombia (-0,68 migrant/1 000 population). Some sizable volume of emigration went to Chile. After 2010 rates produced a slight recovery. On the other hand, UN Statistics and projections indicate the huge Venezuelan influx in the country, with net migration turning positive for the first time in long history (rates reach +4.16 in 2018). However, this figure does not mean emigration decreases, nor that flows would decline towards Chile.

## 2.2. Chile

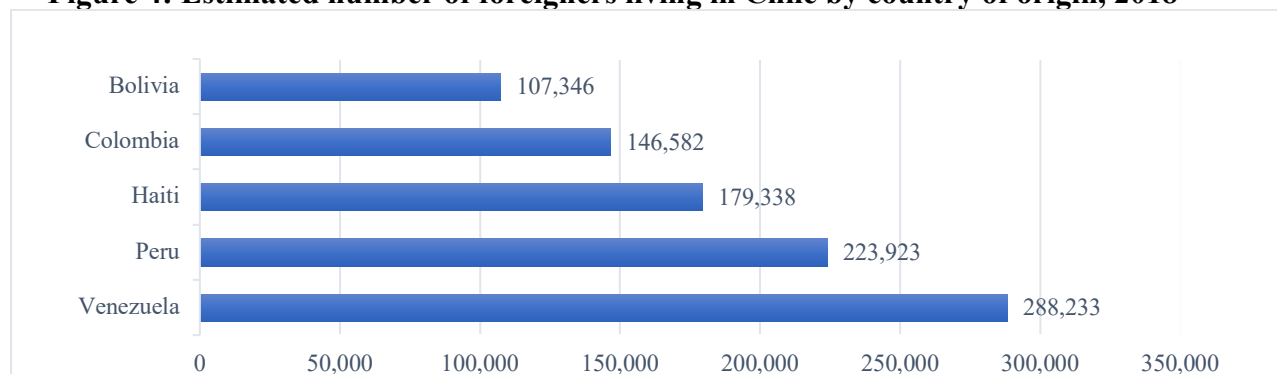
The modern sovereign state of Chile is undoubtedly among Latin America's most economically and socially stable and prosperous nations, with a population of 18,828,525 people as of 2018 (INE). In fact, the most important economic indicators are outstanding in the region, being a high-income economy with high living standards.

Following the country's emergence from dictatorship in 1990, the foreign-born population started to increase, and the country has undergone a substantial change concerning migration as it has shifted from being a migrant sender to a regional destination. Predominantly European-descent Chile has also grown racially diverse, as the origins have shifted. According to a joint estimate by the National Statistics Institute of Chile (INE) and the Chilean Immigration Office (DEM) together with census data, the number of foreigners in the country has increased from 105,070 in 1992 to 195,320 recorded in 2002, and the figure was 746,465 in 2017. This was steadily increasing, and according to official statistics, the estimated number of foreigners living in Chile reached 1,251,225 on December 31, 2018 (see Figure 3), of which approximately 300,000 were illegal immigrants. The proportion of foreigners living in Chile reached 6.6% (INE 2018), the highest in the region. It is worth comparing with other countries: Argentina 4.9%, Ecuador 2.4%, Brazil or Colombia 0.4% (El Mercurio 2019). Statistics will keep on changing due to the mass emigration of Venezuelans. Chile is concerned with the question of whether Venezuelans already resided in Colombia will actually stay in Colombia or rather traverse the country and proceed to the South.

**Figure 3: Estimated number of foreigners living in Chile**

Source: Chilean Immigration Office and National Statistics Institute of Chile (INE), 2018, own compilation

According to available data in Chile, nearly 60% of immigrants are between 20 and 39 years old. The largest volumes come from five countries, in this order: Venezuela, Peru, Haiti, Colombia and Bolivia (see Figure 4).

**Figure 4: Estimated number of foreigners living in Chile by country of origin, 2018**

Source: Chilean Immigration Office (DEM) and National Statistics Institute of Chile (INE), 2018, own compilation

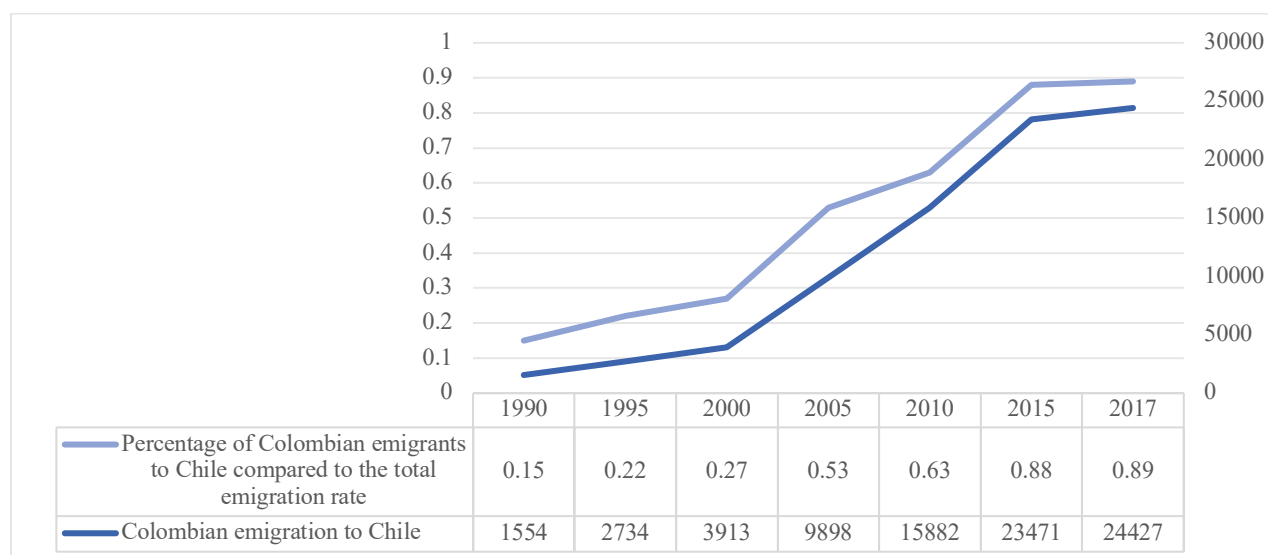
Statistics show that the net migration of Chile has been rather positive in the 21<sup>st</sup> century and its rates have clearly started to increase since 2011 reaching +6.024 by 2018. However, current matters in the country might turn the balance quite drastically, which is also suggested by the UN projections forecasting -3.75 migrant/1000 people by 2023.

### 3. Colombian emigration to Chile vs Chilean immigration of Colombian nationals

Examining migration numbers can be done from two sides. Either we look at the Colombian emigration statistics or we consider the Chilean immigration figures. Figure 5 shows that Colombian outflows have started growing towards Chile from 2000 with a constant increase

ever since. The percentage of the emigrants to Chile compared to the total emigration rate of Colombian nationals is relatively low (0.89% in 2017), nevertheless the number of visa applications in Chile present higher rates of immigration of Colombian nationals. Between 2005<sup>1</sup> and 2018 altogether 263,476 Colombians were applying for a temporary visa from the Chilean migration office (see Figure 6), however, compared to the estimated numbers of Colombian nationals in Chile (previous figure: 146,582 as of 2018) it is presumable that the rest are residing illegally or have not accomplished their dream in Chile thus have returned to Colombia or to other destinations. Another outstanding process is – as was suggested before – the feminization of migration, which is very much noticeable in the case of Colombian emigrants (Fernández et al. 2020), women mostly working in the service and household sectors. Labor market was similar in Spain some years ago: domestic service as an employment niche for immigrant women, became the main route of entry for Latin American immigration (Oso-Martínez 2008).

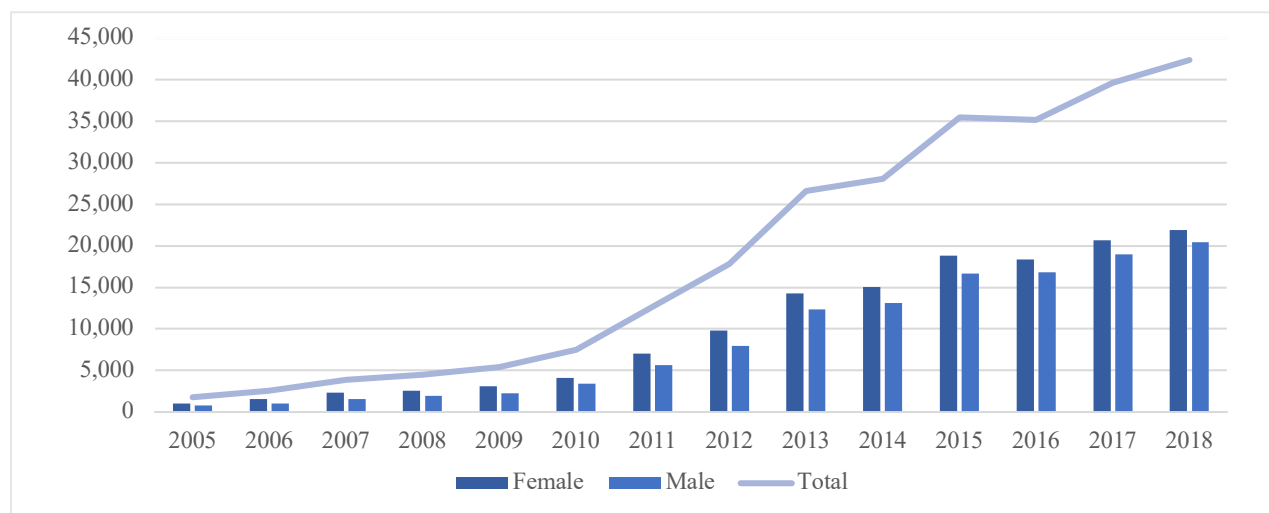
**Figure 5: Colombian migration rate to Chile and its percentage of total Colombian emigration rate**



Source: UN Statistics, Population Division, International Migration, own compilation

<sup>1</sup> Statistics are available from 2005.



**Figure 6: Temporary visa: Colombians in Chile (Female/Male)**

*Source: Chilean Immigration Office (DEM), own compilation*

#### **4. Push and pull factors as determinants of migration decision - attractiveness and deficiencies of Colombia and Chile**

According to the classic Push and Pull theory, (Ravenstein 1885; Lee 1966) migration occurs under the influence of the following factors: potential migrants are motivated by 'pull' factors that they find attractive in the country of destination, whereas, in contrast, the repulsive 'push' factors in their home country encourage them to emigrate. What motivates people to move? *"Indeed, since we can never specify the exact set of factors which impels or prohibits migration for given person, we can, in general, only set forth a few which seem of special importance"* (Lee 1966:48). The various socio-economic, political, cultural, sometimes environmental factors identified by the push-pull model are assumed to influence migrants to move from one place to another, internationally to one country to another country. In this respect, there are significant differences between the factors associated with the area of origin and those associated with the area of destination. As a basic premise of the theory is that the combinations of push and pull factors would then determine the size and direction of flows.

Based on Lee, when examining the causes of migration, it is important to take into account as many determinants – push and pull – as possible both in the destination and origin countries. The push and pull theory in this case is tested on Colombia and Chile. Five categories were identified for the determinants of migration: political, economic, social, cultural and spatial (Jennissen 2004). In order to measure the flows from one country to the other, indicators were chosen under each category. It should be clarified that such macro-indicators are often not directly associated with migration but accurately describe the attractiveness and deficiencies of the countries from the perspective of migrants within a particular political, economic, social, cultural and spatial context, as follows.



Instead of presenting each table of comparison, the chapter will offer the most relevant details of the statistics and the development of the specific indicators.

#### 4.1. Political determinants

The political situation in a receiving or destination country exercise a significant influence on people's migration decisions. Conflicts, insecurity, poor governance, lack of political freedom, corruption or human rights abuses can all act as push factors, and the worthier conditions in the destination country can widely attract migrants. Indeed, Colombia always had somewhat weaker indicators in this respect than Chile, according to the followings:

Concerning the political measure of *rule of law*, Chile has continually reached higher rates – average of 1.28 [2000-2018]; (-2.5 weak; 2.5 strong) – for the indicator, which captures perceptions of the extent to which people have confidence in the rules of society, particularly the quality of contract enforcement, property rights, the police and courts, as well as the likelihood of crime and violence. Colombia, on the other hand, has been in negative terms – drifting between -0.9 and -0.3 – undoubtedly due to political conflicts and civil strife.

The index of *political stability* in Colombia has always been negative due to its violent history and civil wars, indicating a high likelihood of destabilization, politically-motivated violence and terrorism in the country. The average value has been -1.54 [2000-2018] (-2.5 weak; 2.5 strong). Meanwhile, in Chile, the perception of political stability is stronger, with the lowest of 0.33 and the highest of 1.09 in the given period. However, this figure has worsened in recent years – see the latest protest for instance as a signal for political instability. Presumably, Colombian emigrants leaving to Chile believe to find better governance there.

Similarly to political stability, the scale of corruption – *corruption perception* – is an indicator concerning good governance. Latin American countries, in general, have considerable problems with the illegitimate use of public power. Uruguay and Chile are exceptions in the region. Uruguay ranked 23<sup>st</sup>, Chile 27<sup>th</sup> in Transparency International in 2018, whereas France figured 21<sup>st</sup>, Spain 41<sup>st</sup>, and Colombia 99<sup>th</sup>. Corruption in Colombia thus indeed seems to be a push determinant of migration as people being disappointed, expect to perceive less abuse of power from authorities in Chile with more transparent and forthright governance.

*International relations* and regional integrations intensify migration between member states. Regional integrations are quite common in Latin America, there has even been an oversupply recently (Soltész 2011). CELAC, OAS and ALADI are examples of intergovernmental organizations that include both Colombia and Chile.

The two countries, throughout their history, have signed a large number of bilateral treaties of various kinds from MoU on Strategic Partnership; Free Trade Agreement; Social Security

Agreement; to Agreement to avoid double taxation too, but one to highlight from a migration point is the Recognition of professional qualifications by Chilean authorities<sup>2</sup>. It allows finding a professional job more effectively with a recognized university degree, besides the high salaries and living standards that are the primary magnets attracting professional migrants (Durand-Massey 2010).

#### 4.2. Economic determinants

The economic approach to migration analyzes the main economic determinants influencing migration, which factors could be the largest motivators that drive people (Gross and Schmitt 2010; Taylor 2006) since people often move in search of better economic opportunities; more importantly due to (prospects of) higher wages, more or better job opportunities as well as for the potential for improved standard of living. Is Chile economically attractive for Colombians?

One rather simple theoretical explanation for the migration trends is the disparities in **GDP per capita**. Both countries show pleasant development of their GDP (PPP), but in fact Chile has always shown higher rates (eg.: 2000: Chile: US\$ 14241.16, Colombia: US\$ 8413.22; 2010: Chile: US\$ 19363.22, Colombia: US\$ 10956.95 or 2018: Chile: US\$ 22873.81, Colombia: US\$ 13321.33). Both Colombia and Chile show constant – except in the years of global crises and great recession – and visible growth since 2000. Also, having a look at economic growth and prospects, both countries display ample growth – Chile: 4.02; Colombia: 2.66 (World Bank 2018) – and economists detect development for the countries, but of course depending on several factors under transformation.

Early migration theories and their posterior versions (Smith's 1776; Hicks 1932; Shields and Shields 1989), as well as the neoclassic or Harris-Todaro approach argue, differences in real income or expected income drive the supply of migration in most cases. Differences in net economic advantages, particularly differences in wages are often considered to be the main causes of migration. As anticipated, Chile has higher **real wages**, but 'only' since 2008, when after the world crises Colombia departed with a more modest increase – by 2018 Colombia: US\$ 108.2; Chile: 120.5 (Cepal 2018). The matter of the fact is that migration is often determined by expected rather than actual earnings, but indeed, Chile is a country that attracts professional migrants by offering comparatively high salaries (Durand-Massey 2010).

When high **unemployment rates** prevail, people consider going abroad, where more job opportunities are available. Unemployment rates of the region are not low in general, but developments are seen in most countries. A notable example is Colombia, where in 2000 the unemployment rate was 20.5%, while by 2018 it dropped to 9.19%. As of Chile, its lowest rate dates back to 2013 with 6.21%, but by 2018 it increased to 7.43% – although still lower than in Colombia (World Bank 2018). It must be taken into account that the proportion of people working in the informal economy is high.

As for pull factors, **foreign-born employment rate** might be more essential for immigrants than unemployment rates in general. In fact, foreign-born employment is exceptionally high in Chile; 76.9% in 2018, 5<sup>th</sup> after Iceland, Czech Republic, Israel and New Zealand, apparently higher than OECD average: 68,7%. In fact, employment rate of foreigners is higher than of locals, the difference with native-born employment is +16.7%, which is the 1<sup>st</sup> highest according to OECD (2018), while 2<sup>nd</sup> is Israel (+12.1%) and 3<sup>rd</sup> is Luxembourg (+9.6%). Contrary to the study of Dustmann (2016), Chile does not receive immigrants with the lowest level of education. Immigrants to Chile with 18 years or more have higher educational levels

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<sup>2</sup> Reconocimiento de Estudios de Educación Superior en los Tratados Internacionales vigentes en Chile

than Chilean population and they have a more active orientation towards the labor market than native ones (Baeza 2019). Nevertheless, the Labor Code of Chile (Art. 19 y 20) determines the proportion of foreigners on a min. 85% of Chilean citizens, in case of more than 25 employees work for the same company.

Definitely, we are seeing a strong growth in *remittances* at a regional level, experiencing nearly 10% growth in 2018, one of the largest growth rates in the past 10 years (Orozco 2019). UN statistics recognize a clear increase concerning Colombian remittances from Chile. Colombian National Bank records even higher amounts: US\$ 394.7 million as of 2018 – tripled in the last 5 years (2013: US\$ 121 million). Two main factors explain such a boost in magnitude: first, obviously, as emigration from the country is increasing, remittances rise, and second, Venezuelan migration referring to Venezuelan migrants in transit or temporary stay receiving remittances in Colombia. Remittance flows are increasingly important for the Colombian economy – as of 2018 accounted for 1.92% of GDP (World Bank).

### 4.3. Social determinants

Oftentimes, if the fundamental causes of migration are not linked to economic or political factors, the question arises how to explain ongoing migration when wage and development differentials or recruitment policies cease to exist. According to the network concepts such as migration system theory, the explanation can be the existence of a diaspora or networks, which are likely to influence the decisions of migrants when they choose their destinations (Dustmann and Glitz 2005). Furthermore, inequality, social insecurity, and low welfare spending are examples of crucial origin-country determinants of migration (Ravlik 2014).

Inequality is very high in the region. Colombia and Chile are no exceptions. They figure in the *GINI index*, the classical measurement of differences in a society, with similar rates: Colombia: 49.4; Chile: 46.6 (0= perfect equality; 100= perfect inequality) (World Bank 2017).

While inequality is high in both countries, in terms of *poverty ratio*, Chile presents prosperous figures thus coming to be a popular destination for many migrants in the region. Whereas in Colombia 49.7% of the population lives below the poverty line, in Chile the rates were 8.6 (World Bank 2017). For comparison, Mexico produced the highest rates with 43.6% (2016) and Uruguay the lowest 7.9% (2017).

The *Human Development Index* (HDI) is a composite measure including life expectancy, educational attainment, and income level, aiming to measure life quality. Besides a fine upturn – which is a global trend – Colombia has not reached the Chilean levels yet but is not far away: 0.76 vs. 0.85 in 2018 (UN 2018).

The *stock of foreign-born population* – not exclusively the presence of the same nationals but in general – influence migrants' decision when they choose their destinations. This indicator rather acts as a pull factor, and Chile is a good example, where 195.320 foreigners were registered in 2002 and by 2018 the numbers increased to 1,251,225 (INE 2018)<sup>3</sup>. The existence of migrant networks, which often evolve into institutional frameworks help to explain why other theories would not work. It is particularly the diaspora that influences the migration flows and their volumes.

Of course, people consider migration based on their *safety*, thus poor safety circumstances as high *rates of crime* might negatively impact the directions and volumes of migration. With a

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<sup>3</sup> OECD Statistics also show a great increase, but their numbers are lower due to different data collection methods.

worsening crisis in Venezuela, dark days in Nicaragua, the fragile peace process in Colombia, new governments and new ideas in Brazil, Mexico and beyond, 2018 was a year with depressing statistics on homicide rates for the region (Insight Crimes 2018). Chile was acknowledged with the lowest homicide rates in Latin America and the Caribbean (2.7/100,000 people), while Colombia – due to the fact that the country saw an increase and diversification of criminal groups recently – was listed with 25 homicide rates/100,000 people.

#### 4.4. Cultural determinants

The works of Wallerstein (1974), Kritiz, Lim and Zlotnik (1992) argue that international migration does not occur randomly but usually takes place between countries that have close historical, cultural or economic ties. In fact, links between the origin and destination countries are not solely material, but historical, cultural and linguistic.

An extensive literature shows that both fluency in the destination language and the ability to learn it

quickly are key to the successful transfer of existing human capital to the destination countries' labor markets (Dustmann-Fabbri 2003; Durand-Massey 2010; Dustmann-Schönberg-Stuhler 2016). A *common language* unburdens migrants' decisions. Spanish language, as well as the Christian religion have a facilitating role – together with the increased barriers to migrate to Europe and the United States – in leading migrants to prefer Chile (Gissi-Pinto-Rodríguez 2019).

*Common historical background* can assist as a linkage between countries, resulting in regular migratory flows. Migratory dynamics permit identifying postcolonial ties that might be an important variable to be considered – referring to the Spanish colonial heritage of Colombia and Chile. However, the two cultures are actually not similar. Chilean society is often described as the opposite of Caribbean culture: considered cold and unfriendly. This is due, among other things, to the centuries-long isolation of Chile, which is bordered by the desert and the Andes (Gissi-Pinto-Rodríguez 2019).

An interesting approach by *Hofstede dimensions*, which views migration as a rational calculation made by individuals, is the model of national culture consisting of six dimensions that express the degree to which the cultures differ or resemble. Without going into analysis, the two countries quite much resemble, of course, it is true for many of the nations in the region, but this indicator can be influential when people have to choose from a regional or a transatlantic destination.

#### 4.5. Spacial determinants

The question of how far migrants travel has been the focus of the classical migration studies since Ravenstein's Laws of Migration (1885). Using distance as a proxy for migration costs (gravity model; Zipf 1946) points out that the greater the distance traveled by migrants is, the higher the monetary costs of migration are, such as transportation expenses, food, and lodging costs for oneself and one's family during the move. With regards to *geographic distance*, Colombia and Chile are not neighbouring countries, which is not a deterrent, and might even benefit migration for the lack of border conflicts. In relatively speaking, they are not far from each other, but the distance might act as an intervening obstacle.

There are several possibilities of *transportation* from Colombia to Chile as people can travel by road and by air. When moving, people often mix these transportations based on cost and suitability. Focusing on flights and their frequencies the total flight duration from Bogota,

Colombia to Santiago de Chile takes *5 hours, 45 minutes*. Here we do not have the opportunity to include monetary costs, but again, it certainly can act as an obstacle.

## 5. Conclusions

With the intensified intra-regional migration trend, the 21<sup>st</sup> century saw decisive volumes from Colombia to Chile. The importance of the Colombian community not only comes from its number but especially from its growing trend.

Looking through the two country profiles, such differences and disparities are indicated that suggest the entry of political, economic and social determinants – acting as push and pull factors –, and cultural and spatial determinants – basically pull factors – in migration decisions. The chosen macro-economic indicators guide us to understand the motivations driving migration, and allow presenting the behavior of international mobility, namely that in many respects Chile happens to be commonly attractive for Colombians and is considered to be a rational choice of destination.

Colombians are mainly working in the service, household sectors, and HoReCa industry<sup>4</sup>. The demand for workers in the service sector is one of the attractive factors that have made Santiago a relevant destination for immigrants in the region (Baeza 2019). Colombian immigrants are largely concentrated in the Metropolitan Region, 61%, and in the Antofagasta Region, 12.4% (DEM 2017). According to Duran and Massey (2010), this is a ‘city-directed migration’, which comes in two varieties: professional and unskilled. Migrants with technical or professional training typically locate in capital cities and generally travel as individuals in search of opportunities for education, work, or professional development. The process of Colombian integration into the Chilean society is diverse as a consequence of prejudices, racial heterogeneity, sexualization of women and differences in their socioeconomic position (DEM 2017).

Implication concerning the region suggests that the interest in migration will keep expanding thus posing new challenges to the respected authorities. The emigration of Colombians is of such magnitude that it has begun to grab the attention of governments, to the point that special programs have been created to assist them, such as the ‘Colombia Nos Une’ or the ‘Colombian Red Caldas’. On the other hand, there has been a speck of politicization of immigration in Chile becoming aware of the fact that the 1975 migration law was not designed for 21<sup>st</sup> century immigration.

Concerning future prospects, both countries are facing decisive issues. The new Colombian government has to address security challenges that includes the implementation of the peace process between the state and the guerrillas, along with strengthening political stability (Bács - Hegedűs 2020), which measures can reduce migration flows from Colombia to Chile. The opposite can happen if the economic and political crisis in Venezuela – the most preferred destinations of Colombian – further enhances, and Colombian emigrants choose other destinations, among them, like enough Chile. Projections about Chile suggest that national public unrest might break immigration trends and volumes.

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<sup>4</sup> Hotel/Restaurant/Café

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## THE EFFECT OF PRODUCT PLACEMENT ON CONSUMER BEHAVIOUR

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### Abstract

Product placement is recently becoming one of the most popular tool of marketing communication among enterprises. This is why the attention of marketing specialists increasingly aims to the new and modern marketing tools, notably to the product placement and its usage. Therefore, the product placement attracts the attention of scientific researchers and managers as well. The main aim of this paper is to identify the effects of product placement on consumer behaviour through different perspectives. Notably, we focused our attention on revealing effect of product placement prominence on consumer brand image perception or examination of consumer brand recall ability in connection with program liking and frequency of watching. Within our research was verified and confirmed the assumption that prominent product placement is more remembered and recalled by consumers than subtle. In addition, our research describes differences between the ability of free and aided brand recall. According to the results there were formulated several managerial implications. This paper contains partial results of complex research focused on investigating the effect of product placement on consumer behaviour.

**Key words:** product placement, brand recall, product placement prominence, brand image, customer behavior

### Introduction

As the preferences of customers are changing, also the way of advertising has modified, because it was and will be more and more difficult for marketers to reach and attract consumers via the traditional ways of advertising. This is why the attention of marketing specialists increasingly aims to the new and modern marketing tools, notably to the product placement and its usage. Therefore, we found interesting to investigate usage of product placement in Slovak conditions and to reveal distinctive aspects such as its influence on consumer brand recall ability, changes in consumer preference or brand perception. Through our research we have also analysed prominence of product placement and brand image perception. Following study presents outcomes of primary research conducted on research sample of Slovak students.

### Theoretical Background of Product Placement

Taking a look at issue of product placement in general, we may find several distinctive opinions about product placement, its usage and contributions. However, in prior we start to talk about this marketing tool and its characteristics, we consider as important to determine its

position in marketing mix at first. In general, marketing mix is perceived as a set of marketing tools of tactical character that are utilized by businesses for the purpose of adapting their supply in conformity to their target customers and markets (Philip Kotler, 2007). From this reason, as a marketing mix we can consider almost everything that enables business to affect a demand for offered products and services. Mostly we are talking about marketing mix through its four crucial elements such as product, price, place and promotion (referred to 4P of Marketing). Therefore, aim of managers is to adjust and to fit all elements according to the current situation on a market (Reid and Bojanic, 2009).

Based on a characteristic of marketing mix in general, looking back at the product placement, it is obvious that this marketing tool will be a part of fourth element – promotion (marketing communication). Even though product placement is not a novelty, many authors generalized its understanding into the advertising of marketing communication. However, as well as this tool is growing on its importance and popularity, recent determination of marketing communication by Mr. Walter White (2015) placed a different picture. Within his study he assigned to product placement individual position within marketing communication mix. This fact also proves indisputable growth in interest for product placement.

Moreover, one of the first determination related to the issue of product placement was formed by Mr. Steertz (In: Chen and Deterding, 2013, p. 42) in 1987, where he understood this technique as deliberate inclusion of product or brand name, signs, packaging or merchandise of trademark into the television shows, moving pictures or music videos. In addition, few years later, distinctive characteristic of product placement was created by famous scientist Balasubramanian. According to him product placement represents form of a paid message about a product, which was created for the clear purpose, to manipulate and to affect spectators of particular TV show or a movie. All of this is done professionally, through inconspicuous and unobtrusive way by inclusion of brands and product into the different formats. In addition, he perceives product placement as “specific” tool with ability to affect spectators without identification of a sponsor (1994, In: Balasubramanian, et al., 2006).

For understanding of product placement, we bring also definition that describes it as “promotional tactic used by marketers in which characters in a fictional play, movie, television series, or book use a real commercial product” (www.wordiq.com, In: Dudovskiy, 2012). To sum it up, we can say that there are lots of different definitions of product placement from various authors that have changed during time and according market conditions.

Talking about the main purpose of product placement, we can ask ourselves this question. Why do the marketers use it? In general, it is very easy to answer, because product placement intention is almost same as traditional advertisement. Therefore, inclusion of brands into entertainment content is applied to reach “increased awareness, increased interest, increased intention to purchase and changed behaviour” (Guennemann and Cho, 2014). Moreover, according Brennan and Babin (2004, In: Guennemann and Cho, 2014) marketers use product placement also due to it enhances brand recall, recognition and creates more positive attitudes among viewers than traditional advertisement. Similarly, as previous authors we see a huge potential of product placement in brand recall improvement. Therefore, we found interesting to dedicate our attention in this field.

When we will go through a marketing literature, we will not find some comprehensive categorization of product placement that will clearly define some solid groups. According to the recommendations of author Papp-Váry (2015) we can group it into following categories:

- by the brands placed,
- by the type of product placed,
- by the position of the product lifecycle,
- by the position of product placement within the movie/program,
- by the position of brand/product in a plot of program,
- by the financial background of cooperation (In: Papp-Váry, 2015, p.480).

In a following part, we will take a detailed look at the last two categories of this classification. First of all, position of brand or product regarding to the plot of particular content is very important issue. In this case, we can talk about 2 crucial techniques of positioning brands into content - prominent and subtle. These techniques can be used separately or simultaneously.

Prominent placement is so called vivid or obvious, because of evident and effusive aim of marketers to include brands into content. It is characterized by displaying, using or talking about product and its specifications. Sometimes it happens that particular brand is a focal object of a story for a while. This activity is revealed quite quickly, enhanced by increased repetition of visual brand appearance and audio mentions. All of this influence viewer's attitudes and they are more aware that placed products are there for commercial purpose.

In contrast, subtle placement or so called "not in your face" is much more realistic, because of "hidden" attempt of marketers to influence viewers. For this technique is typical that brand is shown usually on background and therefore is usually harder to notice them. In addition, this method induces less suspicion and distraction among viewers and thus creates positive impact on consumer attitude of product placement (Ferraro, Avery, 2000, In: Liu, Chou, and Laio, 2015).

According to the study of Homer (2009), consumer brand impression would increase in case of prominent placement, but when marketers use subtle placement, attitude of customer toward it would be positive. From this statement, we can see that marketers should find the balance between combination of subtle and prominent placement and trade-off between advantages and disadvantages of both.

Some interesting findings from other research say that prominent placement is perceived as less realistic and more disruptive and especially interfere with the storyline. Moreover, repeated appearance of prominent placement encourages watchers to consider inappropriateness of this placement. It can have undesirable impact on attitude, but generates higher brand recall than subtle placement. On contrary, in case of moderate repetition of subtle placements, results and impact on attitude are opposite and therefore positive (Homer, 2009).

### **Aims, Materials and Methodology**

The main aim of this article is to identify the effect of product placement on consumer behaviour through different perspectives. In order to be able to fulfil this aim, it was necessary to investigate several partial aims such as to: (1) identify frequency of *TV watching*, (2) to explore *free brand recall* ability of consumers, (3) to reveal level of *program liking*, (4) to identify influence of *product placement prominence* on consumer brand recall or to (5) reveal perceived realism of *product placement usage*. Notably, we focused our attention on revealing effect of product placement prominence on consumer brand image perception or examination of consumer brand recall ability in connection with program liking and frequency of watching.

To be able to investigate this issue, we performed primary research. In order to fulfil the main aim of this paper, we set up following four hypotheses:

*H<sub>1</sub>: We assume that respondents with high level of program liking will be able to recall more brands and products than other groups.*

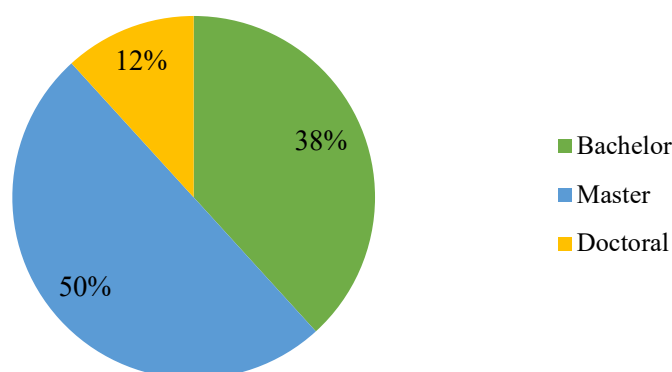
*H<sub>2</sub>: We assume that respondents with higher frequency of watching TV (daily and more times per week) will be able to recall more brands and products than other groups.*

*H<sub>3</sub>: We assume that among consumers who perceive placement as prominent will prevail negative brand image than among those who perceive it as subtle.*

In order to collect primary data necessary for our research, we decided to utilize method of questioning, provided by printed form of questionnaire survey as a tool of data gathering. Within our questionnaire we utilized questions with semantic differential statements, basic optional questions or level of agreement statements, enhanced by 7-point Likert scale to ensure sufficient range of options.

Our research was performed within 3 days, from 20. to 23. March of 2017 on Faculty of Economics in Banská Bystrica. For our research, we decided to approach university students, in order to obtain consistent sample. Research took place in a classroom at a faculty and respondents were exposed to the episode of Slovak serial. After deep process of searching and screening, we picked up episode of one of the most famous Slovak serial "Panelák" (episode number 991, length: 57 minutes). Except this serial belongs to the most popular ones for many years, it's broadcasting was connected with inclusion of many brands in a form of product placement. Moreover, we consider selected episode as appropriate, because it contains different brands and products with different form of their usage and placement. For example, we can mention brands such as Zlatý Bažant, Acaico, Clever, Billa, RAJO etc. Our intention was to reveal what effects has usage of product placement on behaviour of Slovak students.

Within our *research*, we approached 34 respondents (university students) and after processing data, obtained 34 complete answers. As a focus group for our research we deliberately decide to use university students, due to they represent focus group for product placement usage. Structure of these respondents can be divided into distinctive groups according identification criteria. We decided to distribute these respondents according to the three criteria, especially gender, actual grade of study and monthly net personal income. Our research sample consists of 35 % of men (i.e. 12) and 65 % of women (i.e. 22). By the criterion of actual grade of study, we targeted 38 % of students of Bachelor grade (i.e. 13), 50 % of students of Master grade (i.e. 17), and 12 % of students of PhD. grade (i.e. 4).



Graph 1 Distribution of respondents according to the grade of study

Source: Own elaboration.

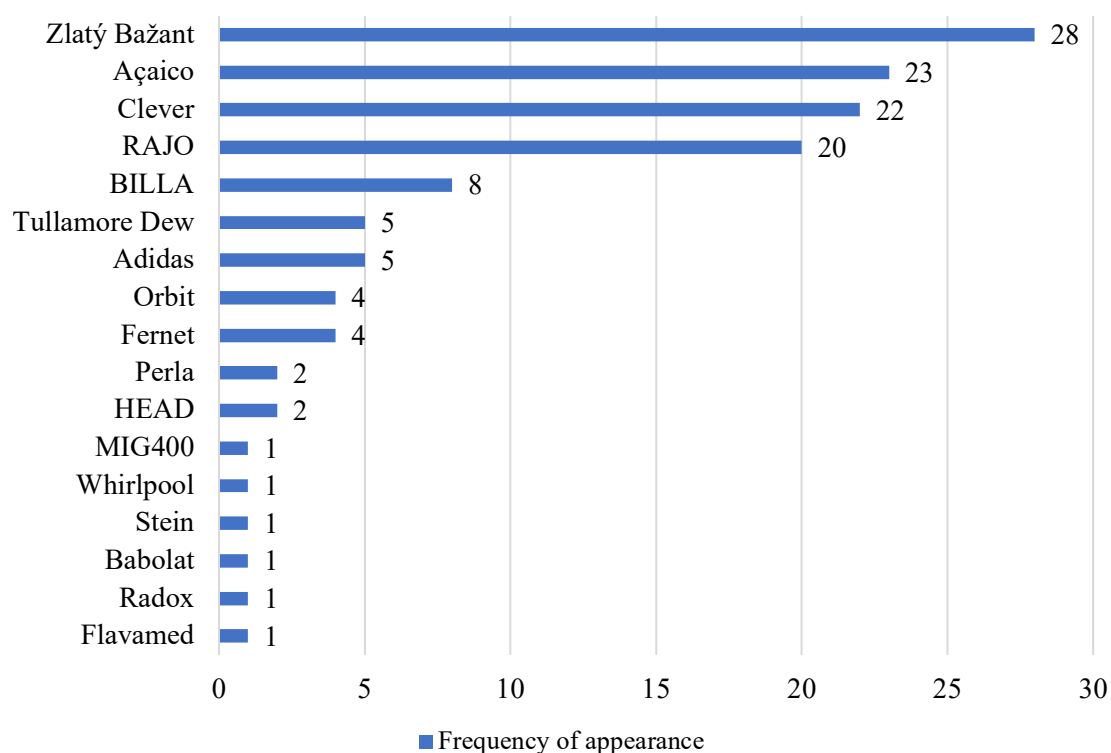
In the terms of monthly net personal income, there were 32 % of respondents (i.e. 11) with the net income from 201 to 350 euros per month, 23 % of respondents (i.e. 8) with the net income from 351 to 500 euros per month, 15 % of respondents (i.e. 5) with the net income from 101 to 200 euros, 9 % of respondents (i.e. 3) with the net income less than 100 euros per month and 12 % (i.e. 4) with the income from 501 to 700 euros per month, and lastly 9 % of respondents (i.e. 3) with the net income more than 701 euros per month.

For verification of hypotheses and statistical testing of various relationships within the study we utilized different statistical tests. At first, we used binomial test for hypotheses verification. Later, we performed correlation analysis, especially Spearman correlation coefficient.

## Results

After processing data from our research, we can identify following outputs. Related to our first area of investigation – frequency of TV watching, 44 % (i.e. 15) of respondents are watching TV frequently (daily or more times per week). Second group of TV viewers is represented by 38 % (i.e. 13) of respondents, who use to watch TV occasionally (once a week or 2-3 times per month). Next group, 9 % (i.e. 3) of respondents is characterized by those who barely watch TV (once a month or less). Last group of respondents (i.e. 3) states for 9 % of total amount and is related to those who do not watch TV at all. We can summarize that frequency of TV watching among our respondents is quite high.

Further part of our research was oriented on revealing respondent's ability to free brand recall. Their task was to write down name of all brands that they have seen or heard about during episode of serial. Following Graph 2 is showing answers of our respondents.



Graph 2 Distribution of respondent's free brand recall ability

Source: Own elaboration.

We may see that presence of brands such as Zlatý Bažant, Açaico, Clever and Rajo is significant. From total amount, 82% (i.e. 28) of respondents were able to recall brand Zlatý Bažant and brand Açaico was recalled by 68 % (i.e. 23) of them. Third most appeared brand Clever was recalled by 65 % (i.e. 22), while right behind was brand Rajo with 59 % (i.e. 20) of total respondents. This fact is connected to the character of their placement. First three brands were used many times during episode, moreover they have been prominently placed according our own analysis of episode. Fourth one, Rajo was not prominently placed, but appeared in episode many times too. These facts caused that respondents were able to freely recall them in high quantity. On the other hand, brands such as Adidas, HEAD, Babolat and Stein have been mentioned too. These brands took part in episode, but in this case, we can doubt if this was aimed and paid product placement, due to there is a little chance that these brands have some deal with producers. However, they have been recognized and recalled by our respondents and they may have some effect on them.

For verification of our hypothesis  $H_1$ , we applied SPSS program to analyse relationship between frequency of TV watching and number of brands that respondents were able to recall. Thus, we applied statistic test of correlation (Spearman correlation coefficient). We set the significance level at  $\alpha=0.05$ . Results of this test support our assumption, because the p-value is 0.009 what is less than significance level. According to the values of Spearman correlation coefficient -0.441, there is directly moderately strong dependence between variables (in this case, we can talk about direct dependence. because of opposite formulation of questions). It

means that when frequency of TV watching among consumers increases they are able to recall more brands. According to the results of this statistical test, we can state that the *hypothesis H<sub>1</sub>* was confirmed.

Table 1 Correlation analysis I.

## Correlations

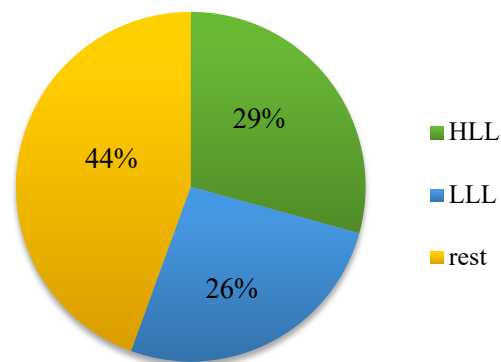
			frequency	number of brands
Spearman's rho	frequency of watching TV	Correlation Coefficient	1,000	-,441**
		Sig. (2-tailed)	.	,009
		N	34	34
	number of brands recalled	Correlation Coefficient	-,441**	1,000
		Sig. (2-tailed)	,009	.
		N	34	34

\*\* . Correlation is significant at the 0.01 level (2-tailed).

Source: Output of data processing in SPSS program.

Next, we explored respondent's level of liking to particular episode of serial they have seen. For this purpose, we created 4 questions, each one is focused on something little bit different, while answers were put together. As a procedure of level of liking processing, we were inspired by (Murry, Lastovicka and Singh, 1992; In: Cowley and Barron, 2008). Therefore, we assigned particular number of points to each option on answer scale (from +3 up to -3). In reality it meant that, if respondent marked 1. option, it represented +3 points and vice versa. Later, respondents were sorted into groups according sum of points they "achieved" from these 4 questions. Total possible amount of points to "achieve" was in a range of <-12;+12>. Based on this procedure, we decided to consider respondents within range <+5;+12> as a HLL (high level of liking) group and respondents in a range <-12;-5> as a LLL (low level of liking) group. It means that, respondent was considered as HLL only if he reached at least 5 points together. Border of 5 or -5 points was determined due to, we deem that this number of points is sufficient to express respondent opinion. First group of respondents with HLL is represented by 29 % (i.e. 10) and second group with LLL states for 26 % (i.e. 9).





Graph 3 Distribution of respondents according to the level of serial liking

Source: Own elaboration.

In case of hypothesis  $H_2$  verification, we decided to use statistical test of correlation analysis (Spearman correlation coefficient). Significance level was set at  $\alpha=0.05$ . Results of the test did not support our assumption about relationship between level of program liking and number of brands recalled, because p-value was 0.545 what is higher than significance level. From this reason, we have to state that there is no statistically significant dependence between level of program liking and amount of brand recalled. According to results of this statistical test, we have to state that the *hypothesis  $H_2$  was not confirmed*.

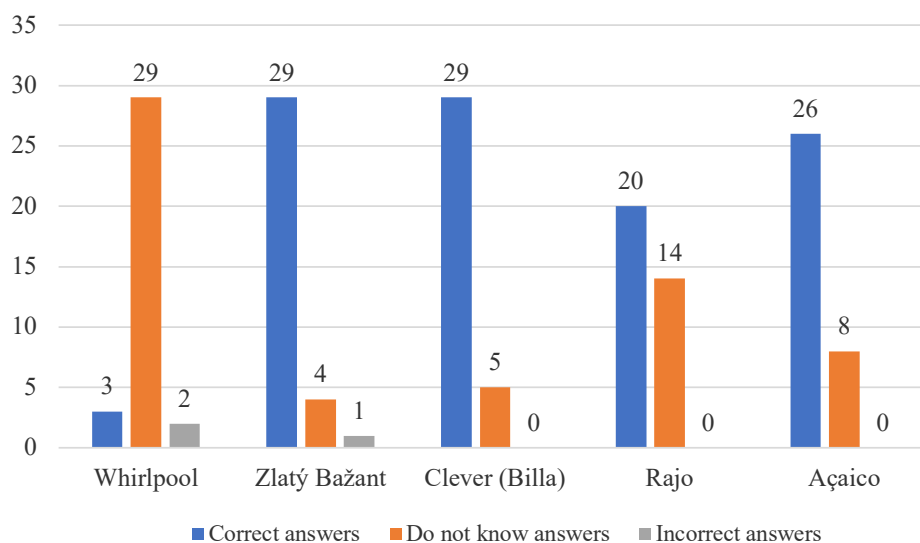
Table 2 Correlation analysis II.

**Correlations**

			level of program liking	number of brands
Spearman's rho	level of program liking	Correlation	1,000	,108
		Coefficient		
		Sig. (2-tailed)	.	,545
		N	34	34
	number of brands	Correlation	,108	1,000
		Coefficient		
		Sig. (2-tailed)	,545	.
		N	34	34

Source: Output of data processing in SPSS program.

Within following part of research, we focused on respondents aided brand recall ability. For each of 5 questions, they have to mark which brand was used in serial (from list of 4 brands from same industry + one "I do not know" answer). They were not allowed to guess, what was even more secured by 3 additional open questions ("What was done with particular brand/product?", "How was particular brand/product mentioned?" and "Where on a screen was particular brand/product situated?"). During data processing, we checked correct answers, but we approved only those, which have at least 2 correct answers of open questions. With this procedure, we ensured that respondents answered only if they were sure about brand and its usage. Following graph 4 is showing us results of aided recall for each brand.



Graph 4 Distribution of respondents according answers to aided recall

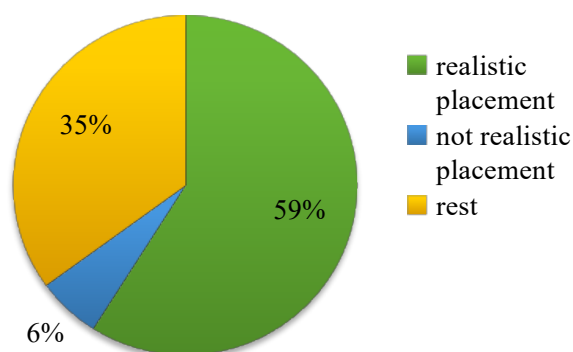
Source: Own elaboration.

Here is proven that different type of product placement usage influence consumer brand recall ability. As we can see, respondents did not have any problem to recall brands such as Zlatý Bažant 85 %, Clever (Billa) 85 % or Açaico 76 %, because they were evidently or better said prominently placed into serial. We assume, that due to they have been mentioned many times, or they inclusion was obvious, respondents identified them with ease. On the other hand, respondents may hesitate in case of brand Rajo, due to its usage was not so evident, therefore we can talk about subtle placement of this brand. Last brand, Whirlpool which was used only in a form of very subtle placement, was problematic for respondents, because only 9 % (i.e. 3) of them were able to identify and recall this brand.

To sum it up, we can say that prominence of placement is taking a significant role in consumers brand recall, as it was proven in many other researches (Homer, 2009; In: Liu, Chou, and Liao, 2015). It means that with increased frequency and increased prominence of placement, brand recall among consumers is obviously higher. During answers analysis, we were slightly negatively surprised about aided recall of brand Açaico, because we expected higher rate of recall among respondents. This brand, as only one had visual and audio mention in prominent and subtle forms and proportion of respondents that recalled it was lower, compared to other 2 brands. This fact could be caused by frequency of Zlatý Bažant placement, which was enormous or as respondent's stated – disruptive or blatant placement of brand Clever (Billa).

Within next group of questions, oriented on realism of used product placement, we decided to use same procedure as in evaluation of serial episode level of liking. Similarly, we have 4 slightly different questions, while their answers were put together. Equally, we assigned particular number of points to each option on answer scale (from +3 up to -3). Subsequently, respondents were divided into groups according sum of points they “achieved” from these 4

questions, while same ranges were used. Respondents with total amount of points between  $<+5;+12>$  represented 59 % (i.e. 20) and those with sum of points between  $<-12;-5>$  represented 6 % (i.e. 2). Rest of respondents 12 (35 %), whose answers oscillated around middle values were grouped together. From the results, we can see that more than half (59 %) of respondents perceived placement as realistic and conform to the plot and scenes. This information is quite interesting, because in spite of majority of respondents perceived placement as prominent, they considered it as realistic.



Graph 5 Distribution of respondents according product placement realism

Source: Own elaboration.

This question was extended by open question, to determine specific product that would particular respondent buy. Equally, 4 times was mention Açaico, Clever juice and beer Zlatý Bažant and two times Rajo milk. This preference list also corresponds with frequency and appearance of brands in episode. Interesting was that some respondents stated, they would like to buy it because usage of this brand in serial motivated them to try it (Açaico) or to buy it, because they did not have it for long time (Clever juice). This question should receive higher attention, but due to limited sample, resources and scope of our research, we were not able to analyse it deeply.

One of the last questions, focused on identifying possible change in consumer brand preference after product placement exposure, brought us similar results as previous question. Among all, only 9 % (i.e. 3) of respondents shown small intention to change their brand preference upon product placement in serial. On the other hand, among solid 88 % (i.e. 30) of them was not shown any change of brand preference. To sum it up, we have to say that within our research environment and settled sample, effects of product placement on consumer purchase intention and brand preference were very low.

Very last question of this research was aimed to uncover possible change of consumer brand image perception after product placement exposure. Results clearly showed that respondents are not very clear about influence of product placement on brand image, because

73 % (i.e. 25) of them marked middle value. Even though, when taking look on those who expressed some brand perception change, 24 % (i.e. 8) of respondents inclined to positive change of brand image. On the other hand, just 3 % (i.e. 1) of them inclined to negative change of brand image. Due to our limited sample, it is difficult to interpret some results, based on just a few answers.

Related to the brand image and prominence of product placement, it is necessary to take a look on our last hypothesis H3. For verification of this hypothesis was used statistical test of correlation analysis (Spearman correlation coefficient). Significance level was set at  $\alpha=0.05$ . Unfortunately, results of the test did not support our assumption about relationship between product placement prominence and brand image perception, because p-value was 0.803 what is higher than significance level. From this reason, we have to state that there is no statistically significant dependence between product placement prominence and brand image perception. According to results of this statistical test, we have to state that the *hypothesis H3 was not confirmed*.

Table 3 Correlation analysis III.

## Correlations

			prominence of placement	brand image
Spearman's rho	prominence of placement	Correlation Coefficient	1,000	,044
		Sig. (2-tailed)	.	,803
		N	34	34
	brand image	Correlation Coefficient	,044	1,000
		Sig. (2-tailed)	,803	.
		N	34	34

Source: Output of data processing in SPSS program.

In order to extend examination of product placement and its usage we have applied statistical tests of correlation (Spearman correlation coefficient) for all identification criteria and free brand recall ability. We set the significance level at  $\alpha=0.05$ . In case of income level, results of this test support our assumption, because the p-value=0.011 what is less than significance level. According to the values of Spearman correlation coefficient 0.433, there is directly moderately strong dependence between variables.

Table 4 Correlation analysis IV.

**Correlations**

			number of brands	level of net income
Spearman's rho	number of brands	Correlation Coefficient	1,000	,433*
		Sig. (2-tailed)	.	,011
		N	34	34
		level of net income	Correlation Coefficient	,433*
		Sig. (2-tailed)	,011	.
		N	34	34

\*. Correlation is significant at the 0.05 level (2-tailed).

Source: Output of data processing in SPSS program.

Based on results of these statistical tests, we can say that surprisingly there is a correlation between level of net income and ability of consumer to recall brands. We can see that those consumers with higher level of their net income are able to recall more brands, what could be connected to their purchase power, lifestyle or need of seeking new trends.

### **Discussion and managerial implications**

The purpose of paper is to reveal effects of product placement on consumer behaviour from different perspectives. Mainly, we focused our attention on revealing effect of product placement prominence on consumer brand image perception or examination of consumer brand recall ability in connection with program liking and frequency of watching. Within our research, we verified and confirmed our assumption that prominent product placement is more remembered and recalled by consumers than subtle. Based on the results of research, we can say that there can be seen unequivocal difference between recall ability of brands that had subtle or prominent form of placement. In case of subtle placement, the level of their recall ranged between 3 – 24 % of all respondents. On the other hand, rate of prominently placed products recall was from interval 59 – 82 %, what is significant difference. This fact was proven also by answers of our respondents, where from the top 4 brands, exactly 3 had form of prominent placement. Thus, they have been frequently used or were important for the content or scene. Last, fourth, brand placement did not have clear character of prominent placement, but its appearance frequency was very high too.

This fact was verified also with the testing the aided recall ability of our respondents (as we explained in details in analytical part), what even more confirmed huge difference

between subtle and prominent placement. This can be seen on an example of brands Zlatý Bažant and Whirlpool. Zlatý Bažant with its significantly prominent placement character achieved answers of 29/4/1 (correct, do not know answers, incorrect) from respondents, while within Whirlpool, as very subtle placed brand, answers of respondents were 3/29/2 (correct, do not know answers, incorrect). Here is proven evident difference between consumer ability to recall brands and products based on the type of their placement.

Coming from these facts, we strongly recommend companies to use prominent placement in TV shows, if it is in their abilities and in accordance to their financial resources. We have just proven, that prominent placement has much more higher effect on consumer brand recall and recognition ability than subtle placement. It is obvious, that price and costs of product placement depend on its type, length, prominence and popularity of TV show. From this reason, it is important for companies to revise their aim in advance and then make a decision. It is necessary not to just carefully rethink everything, but also to properly implement it, in order to avoid some wastes. Implementation process is very important, because we do not want to reach very blatant placement, which could probably have negative effect and harm a company. Here takes very important role creativity, ability and good communication of company (marketers) with the producers of TV shows and advertising agencies as well, if they take part in this process.

Another interesting finding from the field of brand recall showed us quite good recall ability of Slovak consumers. From their answers in our research, we identified that on average each respondent was able to recall 3.8 brand, therefore circa 4 brands. In our opinion, this number could be considered as solid, due to many brands have been mentioned just for a very short time and in a very subtle form. Moreover, the highest number of brands that was individual respondent able to recall was 7, what is quite high amount, due to in all episode appeared together 13 brands.

In addition, these numbers represent good potential of Slovak respondents for product placement usage. If we imagine that only from one view of this episode of serial, consumers are able to recall such number of brands, what it could reach when they would watch it regularly? We can assume that this amount would be probably higher, what sends very positive signals to the companies in favour of product placement usage.

Next, within our research we explored the field of level of consumer's net income and their brand recall ability. Results of our research showed, that there is a middle strong dependence between level of net income and number of brands recalled by consumers. This fact could reflect consumer's purchase power, lifestyle, needs and seeking of new trends. Its main importance goes for companies, because consumers with higher level of net income, thus with higher purchase power, are able to recall more brands. This finding is quite interesting and may be very important for marketers in their decision-making process about focus group. From this reason, we recommend companies to focus their attention on consumers with higher level of income (higher purchase power) also within the process of right product selection. This should consequently bring them higher returns, because of higher brand recall and higher purchase power.

Finally, we have investigated importance of different type of product placement usage. Even though during our research, this fact was not strongly confirmed (brand Açaico, was 3. most recalled), many other researches such as (Sabherwal, Pokrywczynski, Griffin, 1994; In: Lee and Faber, 2007, p. 75) proved that usage of audio mention of brands and products has

higher effect on brand recall. In case that company wants to get the most of the product placement, we recommend them to use it in combination form, therefore to use audio and visual mention. This should ensure the strongest effect from product placement usage.

### Conclusion

In this paper, we have investigated the effects of product placement on consumer behaviour through different perspectives. Notably, we focused our attention on revealing effect of product placement prominence on consumer brand image perception or examination of consumer brand recall ability in connection with program liking and frequency of watching. We have realized quantitative research on the sample of Slovak students and proved correlation between level of net income and consumer brand recall ability and verified assumption that prominent product placement is more remembered and recalled by consumers than subtle. Research results should help businesses to identify the effects of product placement on consumer brand image and brand recall ability.

In case of our research, we have to admit that sample of university students could be considered relatively small and it would be necessary to enlarge this amount, in order to get more objective point of view. In addition, to be able to generalize results of this research, it would be appropriate to include students from different towns, universities and from different fields of study, to get much more general perspective. It would be suitable to make this research in home environment of each respondent, to create them comfortable and natural environment.

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## ON THE MISINTERPRETATION OF THE CONCEPT OF POPULISM IN THE WORK OF MARGARET CANOVAN

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### Abstract

The British social researcher Margaret Canovan is nowadays considered to be one of the most important classics of the sociological concept of populism, especially thanks to two works on this subject regarding *Populism* and *The Peoples*. Undoubtedly, the division of populism, proposed by the author, into agrarian and political populism has become the canon of the interpretative allocation of the meanings of the concept of populism. Canovan with great reliability presents the links between populist mobilization of the masses and their disappointment with social functions of political elites, presenting in her writing this dichotomy as a constant component of populism<sup>1</sup>.

Reading more carefully Canovan, however, I could not help the impression that the author in her analyzes is not entirely objective and even misinterprets the concept of populism. This text is therefore an attempt at some critical interpretation of the ideas proposed by the author. Appreciating the author's huge and unquestioned contribution to the discourse on populism, I also wanted to capture the imperfections of this way of thinking about populism as a social phenomenon. This is important because Canovan imposed a certain interpretative framework, stimulating the discourse on the subject of populism on the one hand, and giving it negative connotations above all and showing it as a destructive force. Avoiding in her analyzes the presentation of positive functions of populism, she led to the consolidation of one-sided interpretations of the phenomenon, hence my voice is also an attempt to show the positive social functions of populism.

### *On the misinterpretation of the concept of populism in the work of Margaret Canovan*

Populism has again become a subject of keen interest among social scientists, as it is increasingly used as a tool for communication between the masses and the elites<sup>2</sup>. However, I do not intend to focus strictly on the reasons for the renewed popularity of populism in this text, but to show that we should again consider the very definition of the phenomenon. It can only be useful to undertake further deeper analyzes regarding the reasons for the renewed importance of populism as a tool of social communication. At the same time, I believe that in this regard, a second look at the classic interpretation proposed by Margaret Canovan is a necessary step taken in order to make future attempts to diagnose the current situation. To present my argument in the most coherent way, I would like to return at the beginning to the definition challenges related to the interpretation of populism.

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<sup>1</sup> M. Canovan, *Populism*, Junction Books, London 1981., p.p. 9, 139, 297.

<sup>2</sup> R. Eatwell, M. Goodwin, *National Populism. The Revolt Against Liberal Democracy*, Penguin Random House UK, 2018, p. ix.

By definition, Latin noun *Populus*-people used in the context of modern times already have pejorative connotations, because the key category of populism, the aforementioned people, is now, at least partly, a disparaging category. It should also be noted that there is a clear difference in the understanding of the terms people and citizens, and in the colloquial understanding the people are a rather simplifying and at the same time ambiguous category of description. This is connected with the historical meaning of the terms people and citizen.

In pre-modern times, when the public sphere did not yet exist or it took a representative form<sup>3</sup>, the discourse was conducted within the power elite that exercised absolute control over public affairs, the people were a category used to define broad social strata that had no impact on the fate of the state. What's more, according to Michael Billig, the masses did not identify with the state, and their awareness of their place and social role was extremely limited<sup>4</sup>.

Along with general social progress and the development of the public sphere, initially bourgeois and then civil, the category of citizen (consciously participating in the life of the community, having knowledge of their rights and obligations resting on it) began to displace the category of people, to whom pejorative connotations were increasingly being assigned. As a consequence, the latter more and more acquired the semantic features of the former antonym. It is true that even the romantic notion of the people or peoples had positive emancipatory connotations, but over time the pejorative expressions superseded those positive ones. Looking at both categories today, it is easy to grasp this difference at the level of defining and imposing forms of understanding of the concepts themselves.

The etymological dictionary defines a citizen as a member of the society of a given country, a permanent resident of some area. Citizenship by definition suggests universality associated with belonging to a certain community<sup>5</sup>. More specifically, following the dictionary, we can define citizenship as "nationality combined with certain rights and obligations set out by the law of a given country"<sup>6</sup> and the very concept of citizenship as "taking into account the good of the country and the obligations incumbent on its citizens."<sup>7</sup> On the other hand, the term *people* impose many contradictory interpretational possibilities. The definitive people, according to the dictionary, include: "working layers of society, rural population, ethnic group, [...] masses, crowds, lieges, peasants, servants, tribe, nation, society, citizens, subjects, residents (cities, countries, etc.), faithful followers of religion, in the old days males, diminutively folk peoples"<sup>8</sup>. Such a broad terminological definition allows for a comprehensive, and as previously noted, often contradictory use of the term. Narrowing the definition of the people, the dictionary describes it as follows: "layers of society made up of wage labor, primarily workers and peasants, formerly mainly of rural population" or as "human community, crowd, people"<sup>9</sup>

The above definition shows one significant definition feature of the *people* as a descriptive category. Low social and cultural competences are allocated to it mainly due to

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<sup>3</sup> J. Habermas, *The Structural Transformation of the Public Sphere, An Inquiry into a Category of Bourgeois Society*, Translated by Thomas Burger with the assistance of Frederic Lawrence, Polity Press Cambridge 1992., pp. 10 -11.

<sup>4</sup> M. Billig, *Banal Nationalism*, Sage Publications, London 1995., pp. 53-54.

<sup>5</sup> Wiesław Boryś, *Słownik Etymologiczny Języka Polskiego*, [Etymological Dictionary of the Polish Language], Wydawnictwo Literackie, Kraków 2005., p. 378.

<sup>6</sup> *Uniwersalny Słownik Języka Polskiego, Tom 3 [Universal Dictionary of the Polish Language, Volume 3]*, Wydawnictwo Naukowe PWN, Warszawa 2003., p. 65.

<sup>7</sup> *Ibidem*

<sup>8</sup> W. Boryś, *Op. Cit.*, p. 291.

<sup>9</sup> *Uniwersalny Słownik Języka Polskiego, Tom 3, Op. Cit.*, p. 679.

statistically low education and, which is associated with the above, low social status resulting from this fact. Workers, peasants or rural population in general perception as group allocation categories are not associated with the elitist status, on the contrary, these categories are located at the bottom of the so-called ladders of social prestige.

It's similar in principle with the definition of democracy- *demos cratos* - the rule of the *people*, although in the latter case the *people* have now been replaced by the category of *citizens* and more generally with concept of *citizenship*, and this is precisely so as not to give the defined concept negative connotations. One usually returns to the category of *people's rule* at a time when, in political arguments, one wants to discredit the importance of democracy as a political system, in this particular case showing its immaturity.

The category of the people itself has never been completely defined, although, as Margaret Canovan notes, two contradictory interpretations have been allocated to it since Roman times<sup>10</sup>. On the one hand, the people are identified with the descriptive category of the so-called commune, plebs, clearly pejorative and referring to it as a discrediting category. In this interpretation, the people are synonymous with thoughtlessness, mass, a crowd deprived of independent initiative, and used by politicians to legalize their power<sup>11</sup>. On the other hand, the people are identified with the sovereign and the concept of citizenship. In this case, consideration of people is an integral element of reflection on democracy as a political system and the will of the people as a guarantor of the legalization of power (the people as a sovereign) in democratic systems<sup>12</sup>.

As the author herself writes:

The ambiguity of the concept of *populus* is clearly visible in a short fragment of speech [...] in which Cicero easily passes between the inclusive, intergenerational meaning of the word and the meaning relating to the crowd of plebeians standing in front of him in the forum<sup>13</sup>.

The author's short remark in the footnote to her mainstream considerations reveals definition challenges related to the lack of specificity of the concept of the people / *populus* itself and the possibility of its different, sometimes even opposing interpretations, which largely influenced also future conflicting allocations of this concepts.

Elsewhere, the author clarifies this dialectical distinction of Roman *populus* meanings. Quoting the historian Moses I. Finley, she notes that the Latin word *populus*, like the Greek *demos*, coincides in meaning<sup>14</sup>. Both also have a double interpretative connotation. On the one hand, Greek *demos* meant a general public, but on the other it was a simple people, commonplace, and poor. Similarly for Latin *populus*. *Populus* was defined on the one hand as the general public, that is, as Finley explains: a group of citizens "raised above slaves, women and inhabitants of foreign origin"<sup>15</sup> on the other, "in republican Rome, *populus* [...] meant plebs, which his aristocratic superiors despised and feared"<sup>16</sup>.

The author notes three main reasons for fearing the commune:

First: since the people are poor, they can easily be stirred up by demagogues.

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<sup>10</sup>M. Canovan, *Lud [The People]*, przeł. Sebastian Szymański, Wydawnictwo Sic!, Warszawa 2008, Pp., 20-22.

<sup>11</sup> *Ibidem.*, p. 21.

<sup>12</sup> *Ibidem*

<sup>13</sup> *Ibidem*

<sup>14</sup> *Ibidem.*, p.88.

<sup>15</sup> M. I. Finley, *Politics in the Ancient World*, trans. D. Kozińska, Social Publishing Institute Znak Kraków 2000., p. 10.

<sup>16</sup> *Ibidem*

Second: because the people are "foolish and stubborn," they are irrational and tend to turn into a mob.

Third: the populist leader could have encouraged the establishment of tyranny<sup>17</sup>.

It should be noted that the convergence or even semantic identity of both concepts, that is of Greek *demos* and Latin *populus*, is, however, marginalized by the author. At most, she focuses on the definition of *demos*, already described by Aristotle, which, in his view, means on the one hand the general public but on the other those "poor opponents of the rich", i.e. the majority opposed to the social elite<sup>18</sup>.

In her narrative, however She sharpens above all and transfers to contemporary descriptions the dichotomy presented by the author of *Politics*, in this case using the Latin *populus* to support her theses. Here, however, the dichotomy of meanings is already omitted. As a consequence, *populus* ceases to be identified with the general population and the Aristotelian description of the excluded (poor) against the privileged (elite) will be the dominant subject of Her analysis.

In *populus*, the author sees above all a threat to social order, while also more or less consciously discrediting its positive functions, which, in my opinion, are extremely important for discussions about populism today. These are among others: the possibility of an affirmatively used aggregation of social discontent of the discredited majority and the possibility, thanks to grassroots social activities, to repair some malfunctioning mechanisms of social equilibrium. Ultimately, Canovan avoids treating populism as a marker of social sentiment and the marker of stability of political systems, which is neutral by nature, and sends certain signals that politicians should interpret as some kind of cautionary signals suggesting the need to revise the political course or even to review certain paradigms.

For this, however, a positively marked relation to the category of people would be needed, i.e. showing people as a general public capable of making conscious political choices and not just treating them in terms of discredited masses usually used by demagogues of various authority to achieve political benefits, more or less destructive for social life.

*Populus* (people) or, to clarify the Roman *populus*, *Romanus* (Roman people) has, whether we like it or not, two dialectically different descriptive features that will influence later attempts to define the term in a definitive way. Unilateral showing of the destructive potential of populism, and at the same time disregarding its positive functions of corrective influence on the social system, puts populism among the social diseases, discursively discriminating against its emancipatory potential.

The author, citing British historians Andrew Lintott<sup>19</sup> and Fergus Millar<sup>20</sup>, writes that in Rome (times of the Republic - P.D.) in which power was divided among elected consuls, the Senate and the people's assembly, aristocratic power contenders had to seek the support of the people represented by the people's assembly and acting as representativeness of Roman citizens<sup>21</sup>.

*Populus* represented broad social masses from peasant classes to the middle class and included free citizens of Rome [including urban poverty (*plebs urbana*)] who were deprived of

<sup>17</sup> M. Canovan, *Lud [The People]*, pp. 85-86.

<sup>18</sup> Arystoteles, *Polityka [Politics]*, przeł. Ludwik Piotrowicz, Wydawnictwo Naukowe PWN, Warszawa 2004., pp. 113.119, 123.

<sup>19</sup> A. Lintott, *The Constitution of the Roman Republic*, Oxford University Press, Oxford 1999.

<sup>20</sup> F. Millar, *The Crowd in the Rome in the Late Republic*, The University of Michigan Press, 2002.

<sup>21</sup> M. Canovan, *Lud.*, p. 21.

the possibility of rapid social advancement, although they had a significant impact on the state's policy. As Millar points out, the people's assembly was an important element of exercising power because of the role of Tribuni Plebis (people's assembly) in the political life of the community<sup>22</sup>. Millar even believes that an open public debate based on the conciliatory principle of deliberation and reconciliation of community matters can be seen as one of the few examples of democracy in action, moreover a more important but less remembered pattern<sup>23</sup>.

Populus / people, especially those of the late Roman republic described by Millar, was largely dependent on populares, i.e. politicians who, as the author notes, "ostentatiously earned their friendship and played on the emotions of the crowd"<sup>24</sup>

Canovan adds that a little later began to identify populus with the commune (plebs), which already included all the lower social strata. Therefore, the people began to be associated with the excluded layers<sup>25</sup>.

It is largely thanks to the manipulative activities of populares that the descriptive definition of the people / populus remained synonymous with mindless masses, easily manipulated by simple tricks of sophisticated social actors deriving from this naivety the legitimacy of their political actions. Often, these masses were also connotated with the commune and the commune with the people (e.g. in the works of Gustaw Le Bon<sup>26</sup>).

Until modern times, in attempts to define the phenomenon, one can find, as one of the distinguishing features of populism, the element of demagogic crowd manipulation. Canovan notes, however, in another publication that populism can be considered as a transitional stage between the pre-democratic societies characterized by subjective perception of social reality, and sometimes the emergence of modern systems of representative democracy. Still, due to its specificity, populism is for the author a meeting of politically discredited elites with the masses at their disposal<sup>27</sup>. In this case, the elites, just like in Roman times populares act as initiators of social activities, and the masses are a tool for them to exert political pressure.

The later historically defining of populism as a social phenomenon owed a lot to Roman traditions. Especially thanks to the ambiguous (as to the intention and role) of social function of the so-called populares, that is- a Roman politicians gaining the favor of the crowds with catchy and usually not fulfilled political promises in later praxis. By using the crowds to achieve certain particular benefits, they did not take into account the interest of the general public but only personal egotism. This custom of Rome's widespread search for support among the lower strata, often naive and lacking in knowledge and ability to rationally assess the situation, had an impact on the pejorative, in fact, assessment of the populus and its subsequent identification with the commune.

As I mentioned before, the concept of the people was also identified with the concept of the people as a sovereign and the concept of citizenship. In the latter case, however, the very concept of the people and their interpretation is crucial for understanding Canovan's narrative. The title of her book: - *The People* may refer to the concept of conscious citizenship, community identification from ethnic to national to supranational as well as, as Canovan notes,

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<sup>22</sup> F. Millar, *The Crowd in the Rome...*, p. 10.

<sup>23</sup> *Ibidem.*, p.11.

<sup>24</sup> M. Canovan, *Lud.*, p. 21.

<sup>25</sup> *Ibidem.*, p. 21.

<sup>26</sup> G. Le Bon, *The Crowd. A Study of the Popular Mind*, Cosimo Classics, New York 2006., pp, x-xii.

<sup>27</sup> M. Canovan, *Populism.*, p. 139.

those universalizing humanity.<sup>28</sup> However, Canovan makes many simplifications or even misinterpretation of the facts to then use those to support her narrative.

A good example of the interpretation difficulties facing the author is described briefly, in the author's book, the democratic breakthrough in Central and Eastern Europe in 1989. In her considerations, Canovan refers to a bloodless revolution in East Germany in 1989 and the successive unification of East and West Germany into one state organism. Then the protesters against the Erich Honecker regime chanted the slogan which Canovan presented as, "we are the people,"<sup>29</sup> although the slogan of the manifestation: "wir sind das Volk" - should be translated rather as "We are the nation".

It is true that the noun *volk* may have different interpretations, but in this particular case it was clearly synonymous with the nation. However, her reflections on the essence of "folk" slogans of 1989 rather obscure the image of the interpretation of the turn of 1989 than contribute to it clarification. Let us remind that the noun *volk* can mean as follows: a): people (*Volk*, *Leute*), b): nation (*Nation*, *Volk*) and c): common people (*Mob*, *Pöbel*, *Volk*). Unfortunately, Canovan insisted on the first interpretation, that is on a vague definition of the people.

Nevertheless, it should be noted that the protesters against the Honecker dictatorship were meant to show that regardless of the artificial divisions imposed along with the outcomes of World War II, Germany is still one nation and wants to unite Germany into one state<sup>30</sup>. It should be mentioned here that, as is the case with this type of simplification, she forgot to add that in addition to "wir sind das Volk", protesters against the communist dictatorship in eastern Germany also chanted the slogan "Wir sind ein Volk", "We are one people", i.e. "We are one nation." However, they did not want to show that they were a common people or a plebs, but a national community, artificially divided politically, who demanding through collective mobilization of reunification into one state organism<sup>31</sup>. Therefore, despite the fact that the category of *volk* - people can be interpreted in many ways, in this particular case the context of protests and political demands were important, and these clearly defined the goal of creating a single political organism on the basis of common national identifications<sup>32</sup>.

However, there is another problem in this case related to the interpretation of this type of activity. Protests in East Germany were massive and extended to many German cities whose inhabitants crowded out onto the streets to participate in them, at the same time giving rise to not only unification processes, but also the processes of rebuilding civil society in Germany. Common people came out on the streets, dissatisfied with the fact that their collective interest as the interest of the national community was discredited for decades and the nation deprived of subjectivity. However, Canovan interprets the described process as a populist revolution in which "the people took matters into their own hands" and voila succeeded.

The question should be asked whether this interpretation would fit into the interpretation of the phenomenon postulated as binding since Roman times, saying that, firstly, the discredited elites use the people to achieve their political goals, and secondly that populism is a transitional stage from subjective to objective. In this particular case, it was the people (the

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<sup>28</sup> M. Canovan, *Lud.*, p.10-11.

<sup>29</sup> *Ibidem.*, p. 9.

<sup>30</sup> P. Dejneka, *Pegida and what next in Europe*, [in:]: *SGEM Vienna (book 2: Political Sciences)*, Vienna 2016., pp. 362-363.

<sup>31</sup> *Ibidem.*, p. 363.

<sup>32</sup> *Ibidem*

P.D people) who opposed their elites, though in the final analysis it was the nation that went the victorious path from subjective to objective treatment as the interest of the nation. The people eventually became an independent sovereign of their freedom.

If one follows Canovan's interpretation, it should be noted that the "folk" of ordinary people had enormous potential aggregating the emancipatory demands of the "people" who carried out a democratic revolt against the elites, who in no way were willing to listen to the voice of "their people." Ultimately, due to the pressure of the "people", elites transferred power to them. In this case, the people proved to be a nation effectively demanded the right of self-determination about their own fate. The people identified with the nation eventually became a sovereign. This, in turn, led to unification and creation of the new political system of the already unified state.

I described a case to show an interpretation problem hidden in Canovan's analyzes. It is of such nature that certain social events described by inaccurate definitions show the disproportionate words and their meanings to describe the studied reality. And this can consequently lead to biased descriptions, as a result, even to discursive discreditation of the meanings assigned to certain concepts. The solution seems to be using precise descriptions that use terms that are clear as to their meaning.

It should be noted, however, that Canovan shows that already in the very naming in English we are dealing with the need to constantly refine the definition of the people, because, as the researcher writes, "the people embrace a whole range of meanings, many of which are incompatible with others"<sup>33</sup>, adding, that "some senses are easy to translate into other languages, others harder"<sup>34</sup>. Refining her comments and referring to the categorization of Menye and Surel in this regard<sup>35</sup>, she states, however, that the three basic meanings of the English term have their equivalents in other European languages. These meanings are of the following kind:

1. People are the same as a sovereign
2. the people are identical with the nation
3. People are the opposite of the ruling elite - this category can be identified with the terms ordinary people or municipalities. In the latter case, allocating both of these meanings to the Common People category<sup>36</sup>. The third grouping of giving meaning to the category of people proposed by Menye and Surel is also the main analytical category of the book, hence postulated by the author and present since Roman times, and at the same time a contradictory two-part interpretation of the common people category into communes and ordinary people.

Focusing on this interpretative dichotomy Canovan largely omits the first two categories of understanding the concept proposed in their classification, which in consequence results in that her interpretation can in many cases be considered as unauthorized or as mere over interpretation.

I have already mentioned the simplifying treatment of the convergence of meanings of the words *demos* and *populus*, or even of the 1989 protests in East Germany, according to the Canovan, a populist popular revolt and not a conscious leap of society seeing a historical chance for unification. Defining societies in terms of the people as a sovereign or nation brings with it one more challenge that should be noted at this time. Namely, the connotation of the people with the whole society, i.e. the nation or with the sovereign, may in some cases be clearly pejorative. This is how the category had been interpreted in Central and Eastern Europe.

<sup>33</sup> M. Canovan, *Lud.*, p.10.

<sup>34</sup> *Ibidem*

<sup>35</sup> Y. Mény, Y. Surel, *Par le Peuple, pour le peuple: le populisme et les démocraties*, Fayard, Paris 2000.

<sup>36</sup> M. Canovan, *Lud.*, p.10.



Political, social and economic dependence of the so-called the Eastern Bloc from Soviet Russia after 1945 by introducing top-down economy systems, a system of real socialism, various types of mutual assistance systems such as the Warsaw Pact or the Council for Mutual Economic Assistance, in addition to measurable social and political consequences, it also gave new meanings to the category of people and has become synonymous with the imposed order. For example, the new name given by the Russian occupier for the Republic of Poland, i.e. the name People's Republic of Poland, which the ideologists of the new state intend to emphasize the social inclusiveness of a new political formation and the break of tradition as well as political continuity with the pre-war Polish state and its representation in exile instead of the intended connotation people with sovereign and nation evoked diametrically opposite connotations. The Polish People's Republic was connoted with a sovereign not accepted by the nation, and imposed by the authorities and a regime imposed from above, which the nation must resist. Apart from the facade, usually insignificant clichés, the hidden dictatorship of the Soviet Union was imposed by force. These negative connotations of the people with a false sovereign and misinterpretation of the category of the nation were common throughout the so-called Eastern Bloc. As the example above shows, allocating categories of people to broader community identifications or defining a sovereign can also be problematic, and the instrumentally used category of people has created an additional important negative interpretation of this category.

Returning, however, to several exemplifications discussed by Canovan, it can be stated that the French Universal Declaration of Human and Citizen Rights refers to the concept of a sovereign, similarly to the American Declaration of Independence, and in both cases an additional interpretative layer is imposed on these two basic interpretations, i.e. nation. The UN declaration of human rights universalizes the category of the individual. Admittedly, Canovan draws attention to this by talking about the extent of the interpretation fields of the categories of people in the introduction to her book, going beyond the categorizations of Menye and Surel. She notes, *inter alia*, that: "within the English-language discourse, the formation of the subject of interest in modern democratic politics was strongly influenced by the fact that "people " also refers to human beings as such, individuals in general."<sup>37</sup> Nevertheless, Canovan herself rather tends to the third category of understanding of the concept of the people and this is even abused by her. She does not seem to fully recognize the linguistic changes and the process that caused that today the use of the category of people as a descriptive category at least nudges the mouse and one could say that it is even pejorative or even unauthorized. Therefore, ultimately, the people are rather in the author's descriptions being seen as this category that evokes rather negative or very blurred definitions interpretations.

It should be mentioned however, that Canovan also sees the emancipatory potential of populism, noting that in some circumstances populism may not be interpreted as a threat to democracy, but as an authentic radical form<sup>38</sup>. This can happen when democracy as a system is widely accepted, but there is also a widespread feeling that its standards are not being respected<sup>39</sup>. Even though, the author is extremely skeptical in the development of this positively marked interpretative scenario and, apart from indicating such theoretical possibility, she practically does not present arguments in support of it. Although the author indicates that such an actor acting within the democratic framework of action may be "social movements", but these "are notoriously fluid [...] their duration in time is enabled not by organizational form but

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<sup>37</sup> *Ibidem.* , p.10.

<sup>38</sup> M. Canovan, *Populism.*, p. 172.

<sup>39</sup> *Ibidem*

by maintaining collective identity after political activity weakened<sup>40</sup>, therefore, the long-term effect of these effects on the system is usually unpredictable. She draws however attention to the fact that what distinguishes populism from democracy is the representativeness of the latter, and the radical form of democracy bypassing the legal procedures characteristic of securing parliamentary democracy systems is simply a threat to them<sup>41</sup>. The necessary condition postulated by Canovan for democratic affiliations of populism, i.e. its application as so-called a radical form of democracy in stable democratic systems is not as obvious as the author would like.

A good example of this ambiguities are contemporary political or social revolutions that accept various forms of pressure on anti-democratic systems in their actions. For example, the populist revolt in East Germany described by Canovan<sup>42</sup> (and in the broader context of the transformation in Central and Eastern Europe in 1989) was not an attempt to exert political pressure on a democratic system but on an authoritarian one.

Nevertheless, the author must be right that populism can and / or is, however, as the author emphasizes many times, a dangerous tool and skillfully used politically instead of the expected change for the better, it can confirm the status quo. In support of his thesis, Canovan gives examples of populist dictatorships or the introduction of undesirable changes due to the wider public interest through the use of populist rhetoric. In this case, the rhetoric of "majority voice" imposed by ideologists become an uncritical tool for publicizing beliefs contrary to the democratic understanding of social participation<sup>43</sup>. Canovan, however, does not display the positive features of the phenomenon. She does not specify in her work too precisely of one of its definitive features that may affect its affirmative assumptions. It is about the feature of populism, which is its definitive property, i.e. the fact that populism appears as a reaction to marginalization, improper consideration in political practice, or even exclusion of the interest of the majority (differently formulated depending on the situational context) by the elites, who, for various reasons, usually perceived by the discredited majority as the particular interests of the elite, do not want to take those interests into account. Populism is therefore the reaction of the majority (taking various forms) to discredit its vital interests.

Canovan identifies the majority with everyone who does not form an elite<sup>44</sup>, so her dichotomous division is essentially simplistic. In addition, populism is above all, according to her a threat to representative democracy<sup>45</sup>. Contesting the democratic safeguards developed by democracy systems over its development, such as representativeness, tripartite division of power, minority rights, a legislative process that is spread over time, populism is, in her opinion, an attempt to push through participatory democracy the characteristic of the late Roman Republic such as public debate or direct pressure, today, in societies whose level of specialization is much higher than in the societies of the ancient world. However, Canovan does not interpret populism as a warning signal, in other words the proverbial litmus test, showing the irregularities of social life that need correction. Even if such a correction occurs, it consists in destabilizing the social system and will not restore its lost stability. Good intentions, but poorly applied actions are a 'recipe' for a social catastrophe and this understanding of populism prevails in Canovan reflection on populism. Canovan is consistently

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<sup>40</sup> M. Canovan, *Lud.*, p. 159.

<sup>41</sup> *Ibidem.*, p. 104.

<sup>42</sup> *Ibidem.*, Pp. 9, 153, 160.

<sup>43</sup> M. Canovan, *Populism.*, p. 13.

<sup>44</sup> M. Canovan, *Lud.*, p. 83.

<sup>45</sup> *Ibidem.*, p. 104.

sticking to this one sided interpretations and in consequence discrediting in any way the positive connotations and social functions of this phenomenon.

In my opinion, however, populism as a social phenomenon has another invariable defining feature. It is the abovementioned general opposition to social processes that create anomalies or even pathologies that affect the functioning of the system. One should look at them and take corrective action. It can be, for example, a clearly defined opposition against the social status quo, against social underdevelopment and its consequences, rapid social change outside the framework of accepted changes, or opposition against social or political elites that do not represent communities (i.e. us citizens) defined here as a majority.

It must be admitted, however, that the author is partly right in drawing a pessimistic picture of the phenomenon, especially regarding the categories of populism she proposed, i.e. reactionary populism or populism of politicians. Admittedly, these categories in many places are convergent or even identical and rather obscure the entire definition process rather than make it more transparent. On the other hand, however, it has repeatedly happened that attempts to correct the functioning of social systems destabilized them and did not restore their lost stability of functioning. For example, the instrumental use of Italian dissatisfaction after the outbreak of World War helped Mussolini to take power in Italy, and in the face of the great crisis of the late 1920s and 1930s, the social masses brought Hitler to power. In both cases, the reference to the unifying slogans of unity and national cohesion above class divisions were used by cynical demagogue leaders to seize all power and authorize social systems. Also contemporary right-wing populism, which is often the reaction of a social group dissatisfied with the current state of affairs, looking for easy solutions to the problem without asking about its causes, connotes a negative perception of the phenomenon in social discourse. This is the case, for example, with German Pegida and its anti-immigration rhetoric looking for easy solutions and clear lines dividing us - the community and their - strangers, without asking about the structural sources of the migration challenge<sup>46</sup>.

Therefore, one should ask again how to read Canovan? The answer is simple and is this – critically. Talking into consideration all above presented argumentation author of this article concludes that although Canovan present one important site of dialectical interpretation of the phenomena unfortunately she biases on another.

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## THE POTENTIAL BENEFITS OF URBAN MARKETING: ECUADOR CASE STUDY FROM A SOCIOLOGICAL SPECTRUM

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### **Abstract**

The local government has become over-extended in the economy. After several years of centralized territorial planning, there are a competition between cities and territories, both in the national and international arena. The competition is open to attract public and private investments of multinational companies and nowadays is considered the main objective of many local governments. This research contributes to our current understanding of the role of locality in public management and describes the theory and practice of urban marketing as a greater engagement with governance in order to explain some of the processes and patterns of Foreign Direct Investment (FDI) and Public Private Partnership (PPPs) for the development of cities. Urban marketing is a fundamental support for these. Citizens, businesses, governments and employees are a policy priority because cities are key factors for the new industrial scenario to converge all segments of society. In addition, the paper presents the Ecuador case study from a sociological spectrum to recognize the social impacts on social groups within a community in advance of the decision making process such as quality of housing, local services, living environment, cultural and political inclination, transportation condition, etc.

**Keywords:** urban marketing, local government, locality, FDI, PPP, Ecuador

### **Introduction**

Economic, social, cultural and political perspective has policy-consistency implications for the international community. Role of locality in public service management is the result of distinct goals in different policy areas. The objective of this research is to explore the potential benefits of urban marketing in Ecuador.

Ecuador is a country whose prosperity was typical of a petroleum-producing country. However, after the collapse in the price of crude oil in 2014 and an earthquake of 7.8 Mw; governments of all levels, whether national, provincial or municipal, face multiple and interdependent challenges in managing scarce assets with the objective of creating opportunities for all citizens.

Ecuador is a unitary state, with a two-tier structure of decentralization. The country is divided into 24 provinces (Provincias) which are formed by one or several canton. According to the Constitution of Ecuador (2008), these provinces may also gather to create an autonomous region, but with only geographical significance. Furthermore, depending on, the Decentralization methodology in Ecuador, the lower level is constituted by 221 municipalities called Canton or Municipios, these entities are further subdivided into around 1500 parishes

(parroquias) which are small politico-territorial divisions that may be classified into rural or urban parishes. They are under the authority of a municipality which has the power to create or modify them. This subsidiary tier of decentralization aims to be an intermediary between people and municipalities.

Municipal Level	Intermediate Level	Regional or State Level	Total Number of Subnational Government Responsibilities
221 Municipalities + 1 Metropolitan District: Distrito Metropolitano de Quito (capital city)	-	24 provinces	243

Table No. 1: Territorial Organisation and Subnational Government Responsibilities

Ecuador, as many other countries in South America, tries to increase the influence of Foreign Direct Investment (FDI) on its development, not only attracting it in larger quantities, but also benefiting from it in the areas of technology, employment, exports, qualifications and in general the competitiveness.

The country has many attractions for foreign investors, which with appropriate policies, can be transformed into opportunities. First, it has abundant natural resources, including oil and mining.

In the section, urban marketing approach from a sociological spectrum the role of locality in public management shall be in the focus. Public policies in Ecuador and governance initiative to the construction of an image from Ecuador would be both examined in order to have an understanding on both directions that concern the country and its social development. Most importantly, the objective is to identify the main factors that attract to invest in Ecuador under the umbrella of PPPs and analyse the most important factors including the decision of companies and investors to build projects in Ecuador. For example, quality of housing, local services, living environment, cultural and political inclination, transportation condition, etc.

Finally, in the section the potential benefits of urban marketing in the local governments of Ecuador. Local governments will be analysed in order to understand local policies that drive authorities in their FDI decision. The methodology used is secondary data sources have been reviewed including various types of books, journal articles, government and non-governmental reports, government implementation plans.

## 1. Literature Review

Research on urban marketing began in 1988 but on urban tourism focus. Greg Ashworth's was one of the first to write about place marketing. In 1988, he published with Henk Voogd their first article about urban tourism and in 1990, they published the book *Selling the City* (Ashworth et al. 1990). This perspective place branding as an instrument of cities management and recognises that place products remain places with the distinct attributes that accrue to places, such as spatial scale, spatial hierarchies, resulting scale shadowing, the inherent multiplicity and vagueness of goals, product-user combinations and consumer utilities. The literature on urban tourism continued to grow in the 2000s. However, there are the necessity of a comprehensive city brand management (G. Ashworth & M. Kavaratzis, 2007).

The main author Philip Kotler started to introduce that cities going bankrupt, states running large deficits, and nations stuck in high debt and stagnation. Altogether, Philip Kotler, Donald Haider, and Irving Rein argue that thousands of "places" - cities, states, and nations - are in crisis, and can no longer rely on national industrial policies (Kotler et al.1993). This theory clarifies the reality of Ecuador and its neighbours' countries in Latin America. On the other hands, the authors show instead that places must, like any market-driven business, become attractive "products" by improving their industrial base and communicating their special qualities more effectively to their target markets. They show how "place wars" - battles for Japanese factories, government projects, Olympic Games, baseball team franchises, convention business, and other economic prizes - are often misguided and end in wasted money and effort.

In this sense, urban marketing is seen as a political mechanism to attract FDI. However, an overview and analysis of the increased presence of investors in Latin America (Vodusek, 2001) also corporate investment strategies in the majorities of South American countries; presents how Foreign Direct Investment (FDI) in Latin America and the Caribbean rose to unprecedented levels.

Urban sociology (Saunders 1986) was mainly interested in social organization and human interaction in metropolitan areas. Its object is social processes that could arise. Indeed, Henri Lefebvre's theoretical contribution was more complex and complete. For this French author, the notion of production cannot be limited to economic production, but accounts for processes: social practices, sometimes conflicting relationships between groups, representations in social and spatial organization. His famous phrase: "(social) space is a (social) product" is the result of a reflection on the space that has been inhabited throughout history.

In this context, the application of place marketing is largely dependent on the construction, communication and management of the city's image (Mihalis Kavaratzis G. et la. 2015).

For this research, Ecuadorian current case study of Public-Private Partnership is experiencing growth and in almost all the South American region too. In Ecuador, the decree N° 582 Public Private Partnership (Asociación Público Privada) in 2015 is the most important document for future investors. Furthermore, the Constitution of the Republic of Ecuador that was adopted in 2008.

## 2. Urban marketing approach from a sociological spectrum

There are several new dimensions and theoretical contributions to urban marketing. Since the late 1980s when Ashworth (1989) first analysed the urban tourist phenomenon to begin to understand tourism in the city and embrace urban studies and its theoretical critiques (G. Ashworth & S. Page, 2011).

The construction of an image connotes a sense of direction in the capacity of action of the government by means of steering. Nevertheless, its difficulty to assign a sole definition to urban marketing, since this term changed from being descriptive to being analytical.

Urban marketing has become a central concept which could be used by politician people at the local level, national, regional, and global, and by social sciences too. The influence of globalization on the international system and on national political systems has been considerable in establishing levels of governance. International organizations spread preponderant criteria of normative criteria of good governance from a neoliberal approach to a regulationist.

The analysis of the public policies takes the set of devices as an object of study shaped for: the collective aims that the State considers to be desirable or necessary (including the process of definition and of formation of these), the means and actions accused, total or partially, for an institution or governmental organization, and the results of these actions, including so much the consequences wished as the unforeseen ones (Roth, 2007:27).

Promotion of urban marketing goes beyond the local government and includes private sector and society. There are two moments: the rule of law, so much as the Constitutional state from which it emanates are subject to the rights of individuals; and the second being the recognition of several normative systems different from the law produced by the parliament, consequently multiplying, the sources of law.

In Ecuador, the construction, of a paradigm of "equitable socioeconomic development" has allowed the birth of public policies that place inside a normative frame of a constitutional State governed by rights, with the configuration of a Constitution of rights, whom proposes herself a National Development Plan for the search of "Well Being".

National Development Plan for the search of "Well Being" is focused in the reduction of the poverty by means of the equitable distribution of the wealth and the sustainable and sustainable managing of the natural resources, expiring with the first central element for the existence of a public politics, the implication of the government.

In fact, urban marketing will be helpful for introducing public policies management in Ecuador; in the national centre of excellence for the research of public administration that meets the highest standards of the international scientific community. In all the aspects, of public and private life; "branding" is a significant effort that signifies spend money in urban marketing strategies to be crucial in regional management and development. Global statistics clearly show countries spend money in public funds on branding strategies to attract FDI.

Finally, although it is true, there does not exist a model of good governance which will directly bring FDI in the countries, good governance shall definitively be an agenda for countries participation, and social impact that shall be analyzed in this field.



### 3. The potential benefits of urban marketing in the local governments of Ecuador

The potential rise of the private sector shapes urban dynamics (Bassand et al. 2001) there are witnessing a privatization of services, an increasingly marked power of multinationals over the states and even over the exercise of citizenship in a relationship of clients and service providers with all its consequences in terms of social and spatial inequalities.

In Ecuador the local government considers a combination of local and international public and private investment, including official development assistance and FDI it is important to mobilize investment, create jobs, etc.

However, there is a heated debate about the effects of FDI on development (Willem te Velde, 2003). Proponents argue that FDI is good for development and therefore perceive the rapid expansion of FDI in Latin America is seen as manna from heaven (Vodusek, Z.,2002). In some cases, critics contend that FDI leads to increased poverty, isolation and a neglect of local capabilities (Vial, J., 2001).

Ecuadorian government is promoting PPPs and establishes that national and foreign investors must be treated equally before the law and should be granted the same rights. Every investor has the option to apply for a contract with the Ecuadorian State, which grants stability for 15 years, extending to an additional 15 years. The minimum investment amount of the contract is US \$ 250,000 during the first year.

The Andean country of 17 million of inhabitants, has adopted a new decree N° 582 Public Private Partnership (Asociación Público Privada) on 2015. This relationship that consists of shared and/or compatible objectives and an acknowledged distribution of specific roles and responsibilities among the participants which can be formal or informal, contractual or voluntary, between two or more parties. The implication is that there is a cooperative investment of resources and therefore joint risk-taking, sharing of authority, and benefits for all partners (Lewis 2002).

In this case, the Inter-organizational relationship; Shared objectives; Mutual investments, Risk sharing, Benefit sharing are the main characteristics of PPP. The importance of structural and locational characteristics on the prices guarantee the interest in the countries (D DiPasquale & WC Wheaton, 1996).

The image of Ecuador is under the relation between economy and society for example the nature of economic transactions become mutually constitutive (D Hiebert, J & Rath, S Vertovec, 2015). And the relation among public management and urban marketing shall be analyzed as an attempt is made to situate contemporary urbanization processes within the capitalist mode of production (AJ Scott & ST Roweis 1977).

Effective local government can be a catalyst for development (Herrera 2013). This stipulation has also been taken up into a specific law: Código Orgánico de Organización Territorial, Autonomía y Descentralización [Organic Code for Regional, Autonomous and Decentralized Organization] – COOTAD.

Decentralized Autonomous Governments have the support of the Association of CONGOPE (Consortium of Provincial Governments of Ecuador) Regions and the Association of Ecuadorian Municipalities (AME). For example, the competence of managing international cooperation has been transferred to the sub-national level in 2011 through Resolution No. 0009 of the National Council of Competences, which resolved to: “transfer and implement the

competence of managing international cooperation for obtaining grants and technical assistance in order for Decentralized Autonomous Governments to comply with their competences” COOTAD.

Under the premise of decentralization, the current context in Ecuador is very favourable for designing a tool to measure the effectiveness of urban marketing under the figure of FDI at the local level, for the following reasons:

- Ecuador has a Law Executive Decree No. 793. includes regulatory amendments relating to taxation matters for application of the Law on Incentives for Public-Private Associations and Foreign Investment. Income tax exemption on dividends paid by companies incorporated for purposes of PPAs projects is applied during the first ten years after operational income is generated.
- Sub-national governments have already had experience working with international cooperation agencies, through which contributions have been made to local development processes. For example, United Nations Conference on Trade and Development (UNCTAD) and its Investment Promotion Agencies.
- The Constitution of the Republic of Ecuador and the corresponding legal framework states that the management of international cooperation is a competence of sub-national governments.

Inter-American Development Bank considers Ecuador is a “Nascent” PPP environment. However, one of the most relevant ports on the west coast of the South America placing Ecuador by DP Port, Metro Quito and other important projects.

#### **4. Conclusions**

Besides investigating the reasons of urban marketing approach, it is also the aim of the study to examine the impact of public management in Ecuador. The impact of public policies and the role of locality can also be visible on the economy and social life in the country.

To understand urban economic development and the limitations of urban marketing we need to understand the question: the urban question denotes how the means of collective consumption (e.g. housing, roads and schools) is provided, managed and distributed in cities (Castells, 1978).

The main objective of urban marketing is that of creating a strong relation between public policies as consumer requirements to make the functioning of urban system more efficient. Hubbard and Hall argue that local government not only is a provider of welfare services but also try to promote and encourage local growth and economic development.

A growing theoretical approach is nevertheless using the concept of marketing to illustrate that Western cities apply marketing ideas originating from the economic sphere in the urban context (Millington et al. 1997).

Based on this access and the advantages comparatives of the country, Ecuador managed to develop several export industries in the 1990s of commodities with the possibilities of FDI. The greatest immediate potential, in addition to the oil industry, is offered by the services sector, and especially infrastructure services industries such as telecommunications and electricity distribution.

The participation of FDI in the privatization programs of these industries has periodically stimulated FDI inflows in several Latin American countries including in Ecuador. Furthermore, Ecuador has stable and successful policies that offer confidence and benefits to foreign investors. Investment Promotion Agencies are the institutions responsible for promoting foreign investment in a specific area. These types of institutions may be governmental, non-profit organizations and even private entities run by boards of directors, which may include government officials and business managers. Therefore, one of the main activities of an Investment Promotion Agencies is the positioning of the country in the international market, a task that implies the construction of a favourable image, and with this, the creation of a “Country Brand”.

On example of an appropriate and favourable image of Ecuador for FDI is Port Posorja in the province of Guayas. DP World is a world leader in global supply chain solutions and DP World is a global terminal operator at ports around the world. Formed in 2005 by the merger of Dubai Ports Authority and Dubai Ports International. This largest established the development of a deepwater port in Posorja, was being executed jointly by the public and private sector. The public is represented by the central government of Guayas province while key contractor is DP World Posorja. This partnership enables growth opportunities for the community of Posorja as well as for the contractor while the government retains oversight control.

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## HISTORY OF MUSEUM HERITAGE IN KOSOVO

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### **Abstract**

The museum heritage began to reflect all the advancements created by ancestors in the fields of culture, art, science, tradition, means and living conditions, enriched through generations. Objects of material and spiritual values inherited from the past were consciously incorporated into the peoples' national wealth. Heritage, based on inhabited historical centers [ruins or complete constructions], artifacts, archival documents of archaeological, historical, ethnological, architectural and engineering value, as well as specific elements of language, folklore [vocal, choreographic, instrumental], customs, beliefs, tradition, today attests to the national and cultural belonging of the people. It gives meaning to the lives of people who live in their lands and are the cornerstone of tradition and origine. The evidence of the times today are focused on museums, to become elements of the education and publication of national and human values. This paper deals with the historical side of the creation and development of museums in Kosovo, from the first private collections to the establishment of museums as public and national private institutions. Characteristic features of the preservation of this precious property generation after generation, in the face of the impacts and consequences of the occupations, regimes that have passed in Kosovo, give a new dimension to national consciousness, which has left its mark today, aiming at primary objectives with its educational character.

The material is not of a descriptive nature, but in an analytical and comparative method brings to the study the facts on the history of Kosovo's museum heritage, based on facts.

**Key words:** Museum heritage, museum activity, museum treasure, study, protection, exposure, promotion, museum administration, collections, museum, exhibition, contemporary, contemporary international standards, ICOM, retrospective, perspective, museology, project, museum ethics, museologist etc.

### **1.1. First interests in the field of museum heritage in Kosovo**

The historical past best demonstrates that Kosovo became an arena of sensational war events that transcended national spaces. This happen due to the interests of the Great Powers of the time. For this reason, its cultural heritage has been greatly damaged, looted and alienated. Within its spaces peoples moved with their own cultures, enabling here to combine some of their cultures and traditions with traditional Albanian culture. This has influenced that Kosovo's cultural heritage is diverse and rich. Thus, over this area was laid a great treasure of cultural-museum heritage, from the Illyrians as an indigenous people, and later from the Roman,

Byzantine, Slavic, Ottoman etc.<sup>1</sup> The first museum treasures were created, preserved and developed from earlier times and have evolved in various ways and forms to the present day. The relics found prove that the best preservers of the museum treasure in Kosovo were: cult objects, early Paleo-Christian medieval churches and monasteries, mosques, temples, tombs, as well as from the feudal families. Exhibits of high museum value, fanatically preserved, out of love for the ancients, were: the various personal belongings of the family; weapons and other religious and secular relics. Like the European peoples, the Albanian people showed particular interest in preserving cultural heritage. Tradition in this field shows that many monuments today are among the most valuable realizations of European and world civilization and culture.<sup>2</sup> According to historical sources, the first traces of cultural - museum heritage in Kosovo date back to the (Illyrian) period of the II - III centuries. s., culminate with the medieval period of the 13th century. The name Artana (Novobërda) in the literature, according to historical written sources, is mentioned as a settlement since the IX century and in 1326 is known as Nuovo Monte. While the name Trepca, in the archives of Dubrovnik (Ragusa) and in the Ottoman archives, which are preserved today, is first mentioned in 1303. These settlements in the 13th and 17th centuries are known for their social, political and economic development, especially for the development of the Artana (Novobërdë) mine, which was rich in gold, silver, lead and zinc. According to the data, in 1450 the Novobrdo mine produced about 6000 kg of silver per year and exactly these underground - natural treasures that make Novobrdo one of the most famous European and world countries.<sup>3</sup> This historical overview, among other sources, also confirms many discoveries of old mineral works, such as: wells, galleries, working tools, used at various times during the exploitation of minerals of this kind, as well as other remains from their melting.

These assets would later be used by the Ottoman Empire until the beginning of the 20th century to continue later on with the English (1924 - 1939), Germans (1943 - 1944) and Serbs (1945 - 1990).<sup>4</sup> The material and spiritual ethnoculture of Kosovo is a very rich heritage that has been developing since the XVIII century. This field summarizes details from ancient history that date back until today. The treatment of this field in the museum dimension necessarily leads to the treasures of the material and spiritual heritage treasures. This section began to develop especially after the end of World War II, when most of it was preserved in the people.<sup>5</sup> The first efforts in the field of archaeological heritage in Kosovo date back to the 19th century, with English archaeologists Martin Leake, Sir Arthur Evans and French archaeologists Pouqueville, L. Heuzey. In the 20th century it was albanologist C. Patsch. In the World War I Austrian archaeologists, Buday Arpad, C. Praschniker, and A. Schober were distinguished. Between the two world wars, Serbian-Yugoslav archaeologists of the SKS Kingdom period traced in Kosovo. As the country (Kosovo) was under occupation, throughout the aforementioned period, results in this area were lacking. During World War II until 1999, in archaeological

<sup>1</sup> Mr. Morina, Tefik, *Rruga e zhvillimit dhe perspektiva e muzeve të Kosovës*, "Buletini i Muzeut të Kosovës", nr. XII", Prishtinë, 1974, f. 216 - 217.

<sup>2</sup> Mr. Sadik Krasniqi, *Zhvillimi i Muzeologjisë në Kosovë*, Instituti i Trashëgimisë Shpirtërore e Kulturore të Shqiptarëve, "Studime Albanologjike" nr. 5, Shkup 2012, f. 185.

<sup>3</sup> Arben Llapashtica, *Trashëgimia kulturore dhe turizmi rural*, "Novobërdë", katalog, studio Neuberg.

<sup>4</sup> Prof. as. dr. Bedri Durmishaj & Prof. as. dr. Sylejman Hyseni & Mr. sc. Ferat Shala, "Atlas i mineraleve të Trepçës", 2010, Mitrovicë, f. 12,13, D. Demaku "Lufta për Trepçën" (sipas dokumenteve britanike). Ed. Instituti Kosovar për Integritet Euroatlantike, 2002 Prishtinë. J. Feraud "La mine de Trepca, son histoire, sa géologie etses minérales. Website of the Geopolis Federation of the French Associations of geological heritage, www.nd\_http: [www.geopolis - fr.com/art 30 mine -Trepca -mineraux mineralogic.html](http://www.geopolis-fr.com/art30mine-Trepca-mineraux-mineralogic.html).

<sup>5</sup> Mumin Zeqiri, *Çështje etnologjike në Muzeun e Kosovës*, "Studime muzeologjike", Tiranë, 2003, f. 73-76.

research were mainly engaged Serbian-Yugoslav archaeologists. This situation changed after the end of the war in Kosovo, with the arrival of Albanian experts in the field of cultural heritage, such as: archaeologists, ethnologists, historians etc.<sup>6</sup> Kosovo has a precious treasure, starting from collections of churches, medieval monasteries, such as the Decani Monastery, Patriarchate of Peja, Gracanica, etc. Decani Monastery Treasury is one of the richest and most preserved in relation to other churches and monasteries. Inside are noble metal objects, rare manuscripts, a rich collection of crosses dating from the 14th century, a 15-piece glass collection, all of them silver, from which the most beautiful is the glass of the Metropolitan of Novobrd, donated to Decani in 1593. Collection of lamps, consisting of 100 pieces, made of silver, belonging to the XVII, XVIII, XIX centuries. The collection of icons of the XVI - XVII centuries, the most important of which are: icons of the biography of Stefan Decan and the most beautiful icon of St. Mary of Pelagonia with Christ in the lap, etc. From the woodworks, the most important is the carved, silver molded sarcophagus dating back to the fourteenth century. Whereas two other sarcophagi carved during the 19th century are works of Dibra masters and others. The Treasures of the Gracanica Monastery consisted mainly of the following collections: icons and manuscripts, featuring the icon of Christ, the terrible judge, and the icon of the evangelist Luke from 16th century. Manuscripts, 17 in all, 20 excerpts from the fourteenth and seventeenth centuries. The Patriarchate of Peja also had rich treasures, but the events of the Austro-Turkish War (1683 - 1689) were tragic even for the rich collections of this church.

The Turks, under the leadership of Jegen Pasha, in 1688 found the wealth of this hidden treasure in a dome of Gracanica and took it entirely with them. The Peja Patriarchate was known for its collection of icons, a collection of noble metals made up of several crosses made in the 17th and 19th centuries. In this context, an interesting rarity is the cliché of this wood-carved treasure, which was worked by Haxhi Ruvim Neshkovic, Archimandrite of the Bogovata Monastery of 1797.<sup>7</sup> Turkish rule at the end of the 15th century caused major changes in the Balkans, including Albania and Kosovo. On this occasion, the influence of Ottoman culture spread rapidly, as in customs, architecture, costumes, especially in those countries that embraced Islam. Since this period in Kosovo a large number of monuments and objects of Ottoman architecture have been preserved, such as: mosques, shrines, tekke, hammam, bridges etc. Many of these objects in the interior contain various museum collections, mainly of Muslim religious rite. The Mosque of Mehmet Pasha in Prizren and its library have the greatest wealth of cultural and museum values of ancient Islamic manuscripts in Kosovo. The collection of Islamic manuscripts of this mosque contains over two thousand copies and a copy of the Qur'an, written in 1312, which is considered the oldest of the manuscripts in it. In this Qur'an we have notes in Arabic, which also speak of Sinan Pasha, who left a last will in 1589 for the Mehmet Pasha Mosque in Prizren. Some manuscripts of this library are among the masterpieces of Arabic calligraphy and oriental decorative art. There are some interesting works with scientific character, such as: history, mathematics, philosophy, medicine, astronomy, etc. There is also a copy of the CANON of the most famous Arabic medicine author, Arecena (Ibni Sinait). Collections of Islamic manuscripts are preserved even in other mosques in Kosovo, such as Hadum Mosque in Gjakova, Vakefi Council in Pristina, Mitrovica, Gjilan etc. The collections of "Turbe" in Kosovo are: The Tomb (Turbe) of Sultan Murat II, the foremost, which has a valuable collection, such as in manuscripts, cold weapons, etc. All these collections were destroyed and looted by the Bulgarian army during II World War. In the Turbe of Gazimestan (Bajraktari), there was a poor collection, but it was greatly damaged.

<sup>6</sup> Gazeta e përditshme "Koha Ditore", Prishtinë, 17. 05. 2008.

<sup>7</sup> Ibid, f. 185 – 186.

Some of them are: coverings, carpets, candles, candlesticks, Quranic fragments, etc. The tekke collections in Kosovo consist mainly of old Islamic manuscripts, especially dervish tarik, various items, weapons and textiles. The fund of works of Haxhi Ymer Lufti Paçarrizi (1896 - 1929) from Prizren exists and is preserved, who in his writings represented socialist ideas and supported the October Socialist Revolution. At the Melamie Tekke in Rahovec, he worked and preserved his works Sheh Hilmi Maliqi (1865 - 1928), which is considered the leader of Albanian poetry, along with Shaip Zhurnaxhi (1884 - 1951). Collections of books, as well as religious tools, weapons and more have been everywhere in Prizren, Rahovec, Gjakova, Peja, Gjilan etc.<sup>8</sup>

### 1.1.1. Kosovo's first private museum collections

Private collections, as elsewhere in the world, are presented for the first time in our country to the clergy and wealthy feudal lords who held power in their hands. Alongside these categories, there were other collections, preserved in ordinary families. The latter kept their collections more in love with their relatives and heritage than aware of the museum values they could represent. Generally, in these collections, valuable exhibits were preserved as personal belongings of the country's renowned personalities; various weapons and traditional clothing; various notes and documents written in the time context. Museum collections first appeared in the second half of the eighteenth century. During this time, they were consciously gathered with the good intention of preserving and exposing them to family guests, as well as to other visitors to society, who mainly represented a "high degree" of emancipation.<sup>9</sup>

### 1.1.2. Gjinolli family museum in Pristina

The first museum collection in Kosovo was the Gjinolli family museum in Pristina. Residents of that time called it the "Ancient Tower". The Baileys Museum (rich, feudal) Gjinolli, of Albanian origin, was articulated as the most interesting cultural and historical institution we know of, resembling European feudal yards. The members of the Gjinolli family were; Maliq Pasha, Jashar Pasha, Fuad Begu etc. These knowledgeable progeny have exhibited in their private museum exhibits of historical and ethnological character, old weapons, such as jatagans, sword-cords, rifles, guns and other military equipment (among them relics was gelatin, with which Jashar Pasha's executioner beheaded). There were exhibits of ethnology, made of textiles, such as the different bedding. With the occupation of Kosovo by Serbian forces in the First Balkan War, this museum was looted and completely destroyed in 1912.<sup>10</sup> In addition to this museum, there have been several others, such as; The important collection of the Bashota family in Prizren from 19th century, which took the form of a museum and opened to visitors in 1974, followed by the collections of the Albanian feudal family of the Begolli in Peja, the Draga family in Mitrovica etc .<sup>11</sup>

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<sup>8</sup> Ibid, f. 186 – 187.

<sup>9</sup> Kadri Halimi, *Mbi rolin, perspektivat e muzeumeve në Kosovë*, "Përparimi", nr. 1 - 2, Prishtinë, 1955, f. 55 -56.

<sup>10</sup> Mr. Shefki Stublla, *Komunikimi muzeor - I*, Prishtinë, 2012, f. 53.

<sup>11</sup> Mumin Zeqiri, udhëheqës i Sektorit të Etnologjisë në Muzeun e Kosovës, të dhënat i dha më



### 1.1.3. Dimitrije Paramendic's Museum Collection in Pristina

This private museum collection was considered the second continuation of the museum in Kosovo, founded by Dimitrije Paramendic. In 1936 he opened the exhibition with 80 works of art, mainly sculptures and paintings. He describes the opening of this exhibition in the following words: "Museum opened in Pristina". This exhibition represents his first efforts to open the Museum of Contemporary Art. Meanwhile, two years later it is mentioned the popular museum "Kosova", which included the former museum of contemporary art. Meanwhile, two years later there is a mention of the popular "Kosova" Museum, which included the former Museum of Contemporary Art. From this museum base, the Provincial Museum of 1949 would later be established. The museum's collections were mainly of ethnography and numismatics. The collections in question, called the Museum of Contemporary Art and the Museum of Folk Art, were destroyed during the time of the NLW (National Liberation War) (1941 - 1945). After the war, Paramendic continued his work in collecting museum materials, especially artistic creativity. In 1956, Paramendic opened the Art Gallery in his home, known as the "Bozhurja e Kosovës". All of his works mainly had motifs from Kosovo and his hometown, Pristina. He opened the art gallery in his home and later donated it to the city.<sup>12</sup>

<b>Collections and Museums established in Kosovo from XVIII century until II World War</b>	<b>Number of collections</b>	<b>Number of Museums</b>	<b>Their profile (Typology)</b>	<b>Establishment year</b>
Museum of Gjinalli family in Prishtina	-	1	Ethnology	1912
Museum collections of Bashota family in Prizren	-	1	Ethnology	XIX century
Museum collections of Begolli family in Peja	-	1	History-Ethno	XIX century
Collections of Draga family in Mitrovica	-	1	History-Ethnology	XIX century
Collections of Dimitrije Paramendiq in Prishtina	-	1	Art	1936
<b>Total</b>	<b>Destroyed</b>	<b>5</b>	<b>various</b>	<b>1912-1936</b>

Fig. 1 Table which reflects statistics of museum units from XVIII century until beginning of the II World War

20. 12. 2011, Prishtinë.

<sup>12</sup> Mr. Tefik Morina, punim i cituar, f. 239 – 240.

## 1.2. Spread of museums in Kosovo after World War II

Kosovo's museum heritage has its institutional origins after the end of World War II, namely the establishment of the Kosovo Museum in 1949, known as the first [general] complex Museum with the central character in Kosovo. He served as the main representative and generator of the dissemination and development of museum activity throughout the museums of the Republic of Kosovo. "At this time begins the spread of the museums network in Kosovo in central, regional, municipal, village level until private collections".<sup>13</sup> The analytical study of this period is of particular importance due to the interplay and impacts of the Serbian-Yugoslav system on the values of Kosovo's cultural heritage, aiming to its disappearance, acquisition and alienation. This intent entirely permeates the study material, highlighting the negative aspects of this intervention and the serious consequences it has had on Kosovo's museum values. The state of the museum network, compared between the two periods, brings with it some features which as a whole reflect a typical phenomenon in the consciousness of the Albanian people in Kosovo. We have a situation unchanged for half a century in the federal state and a widespread museum movement after the liberation of Kosovo. The analysis of this period examines the historical side of the creation and condition of 12 museums objects in Kosovo after World War II and the completion of this network with 7 other museums as a reflection of the patriotic and liberating activity after '99. Despite the historical character of the birth and spread of the museum network in Kosovo, despite the numerical growth, according to their treatment, in the post-World War II period it results in a formal, lukewarm sector, leading to gradual collapse and demolition due to ethno historical discrepancies with other peoples of the former Yugoslav federation. Cases of looting, burning and destruction, especially of objects of value in national history, the tendency to give political coloring to ethnocultural values present the Albanian museology in Kosovo in the period between its birth and its alienation in the interest of state policies. The peculiarity of this treatment is the fact that the sector began to rise and operate, to take up dimensions in the Albanian-inhabited areas, moving the national consciousness to fanatically preserve this precious national wealth. The complex treatment of the origins and spread of the museum network in Kosovo after World War II deals in detail with the museum facilities, which are classified by typology, facility and infrastructure conditions, collections and events in decades, which explain in a concrete way the difficult path of museology in the federal system. The grave consequences caused by the political system are living proof of the situation inherited after the liberation of Kosovo. In its administrative superstructure, run by Serbian officials [specialists and non-specialists], the museum network was subjected to a dictated treatment with devastating effects, departing from its historical and educational mission. Today, this great wealth of Kosovo's historical cultural tradition is being restored thanks to the institutional care and passionate and professional work of Albanian museologists. Museums that were established and operated in Kosovo between 1950-1999, e.g.

### 1.2.1. National Museum and museum network

According to a document found (facsimile of the statistical list of the establishment of the Museum of Kosovo), it proves that the first museum institution in Kosovo was founded in 1947, but, in some other sources so far, it is said that the Museum in question was founded in 1949.<sup>14</sup> It is the first of its kind in the territory of Kosovo, dealing with professional and

<sup>13</sup> Raport pune, Hulumtime kërkimore në terren rreth realizimit të projektit me titull: "Ndërtimi i databazës me të dhënat e muzeve të Kosovës", Tetor 2012, Sektori i Historisë në Muzeun e Kosovës, Prishtinë.

<sup>14</sup> Dokument, Raport mbi punën e Muzeut dërguar Ministrisë për Arsim të RP të Serbisë (Faksimile e listës

scientific work; with the research, preservation and presentation of movable cultural-historical heritage, from antiquity to the present day. The museum began its activity with the ethnographic collection, but later became a multidimensional museum, creating other collections of history, nature and archeology.<sup>15</sup> The National Museum of Kosovo has a total fund of 60 thousand exhibits.<sup>16</sup> Listing chronologically by years of establishment, the following will present the network of other museums that are: Gjakova Regional Museum, Mitrovica City Museum, Trepca Minerals Museum in Stanterg, Monumental Complex of the Albanian League of Prizren, Museum of Criminalistics at the Faculty of Law of Pristina, Archaeological Museum of Prizren Region, Museum of Electroeconomics of Kosovo, Haxhi Zeka Historical and Industrial Complex, in Peja, Prishtina Regional Museum, Skenderaj Regional Museum.



Fig. 2 Building of the National Museum of Kosova

Museums and collections established in kosovo after II World War until 1999	Number of collections	Number of Museums per units	Their profile (Tipology)	Establishment year
Kosovo National Museum	60.000	4 units	general	1949
Regional Museum in Gjakova	8.730	1	general	1951
City Museum in Motrovica	1.886	1	general	1952
Trepca Minerals Museum in Stanterg	1.560		Nature	1964
ALP Museum in Prizren	1.159	1	general	1968

statistikore të themelimit të Muzeut të Kosovës), Arkivi Shtetëror i Kosovës (ASHK), Prishtinë.

<sup>15</sup> Vasilije Kozarac, *Muzeumi i Kosovës-Metohisë*, “Glasnik Muzeja Kosova i Metohije”, Prishtina, 1956.

<sup>16</sup> Raporte pune (2000-2014), Muzeu i Kosovës, Prishtinë.

Museum of Criminalistics at the Faculty of Law of Pristina.	1.000	1	Education	1969
Archaeological Museum of Prizren region	700	1	Archaeological	1974
Ethnological Museum of Peja	1.000	1	Ethnological	1977
Museum of Electroeconomics of Kosovo	500	5	Engineeric	1979
“Haxhi Zeka” complex in Peja	detroyed	1	Historical	1980
Institute and Prishtina Regional Museum	900	1	general	1981
Regional muesum of Skenderaj	583	1	general	1983
<b>Total</b>	<b>77.568</b>	<b>18</b>	<b>Various</b>	<b>1949-1983</b>

Fig. 3 Table with some of the Museum units established in Kosovo between 1949-1999

## 1.2. Establishment of Museums and collections in Kosovo, after 1999 until today

Due to the heavy historical past of Kosovo, having been occupied for centuries by various occupiers of the time, the Albanian people never had the opportunity to develop normally the course of the national cause, including the aims of developing the museum field. The development and dissemination of the museum system in Kosovo became possible only after its liberation in 1999. In the case of the independence of Kosovo as an independent and sovereign state, new suitable conditions and circumstances were created for the full development of social and political life in Kosovo. In the museum field, interest and investment became a concern of central and local government institutions. In this context, a number of different museums were founded, but with particular emphasis on those of historical character. In smaller size were also formed and restored museums and public and private collections of archaeological, ethnological, natural, traffic and art character, which for years collected and promoted valuable treasures of high cultural, historical and natural heritage value of Kosovo. This successful growth of the network of museums in the country was not a coincidence, but an institutional need, which was inspired by its situation of the new state of Kosovo experienced in the years after independence. The Serbian-Yugoslav intervention in the values of the cultural heritage, the consequences of the time conquered, left strong traces in the historical memory of the Albanian people. The great historical events and the qualitative changes in the life of Kosovo created conditions conducive to Albanian intelligence, personalities from the political, scientific, cultural and martial arts fields, which greatly influenced the correct orientation of this new reality. *"After the liberation many initiatives were made by institutions and professionals in the field of museology, who willingly and persistently managed to create museum institutions, through which all the substance of the material and spiritual heritage from our historical past would be reorganized and put into operation.."*<sup>17</sup>

<sup>17</sup> Pyetësor për hulumtimin dhe grumbullimin e të dhënave mbi muzetë e Kosovës [2010-2015]

Working in the museum field during the post-liberation period changed the situation in the museum network and the administration of collections, creating a completely different picture in the beginnings of real reflection and without the political dictate of the cultural and spiritual values of the Albanian people. In this study treatment, the work started on the establishment of museums after the liberation of Kosovo, on the evidence, preservation and preservation of the values of this historic period. Although in difficult situations of military-police repression, the people within themselves preserved all that had to do with the liberation war, as well as the fighting formations from which the war heroes and martyrs of Kosovo came out. This reflection in the consciousness of the people, for the fanatic preservation of ethnocultural and museum values, is regarded as a phenomenon - the flow of time, due to the consequences of heavy situation on the level of consequences passed under ex Yugoslav regime. The strong patriotic feeling, based on history, acted on the masses of the people and guaranteed the museum completion of many such objects that were opened in Kosovo after the liberation.

Not only the buildings approved by the local and central government, but in the territory of Kosovo are dozens of museums dedicated to the members of the liberation war, supplemented with materials of museum value, which today are carefully preserved and turned into centers of education of generations. The museums and collections in Kosovo that were established and developed their professional activity after 1999 are as follows: Municipal Museum of Burim (Istog),<sup>18</sup> Memorial Complex “ADEM JASHARI”, in Prekaz,<sup>19</sup> City Museum of Deçan,<sup>20</sup> Regional Museum in Fushë - Kosova,<sup>21</sup> Ethnological Museum in Isniq village, City Museum of Shtime, Isa Boletini Tower Complex in Boletin, State Collections in Kosovo and Private Collections in Kosovo.<sup>22</sup>

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<sup>18</sup> Enver Boletini, përgjegjës dhe bashkëpunëtor profesional i Muzeut Komunal të Burimit, të dhënat i dha më 20. 12. 2012, Burim.

<sup>19</sup> Shaban Hoxha, inxhinier i makinerisë - drejtor i Fondacionit të Kompleksit Përkujtimor “Adem Jashari” në Prekaz, të dhënat i dha më 18. 01. 2012, Prekaz.

<sup>20</sup> Avdyl Dautaj, përgjegjës dhe bashkëpunëtor profesional në Muzeun e Komunes së Deçanit, të dhënat i dha më 21. 12. 2012, Deçan.

<sup>21</sup> Shaban Ademi, përgjegjës (koordinator) i Muzeut Komunal të Fushë - Kosovës dhe specialist këshilltar profesional në këtë muze, të dhënat i dha më 10. 01. 2012, Fushë Kosovë.

<sup>22</sup> Raport pune, Hulimtime kërkimore në terren rreth realizimit të projektit me titull: “Ndërtimi i databazës me të dhënat e Muzeve të Kosovës”, Tetor 2012, Sektori i Historisë në Muzeun e Kosovës, Prishtinë.



Fig. 4 view of some of the collections in Kosovo

<b>Museums and collections established in kosovo after 1999 until today</b>	<b>Number of collections</b>	<b>Number of Museums per units</b>	<b>Their profile (Typology)</b>	<b>Year of establishment</b>
Municipal Museum of Burim	450	1	General	1999
Memorial Complex “Adem Jashari”	1.000	1	Historical	2000
Museum of city of Deçan	430	1	General	2001
Municipal Museum in Fushë-Kosova	250	1	General	2003
Ethnological Museum in Isniq village	600	1	Ethnological	2003
City Museum of Shtime	700	1	Historical	2004
Complex of Isa Boletini in Boletin	1000	1	Historical	2009
Founded collections of Theranda	250	1	Archaeological	2004
Gjilan city museum collections	400	1	Archaeology - Ethnology	2005

Private collections	5000	1	History- Archaeology - Ethnology	2000-2015
<b>Total</b>	<b>10080</b>	<b>12</b>	<b>various</b>	<b>1999-2015</b>

Fig. 5 Table with data on the establishment of museum units from 1999 until today

No.	Kosovo Museums	Trajtimi shkencorë profesional i koleksioneve	Presentations Promotions of the collections	Procesi i restaurimit dhe konservimit	Inventory process	Existing conditions of the collections
1	M.K.Kosovës	80%	30%	50%	70%	good (3)
2	M.Gjakovës	70%	80%	40%	90%	good (3)
3	M.Mitrovicës	75%	80%	60%	95%	Very good (4)
4	M.Trepçës	90%	90%	90%	95%	excellent
5	LSH.Prizren	90%	90%	60%	90%	good (3)
6	M.A.Prizren	60%	60%	70%	90%	good (3)
7	M. E. Pejë	90%	95%	80%	100%	Very good (4)
8	M.El.Prizren	65%	70%	60%	95%	good (3)
9	M. HZ. Pejë	05%	01%	05%	05%	sufficient
10	M. Prishtinë	50%	30%	40%	90%	good (3)
11	M.Skenderaj	60%	50%	20%	90%	sufficient
12	M. Burim	70%	80%	60%	95%	good (3)
13	M. AJ.Prekaz	70%	30%	15%	10%	bad
14	M. Deçan	30%	40%	10%	70%	bad
15	M. F.Kosovë	60%	50%	10%	80%	bad
16	M. E. Isniq	40%	60%	15%	90%	good (3)
17	M.H.Boletin	55%	10%	15%	70%	good (3)
18	M. Shtimje	60%	60%	20%	90%	good (3)

<b>19</b>	M. Rahovec	15%	05%	05%	40%	bad
<b>20</b>	M.Malishevë	09%	03%	03	305	bad
<b>Total</b>	<b>average:</b>	<b>60%</b>	<b>55%</b>	<b>35%</b>	<b>80%</b>	<b>good (3)</b>

Fig. 6 A table reflecting the general state of collections in Kosovo museums

## Conclusions and recommendations

Based on the elaboration of the work on the history of museum heritage in Kosovo, we come to the conclusion that museum activity in Kosovo could not normally develop from the earliest historical periods until after the Second World War. This situation was created due to the violent invasions by different occupiers who ruled our country for centuries. The cultural heritage in general and the museum in particular, not only has not been preserved and developed by the violent powers of that time, but rather it has been placed at the crossroads of time being damaged, appropriated, looted, isolated, burned and destroyed in mass overwhelmed by foreign barbarism. However, the invaders never succeeded in destroying all the cultural and historical values of the Albanian people, because they were and are numerous as long as the Albanian nation exists. But it should be noted that of all the riches of the national cultural treasure, few remain preserved and systematized according to the stages of historical development of the people of Kosovo. Rare species, relics of artistic, ethnographic creations of historical events from language, customs and generally from the treasures of national and cultural treasure were preserved in rich families with power and religious objects that enjoyed an authority over the invaders and wrongdoers as they were considered the gods' houses. This happened with Christian, Orthodox churches, and later with mosques, shrines, temples, madrasas and other religious sites. And since the century. XVIII and later the museum heritage was also preserved in state objects such as archives, libraries, museums, etc. We highlight here the post-World War II period of 1970-1990 and especially the post-Kosovo war of 1999 and beyond, where Kosovar museology has undergone a slight development.

## Recommendations

- Legislation in Kosovo and relevant regulations must be rebuilt in accordance with the new strategy needed, in line with international conventions and interoperable institutional parallel laws, in line with a new philosophy in museum conception, on the museum network, categorization of collections, research works in various fields, in the function of education, entertainment, communication, institutional collaboration, public relations, visitor experience, financial support concepts etc.
- Undertake emergency measures for capacity building in the conservation and restoration sector. To avoid problems related to these issues it is necessary to purchase a laboratory for conservation of exhibits. Also, to ensure the longevity of museum collections, preventive intervention of a variety of factors that affect their physical



stabilization is needed, among them; lighting, air conditioning, ventilation and fire safety.

- Promoting the museum heritage by prioritizing the establishment of a permanent exhibition which will be reconstructed in the premises of the National Museum of Kosovo.
- Qualification of staff with international best practices, through study visits, must be adapted to the new structure for a coherent image of the museum system, setting modern requirements and standards according to best experiences and practices. The museum is not only a place of repository for relics, but a place of scientific contribution to the service of society. It promotes, stimulates, and transmits clear messages on culture multidisciplinary history and tradition generation after generation for years and centuries.

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## MEDIEVAL ARCHAEOLOGICAL EVIDENCE IN KOSOVO ON ALBANIAN AND IBERIAN RELATIONS

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### Abstract

This paper presents a new attempt in the field of research on Kosovo's possible relations with the Iberian Peninsula in the medieval period, based on the archaeolinguistic facts. In order to prove these relations, a few micro toponyms have been used, which are the indicators to detect specific archaeological sites in a space that includes the territory of Kosovo. The emphasis is placed on the etymological analysis of the forms of different micro toponyms among which the foremost Albanian 'Gjytet', 'Qudat', 'Kiudats' that resemble 'Ciudad' in Iberian. The aspects of the historical linguistic and cultural heritage, in relation to these former settlements are compared and analyzed. The type of the site concerned, is fortified, and the location is on relatively high hills. Settlements are multi-layered, not inhabited continuously, but successively, which means culturally diverse and developed in different periods. The earliest period can get to the eneolithic, but rare. More representative periods are centuries XI-IX B.C., often Late Antiquity IV-VI A.D. and the Middle Ages. Life there ceases with the establishment of the Ottoman rule, but the remembrance of the locals for these settlements, has been preserved for generations in older expressions, that are not commonly used anymore, especially in Albanian. From the results of the study can be concluded that the micro toponyms are linked with the abandoning of the fortified localities in the medieval period. This is mostly evidenced, by comparing the Albanian language, which has particular links, to the corresponding toponyms and designations of the Iberian or New Latin background languages. Further researches and even more complex studies are needed to detail knowledge about Kosovo-Iberian historical and cultural relations.

**Keywords:** Archeology, Linguistic, Microtoponymes, Middle Ages, Kosovo, Iberian Peninsula, Relations

### Introduction

Kosovo is in a geographical position with favorable climates and lands for livelihoods and traffic routes linking the central Balkans with the Adriatic coast and consequently with other areas to the east and west.

Throughout the history, this fact has been as an important factor in the erosion of numerous traces of cultures and civilizations, within this country.



### **Kosova within the Mediterranean basin, adopted map**

Source: <https://www.freeworldmaps/europe/mediterranean/physical.html>

Interesting evidence that serves as an important indicator for recognizing the historical and cultural links of Kosovo to different parts of the Mediterranean basin, in light of the linguistic similarity explained by micro-toponyms of a particular type of archaeological site, located in its territory.

These localities are remnants of former fortifications, which have been preserved in old denominations of exclusively Albanian-speaking people.

This study will attempt to explore and present available evidence to the following critical themes;

- How the concerned micro-toponyms have been preserved;
- What is their relation to the language of the local population that named it and
- Relation to the other languages with which they resemble

### **Archeolinguistic evidence**

The names of the settlements in question are preserved in old forms at least since the Middle Ages and only new forms are used in everyday language.

In the localities of the fortifications' ruins there is no evidence of continuity of habitation but there is a resettlement from the earliest to the medieval times. Designations based on etymology and preserved forms belong to certain medieval periods. In a few cases, these archaeological sites are near urban modern centers.

The designations can be assumed to have come first, from residents who preserved the words of the time (ascertaining consistency that they were part of those settlements) and secondly, based on walls preserved, until the medieval period (due to the preservation of the micro-toponyms) in the language of the population.

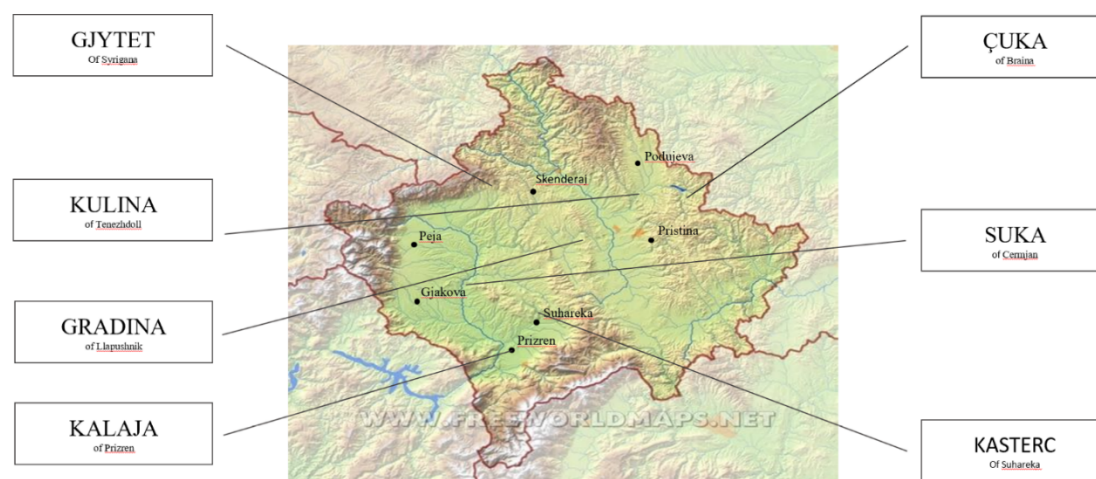
The walls have been demolished at their heaviest part in modern times for the use of raw stone for construction purposes, being treated as a not-so-precious heritage among locals.

The existence of over forty ruins of fortifications in the territory of Kosovo known until the 80s of the last century, does not change significantly as a number today. On the basis of very limited historical sources, some of them are known from the 12<sup>th</sup> and 14<sup>th</sup> centuries, and according to archaeological findings as well in 10<sup>th</sup> century<sup>1</sup>.

The last two decades of archaeological research have yielded new results that may relate to the fortifications recognized by the list of the byzantine scholar Procopius of Caesarea for the IV-VI centuries of the Late Antiquity and the medieval period in general.

Different denominations of a same settlement type may be included under a common toponymic nomenclature as ‘castelnymes’ as the standard reference for micro-toponyms which in most cases are oronyms: "castra" (Latin "castrum: castel" + Greek "onoma: name").

Such castelnymes in Kosovo come in the following forms: "Gjytet", "Kasterc", "Gradina", "Suka", "Çuka", "Kulina", "Kalaja". They each have semantic correspondence with a particular language e.g. Latin, Neolatine, Arabic and Slavic, which will be discussed below.



Microtoponymes of ruined fortifications in Kosova

[Freeworldmaps.com/europe/Kosovo/https://www.freeworldmaps.net/europe/kosovo/map.html](https://www.freeworldmaps.net/europe/Kosovo/)

1. "Gjytet" is encountered as micro-toponyms in favorable forms also in Albania: 'Chudat' (ward), "Kiudats Castle" (the castle of town)<sup>2</sup>. This word in the new Albanian form is used "Qytet" and has the closest phonetic and morphological links to the Iberian word "Ciudad" originating from Latin "Civitatem.". The proximity of the Albanian word 'qytet'(city) to the hispanik word 'ciudad' is well known<sup>3</sup>.

<sup>1</sup> Relja Novaković, "Oko problema proučavanja gradina na Kosovu." *Buletini i Muzeut të Kosovës*, no. XIII-XIV (1984): 99.

<sup>2</sup> Kolec Topalli. *Fjalori etimologjik i gjuhës shqipe* (Tiranë: Qendra e studimeve albanologjike, 2017), 1231-32.

<sup>3</sup> Noel Malcolm, *Kosova një histori e shkurtër*, Second edition. Trans.: Abdullah Karjagdiu (Prishtinë/Tiranë: Shtëpia e librit, 2001).

2. "Kasterc" is also known in other local forms as 'Kosterc', 'Kosterch', where the suffix c / ch gives a denominative meaning. This form resembles between new latin languages as 'Castel', 'Castello' and Latin 'Castra'<sup>4</sup>.

3. "Gradine" is a castelnym of Slavic origin that is used in some places also as 'Gradishte', 'Gradishë', etc., derived from the root 'Grad'(City).

In the context of the locality there are cases where other affiliate micro-toponyms are preserved such as "Burgu i Gradinës"<sup>5</sup> (in Albanian), meaning "Prison of Gradina".

The word 'Burg' comes from German in the sense of 'castle, town', which is similar to English and other medieval European languages with the same meaning<sup>6</sup>. It is also known in Latin as Burgus "small town, castle, suburb" and is preserved in Albanian knowing that in the Middle Ages prisons were inside castles.<sup>7</sup>

4. "Kuline" goes with the Latin Kuline which means "Kitchen", which it implies apparently that the surrounding people have been supplied, or the food has been prepared within the fort at a given time.

5. "Çuka"(pronounced 'chuca') as the name has widespread worldwide. It can be compared to different languages that have differences in meaning but are not out of context. Etymologically it also has onomatopoeic character in certain cases, eg: bird in Albanian (meaning bird peck but also used for mountain pecker which has similarities to English in naming bird compost woodpecker /wood + pecker: in Albanian Qukapik/quka+pik).

In the Chicksaw and Choctaw (Native American) language, Chuka means: House, home, building. This pattern is also found in other Balkan countries such as Bulgaria with orlova chuka cave localities, ect. Close to this form stands the "suke", form which also features crystalline designation for these localities, but this word should be treated separately because it is micro- toponym in itself. Facing toponymy Chuka on the African continent as a city in Kenya, as well as Busia, similar to a village near Pristina, while Kosovo and Gusia provinces in our region resemble the



'Gjytet of Surigana'

Source: Harta arkeologjike e Kosovës II

<sup>4</sup>Wiktionary "Castra" accessed March 30, 2020/<https://en.wiktionary.org/wiki/castra>

<sup>5</sup> Adem Bunguri, Luan Koçbashliu, Masar Valla, "Komuna e Drenasit(Gllogocit)", *Harta Arkeologjike e Kosovës, Vëllimi II* (Prishtinë: Ministria e Kulturës, Rinisë dhe Sportit, 2012), 127.

<sup>6</sup>Wiktionary "Burg" accessed 18 March, 2020/  
<https://en.wiktionary.org/w/index.php?title=burg&oldid=58738256>

<sup>7</sup>Topalli, *Fjalori etimologjik i gjuhës shqipe*, 273-274.

name of the Gusii population otherwise called Kosova<sup>8</sup>. Whether these facts may be coincidence, there remains to be specific scientific research.

6. "Suka" means Semitic, respectively Arabic 'Suuk': English 'Bazaar' and Hebrew 'Sukkah' ('temporary dwelling', 'booth').

7. "Kalaja" also comes from Arabic 'Kal'a' but it is more possible that this word has entered Albanian and the Balkan languages through Ottomans. The forts during the Ottomans served as an architecture related to the military system in the vicinity of certain cities.

In the Albanian vocabulary the names of fortifications that are used only as micro-toponyms are "Gjytet", "Gradine, Gradishte, Gradishë", "Kasterc, Kosterc / ç", Sukë, Çukë, while "Kala" and "Kështjellë" are part of a spoken language. The meanings that emerge from these micro-toponyms are the city, the castle, the market, the house, the kitchen, the prison. All these denominations are part of the ruins of the former fortifications.



'Gradina of Lapushnik'

Source: Harta arkeologjike e Kosoves II

Indications of the inhabitant connection with these fortifications are the comparisons through the historical linguistics of certain words of certain languages with the architectural elements, respectively the designations in the field of construction, which are part of the linguistic fund used in today's Albanian eg. 'mur' (the wall) from old Occitan "mur", which has penetrated various European languages from the Latin murus<sup>9</sup>.

The history of regular wall type fortifications relates to the economic and military powers throughout history. Their character has been defensive against both external and internal attacks as a result of rivalries for supremacy and social differentiation. Throughout history, the means and forms have changed but the function and purpose of fortifications remained indicator of a specific cultural character as just one of the features of history in human society.



'Suka of Cermjan'

Source: Harta arkeologjike e Kosoves I

<sup>8</sup>Encyclopædia Britannica, inc. **Access Date:** March 28, 2020, <https://www.britannica.com/topic/Gusii>: "Gusii, also called **Kisii** or **Kosova**, a Bantu-speaking people who inhabit hills of western **Kenya** in an area between **Lake Victoria** and the Tanzanian border"; Wikipedia, [https://en.wikipedia.org/wiki/Busia,\\_Kenya](https://en.wikipedia.org/wiki/Busia,_Kenya) and [https://en.wikipedia.org/wiki/Chuka,\\_Kenya](https://en.wikipedia.org/wiki/Chuka,_Kenya)

<sup>9</sup> Wiktionary "Mur" accessed March 18, 2020/ <https://en.wiktionary.org/wiki/mur>. Diccionari de la llengua catalane, segona edicio, Institut d'Estudis Catalans.

## Chronology

The period of their appearance in Kosovo has been largely known since XI-IX B.C. and it is related to the Phoenician expansion towards the western Mediterranean.

The fortifications, however, continued in various periods, more specifically during the:

- Hellenistic period of IV-II B.C.;
- the period of "barbaric" invasions during 2<sup>nd</sup>-3<sup>rd</sup> century and late antiquity 4<sup>th</sup> -6<sup>th</sup> century;
- the time of medieval templar movement and crusader campaigns in the 11<sup>th</sup> -13<sup>th</sup> century;
- the existence of small feudal domination and states in medieval Balkan until 15<sup>th</sup> century;
- the presence of Byzantine empire up to 14<sup>th</sup> -15<sup>th</sup> century;
- Ottoman period from 15<sup>th</sup> until 20<sup>th</sup> century.

These diverse fortifications, however, do not, generally, differ from the chronology of appearance of fortifications in the region<sup>10</sup>.

Earlier cultural layers from the Eneolithic period may also be encountered in some of those locations, except in rare cases also, earlier, in the Neolithic period, as a result of the appropriate geographical position in low altitude avoidance sites of the accumulation of waters nearby and in other cases in by the avoidance of physical danger due to the finding of palisade traces in certain areas within a protected natural position.

Similar simple fortifications are also known in modern military land camps with earthen rampart associated with palisade of metal barbed wire.

Being favorable living positions, with water and fertile land close and strategic in terms of convenient links for fast and easy traffic, surveillance, defending and assault, these locations have been consistently selected for settlement, which presupposes a similar social, economic and cultural character with variations.

Only in the Neolithic, Roman and Ottoman periods did the settlements lie flat. In the first case, because of simple organizational cultures freed from internal social pressure and non-external pressure as a result of abundant spaces; the second due to the politico-military domination under strict measures of the slave and colonial system and the third due to the coexistence of a multiculturalist society with the support of the rule of law that provided for the protection of the freedoms and rights of different ethnic and religious communities.

The history of fortifications does not belong to the past. In 2019, the most powerful fortification ever built in Kosovo was inaugurated in Pristina<sup>11</sup>.

## Ethno-linguistic relations

Relevant languages that identify the meanings of castelnymes also correspond to languages that explain the meanings of the names of Albanian tribes. Tribal nomenclature does not anyway mean ethnogenetic origin but rather the origin of the language from which it is named.

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<sup>10</sup>Gjerak Karaiskaj, *5000 vjet fortifikime në Shqipëri* (Tiranë: Shtëpia botuese "8 Nëntori", 1981): 6-8.

<sup>11</sup> The Embassy of United States of America in Pristina.



This fact expresses the possibility of contacts with other ethnic communities causing language interventions, constituting cultural layers in terms of coexistence and possible ethnic agglomerations as a part of a society at certain time periods. Further research is needed to find out how these language infiltrations came about and what they have to do with genuine ethnicity.

The names of peoples and tribes usually come from others, so the first documentary data are from the written sources by foreign authors about the time when the present ethnic Albanian and of the tribes name are mentioned.

To date, it is not certain when the Albanian tribes in the Balkans, began to function in terms of community and territorial organization, the Ottoman period being an exception, although the surnames of persons corresponding to tribal names have been known since 13<sup>th</sup> and 14<sup>th</sup> century. Previously, the organization of Albanians is recognized in historical terms in the context of particular feudal families.

Different foreign travelers that have described the Albanian tribes during the nineteenth and early twentieth centuries concentrated in the area of present-day Albania, Montenegro, and Kosovo have provided information that do not change much in character provided by modern foreign scholars.

Other ethnic groups are also part of the Albanian tribe, especially from the Slavic communities and other minorities living in Kosovo. In addition, the Albanian tribal designation is used as a patronymic in the Balkan region and wider to European peoples.

The languages that explain the etymology of the castelnymes coincide with the languages that explain the etymology of the names of the Albanian tribes that extend to Kosovo and different areas of Albania and region. This is not considered ethnic origin but only linguistic links and this study will highlight only the names of some of the tribes that linguistically belong to the castels treated in this paper in the context of population relations with the history of these former fortifications.

Albanian tribe names are of different linguistic origins if compared according to morphological, phonetic and semantic criteria with certain language branches such as: with New Latine languages: Kastrati from Latinian:Castra"castel"; Kelmendi similar to personal name 'Clement' from old french<sup>12</sup>; 'Shala' from French 'Selle' (saddle) -selo (slavic 'village') -settle 'place' from Latin sella<sup>13</sup> Latin / Arabic: Morina Latinized from greek 'maur' for moor<sup>14</sup>; 'Gashi' from Arabic (cover)<sup>15</sup> which according to one version relates to medieval feudal family in Albania Spani<sup>16</sup>, similar to ' Spain 'though with uncertain etymology; "Krasniqi" from Slavic 'Krasni' (Beautiful) and Anglo-Saxon Berisha: Bearish and Thaçi: Thatch.

Albanian relations with Iberian languages are interlinked through the languages used in the Mediterranean basin under certain circumstances of common history reflected by the names of

<sup>12</sup> Wiktionary "Clement", accessed March 30, 2020 <https://en.wiktionary.org/wiki/clement>

<sup>13</sup> Wiktionary "Selle", accessed March 28, 2020. <https://en.wiktionary.org/wiki/selle>

<sup>14</sup> Wiktionary "Moor", accessed March 28, 2020. <https://en.wiktionary.org/wiki/moor>

<sup>15</sup> Rohi Ba' Albaki, *AL-MAWRID: A MODERN ARABIC-ENGLISH DICTIONARY*. Seventh edition (Beirut, Lebanon, 1995), 800. <https://epdf.pub/queue/al-mawrid-a-modern-arabic-english-dictionary.html>

<sup>16</sup> Robert Elsie, *The Tribes of Albania: History, Society and Culture* (Bloomsbury Academic, 2015), 169. [https://en.wikipedia.org/wiki/Gashi\\_\(tribe\)#CITEREFElsie2015](https://en.wikipedia.org/wiki/Gashi_(tribe)#CITEREFElsie2015).

medieval Albanian feudal families among which we can mention Muzaka whose etymology probably flows from arabic "el musaka" (irrigation contract)<sup>17</sup> or borrowed from Arabic (musaqqa 'a, "chilled") to Greek musakas (mousakás), to Turkish musakka, to Spanish musaca, etc,<sup>18</sup> and Zaharia (known as name also in Spain) from semitic personal name to Greek Ζαχαρίας (Zacharias)<sup>19</sup>.

During the Middle Ages, European and Semitic language interventions occurred not only in Albanian but also in Slavic languages.

The reasons for this diverse linguistic overview in such a small territory are related to the global movements of medieval economic-military and religious character in the context of European inward relations and in relation to inter-Mediterranean peoples and cultures. The main linguistic influences are Latin, New Latine, Arabic (also ancient Semitic) and Slavic without excluding ancient Greek and Byzantine influences.

In the XV century, in the Iberian peninsula, native Muslim populations of different ethnic communities as well as members of non-Christian religions were eliminated and persecuted in various forms such as deportation, migration, assimilation, so that the Ottoman Emperor Sultan Bayezit II (r.1481- 1512) at that time housed a considerable number of them within the empire to protect them<sup>20</sup>, where today's Albanian lands were included as a part of that empire.

The Muwellidune populations, otherwise known as the young Europeans of that time, will have left a legacy in the European lands of the Ottoman Empire. Also the expeditions of discovering new lands by Spain and Portugal constitute another possibility of spreading certain influence over the Western Balkans through the Adriatic coast and the Mediterranean<sup>21</sup>.

The period, from the 11<sup>th</sup> to the 15<sup>th</sup> century, characterized by historical developments such as the so-called Middle East Crusade campaign, the existence of Balkan states, the continuing influence of the Byzantines, relations to European centers before and after the so called "Spanish Reconquista" on the Iberian Peninsula and the cultural and historical developments of the native population within the Ottoman Empire, constitutes an important basis that could serve to explain the nature of the shifting connections between ruined castles and the historic inhabitants associated to.

## Conclusion

This paper attempted to highlight Kosovo's archaeolinguistic evidence in medieval period by focusing how certain micro-toponyms have been preserved, their relation to the language of the local population that named it and relation to the other languages with which they resemble.

Contacts may be caused by different factors as: trade, military, cultural, migration, etc., especially during Middle Ages.

<sup>17</sup> Sejid Sabik, *Fikhus-sunneh*, Vëllimi III (Tiranë: Instituti i Mendimit dhe Qytetërimet Islam/Mileniumi i Ri, 2008): 263.

<sup>18</sup> Wiktionary "Moussaka" accessed March 27, 2020 <https://en.wiktionary.org/wiki/Moussaka>

<sup>19</sup> Wiktionary "Zacharias", accessed March 26, 2020 <https://en.wiktionary.org/wiki/Zacharias>

<sup>20</sup> Wikipedia "Bayezid II", accessed March 28, 2020. [https://en.wikipedia.org/wiki/Bayezid\\_II](https://en.wikipedia.org/wiki/Bayezid_II)

<sup>21</sup> Wikipedia "Muladi", accessed March 28, 2020. <https://en.wikipedia.org/wiki/Muladi>

The study presented numerous examples that relate to the theme concerned, and also offers a distinct analysis on the Kosovo's fortifications' domain, all of which in the light of comparative view, with those in region. The extension of powerful cultures – “globalization” of a given time, played important role on stratified cultural heritage and linguistic borrowings from antiquity to the late periods of history.

After all, Kosovo and entire Balkan territories throughout history are influenced by different ethnocultures which may be consider part of the common European cultural and historical heritage.

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## COMPLY OR EXPLAIN THE PRINCIPLES OF THE CORPORATE GOVERNANCE CODE. THE CASE OF PHARMACEUTICAL LISTED ENTITIES FROM ROMANIA

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### Abstract

Starting from the assumption that corporate governance is a set of “rules of the game” by which companies are managed and supervised in order to protect the interests of all stakeholders, to increase the level of transparency and competitiveness on the market, in this paper we aim to assess the compliance of the listed entities in the pharmaceutical field with the principles of corporate governance issued by the Bucharest Stock Exchange (BSE). In order to achieve the research objective, we analysed both the Annual Reports and the Comply or Explain Declarations developed in the period 2015-2018 by the entities in the pharmaceutical field listed on the BSE and we used a scoring system to measure their degree of compliance with the provisions of the Governance Code in relation to the aspects regarding the responsibilities of the Board of Directors or of the Supervisory Board / Directorate in the dualistic system, the risk management and internal control system, the fair reward and motivation of the members of these boards and the value added through the relationship with the current and potential investors. The results of the research carried out reflect a high degree of compliance of the listed entities in the pharmaceutical field in Romania with the provisions of the Corporate Governance Code, but this high compliance is not correlated with performance measured through Return on Assets (ROA) and Return on Equity (ROE) indicators.

**Key words:** corporate governance, compliance, principles, provisions, stakeholders

### Introduction

Our current reality reveals that, in order to ensure sustainability, companies not only have to seek to maximize the profit, but they also have to take into account the interests of the stakeholders and the involvement in the life of the community where they operate.

The literature includes many studies concerning, on the one hand, the impact of the corporate governance attributes such as: the CEO duality, the board size, the number of non-executive directors, the company’s size, the type of audit opinion on the performance measured most often by ROA, ROE and Tobin’s Q indicators. On the other hand, there are studies that try to determine if there is a relationship between the compliance with the principles and provisions of the Governance Code and the companies’ performance. The studies undertaken in this field take into account the information published by the entities listed on different stock exchanges of the world, and the results of researchers are not consistent, which reveals that debates on this topic are open and of current interest, especially in the present-day context where a new financial crisis that may affect economies globally is looming.

This paper *reflects the level of compliance* of the pharmaceutical entities listed on the Bucharest Stock Exchange (BSE) *with the principles and provisions of the Corporate*

*Governance Code* and determines the relationship established between the Corporate Governance Score (CGS), determined by a scoring system and the performance measured by Return on Assets (ROA) and Return on equity (ROE) indicators. The source of the data included in the study is the information published by entities both in the Annual and the Sustainability Reports over the period 2015-2018.

The study is structured into 4 sections. The first section provides the literature review. Section 2 presents the methodology, sample data and research hypotheses. Section 3 highlights the empirical results while last section concludes by providing research limitations and avenues for future analysis.

### Literature review

Due to globalization, the relationships between the economic entities, the exchanges and the commercial reports have registered a strong intensification that goes beyond the national borders. Most of the economic transactions occurring at an international level are carried out by corporations expanding their businesses, and their role within the company is particularly important given the development of markets for goods and capital. However, the presence of multinational corporations on various markets also implies a greater focus on the way these entities are managed and supervised. In the current economic context, in order to ensure a sustainable development of the entity, the management of multinational corporations must take into account both the interests of the shareholders and the stakeholders, but at the same time protect the environment and the community where they operate.

Given the OECD definition (2015), “Good corporate governance is not an end in itself. It is a means to support economic efficiency, sustainable growth and financial stability. It facilitates companies’ access to capital for long-term investment and helps ensure that shareholders and other stakeholders who contribute to the success of the corporation are treated fairly”. Corporate governance is defined as “a set of relationships between a company’s management, its board, its shareholders and other stakeholders”, also providing “the structure through which the objectives are set, as well as the means of attaining those objectives and monitoring performance are determined”. The first widely used definition of corporate governance seems to belong to Cadbury (1992) and refers to “the set of rules by which companies are directed and controlled”.

Starting from the definition of the concept, we can identify the most important benefits that corporate governance can bring to the entities adopting effectively such a system of administration and control:

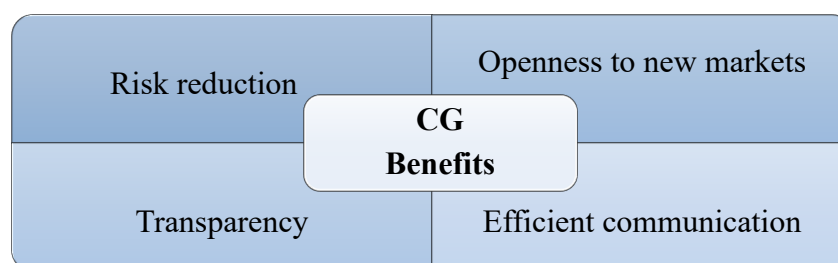


Figure 1. Corporate Governance Benefits

Source: authors own elaboration

In 2015, the Bucharest Stock Exchange has issued a new Corporate Governance Code, namely a set of principles and recommendations for companies whose shares are accepted for trading on the regulated market in order to create an internationally attractive capital market in Romania, based on best practices, transparency and trust. It is structured in 4 sections:

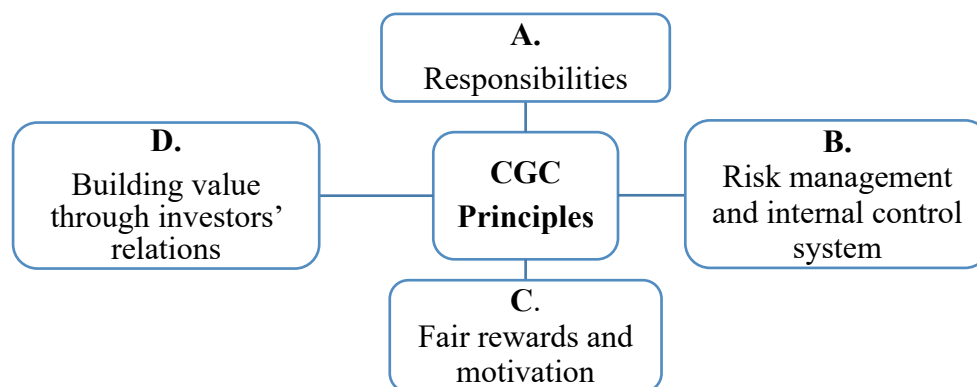


Figure 2. Corporate Governance Principles and provisions issued by the BSE

Source: authors own elaboration

The relationship established between the efficiency of the system by which entities are directed and controlled and their performance is a topic of great interest, being debated since 1979 by researchers such as Thonet and Poensgen.

The topic of this study is of present interest, because, in the current economic context, both shareholders and other stakeholders are interested in ensuring the long-lasting and sustainable development of the business. Thus, many researchers attempted in their studies to determine the impact of the corporate governance attributes on the financial performance measured by indicators such as Return on assets (ROA), Return on equity (ROE), Market capitalization or Tobin's Q.

However, the results of the studies are not consistent, highlighting both the existence of a relationship between the corporate governance attributes and the companies' performance and also the absence of such a connection. Thus, there are studies demonstrating the existence of a strong relationship between the two variables, such as those performed by Caspar Rose (2016), who investigates whether there is a relationship between a high degree of adherence to the Danish Code of Corporate Governance and the financial performance. The result of his research reveals that there is a positive relationship between the ROA/ROE and the Corporate Governance Score, calculated based on the information published in the Comply or Explain statement. Achim (2016) also identifies a relationship between the Corporate Governance Score of the companies listed on the BSE and the ROA, but his research does not reflect a statistically significant relationship in order to confirm the existence of a relationship between the governance score and the performance measured by the ROE.

Other studies that don't highlight the existence of a relationship between governance attributes and performance are those performed by Udo Braendle (2019), who analyzes the correlation between the compliance with the provisions of the Austrian Governance Code and the financial performance of the entities listed on the Vienna Stock Exchange. The results of the research do not identify a relationship between a high degree of compliance and the performance measured by the ROA, the ROE and the Net profit margin (NPM).

Fulop et al. (2015), in the study undertaken on 12 entities listed on the BSE, do not identify significant correlations between the financial indicators and the indicators that measure the application of the corporate governance principles.

All these approaches reflect the importance given to this topic and are necessary for understanding the influence that different governance attributes can have on the entities' performance, being equally useful to shareholders, to stakeholders and to other persons interested in corporate governance.

### Methodology

Through this study we want to provide an answer to the following research question: Is there a correlation between high compliance to the BSE Code of Corporate Governance and financial performance of entities from the pharmaceutical field listed on the Bucharest Stock Exchange?

H<sub>0</sub>: There is no positive correlation between high compliance to the BSE Code of Corporate Governance and financial performance

H<sub>1</sub>: There is a positive correlation between high compliance to the BSE Code of Corporate Governance and financial performance

The answer to the research question stated above depends on the validation of one of the two research hypotheses. Thus, the result of the econometric model indicates that hypothesis H<sub>0</sub> cannot be rejected, which reflects in return the invalidation of hypothesis H<sub>1</sub>, in the opposite situation, the validation of hypothesis H<sub>1</sub> determines the invalidation of hypothesis H<sub>0</sub>.

The action taken to determine if there is a relationship between the level of compliance with the principles and provisions of the Corporate Governance Code and the performance of the listed entities involves completing the following steps:

- Transforming the qualitative data extracted from the information published by the entities under study in the “Comply or explain” statement into quantitative data, through the following scoring system:

Conformity mark	Significance
3	Full compliance with the principles and provisions
1	Partial compliance
0	Non-compliance

Source: authors own elaboration

- Collecting the necessary information from the Annual financial statements (Total assets, Equity and Net profit) in order to determine the value of ROA and ROE indicators used to measure the performance of the listed entities
- Testing the relationship between the CGS and the performance measured by the Return on Assets and Return on Equity indicators.

From a graphical point of view, the research model is illustrated as follows:



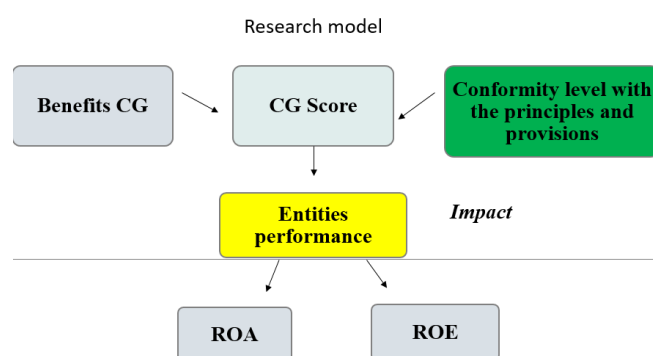


Figure 3. Research model

Source: authors own elaboration

### Results and discussions

The aim of the study undertaken is to determine the compliance of the entities in the pharmaceutical field, listed on the BSE, with the provisions and principles of the Corporate Governance Code and the impact that the degree of compliance may have on the performance measured by ROA and ROE indicators.

The analysis of the Comply or Explain statement, drafted by the entities studied over the period 2015-2018, in conjunction with the scoring system presented in the methodology, allowed calculating the Corporate Governance Score for the 6 entities in the pharmaceutical field included in the research. The results obtained, summarized in the 4 sections of the Corporate Governance Code issued by the BSE, are illustrated in the following figure:

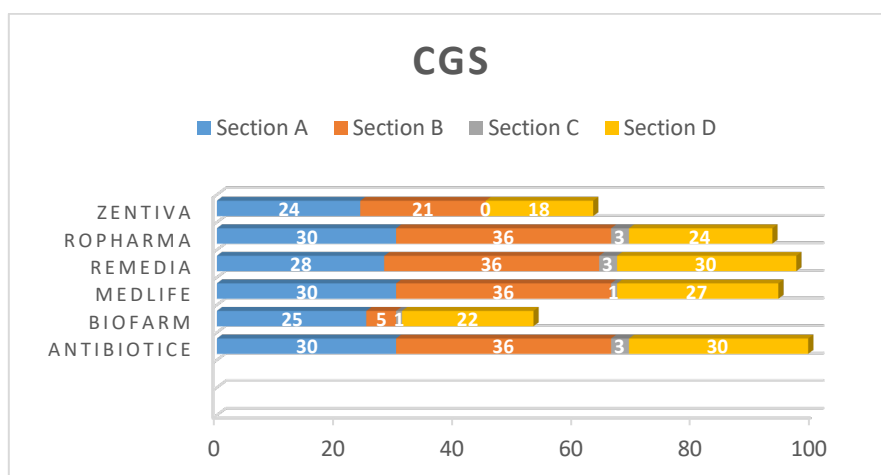


Figure 4. Corporate Governance Score

Source: authors own elaboration

The maximum value of the Corporate Governance Score that an entity can obtain from the four sections of the Code is 99 points, which reflects full compliance with the principles and provisions of the BSE Code. Total conformity, by sections, actually means obtaining the following scores: In section A, consisting of 10 provisions, the maximum score is 30 points. In section B, consisting of 12 principles, total compliance means 36 points, and in section C,

consisting of only one provision, the maximum score is 3 points. Section D, including 10 principles and provisions, means another 30 points for total compliance.

In the figure presented above we can see that only one company out of the six fully complies with the principles issued by the BSE (99 points). Three entities comply largely with the provisions, registering 93, 94 and 97 points out of the total of 99 points, and the other two entities included in the study comply partially or not at all in certain sections with the provisions and principles of the Governance Code, registering 53 and 63 points.

Based on the scoring system presented in the methodology, the Corporate Governance Index of the studied entities amounts to an overall of 499 points out of a total of 594, which, in percentage, represents an 84% compliance with the provisions of the Code issued by the BSE. These results allow us to state that the entities under study comply, to a very large extent, with the requirements issued by the Bucharest Stock Exchange.

The descriptive statistics of the results obtained based on the scores given according to the level of compliance with the provisions of the Code, is illustrated in the following table:

Table 2. Descriptive statistics

<b>Descriptive statistics</b>	<b>Section A</b>	<b>Section B</b>	<b>Section C</b>	<b>Section D</b>
Mean	27.83	28.33	1.83	25.16
Median	29	5.27	2	25.5
Standard deviation	2.71	12.90	1.32	4.75
Min	24	5	0	18
Max	30	36	3	30
Sum	167	170	11	151
Count	6	6	6	6

Source: authors own elaboration

In the table above it can be noticed that the average of the points related to Section A is 27.83 points, which reflects a 93% compliance of the entities in terms of the Responsibilities of the Board of Directors and of the Management Board. The score corresponding to section B reflects, on average, a 79% compliance with the provisions on risk management system and internal control. The analysis of the Comply or Explain statement reveals that the setting-up of the Audit Committee and the issues regarding the independence and the non-executive membership of the President are the sections where entities do not comply with the BSE requirements. The average of section C reflects a 61% compliance with the principle stating that the entity should publish on its website the remuneration policy and should include in the annual report a statement concerning the implementation of the policy during the period under review. The average of section D reflects an 84% compliance with the principles regarding the relationship the entity must build with its investors.

Table 3. Regression Statistics

Regression Statistics		
	Model 1 - ROA	Model 2 - ROE
Multiple R	0.780892	0.739766
R Square	0.609792	0.547254
Adjusted R Square	0.51224	0.434067
Standard Error	13.87277	14.94317
P-value	<b>0.0667</b>	<b>0.0927</b>
Significance F	<b>0.066753</b>	<b>0.09277</b>

Source: authors own elaboration

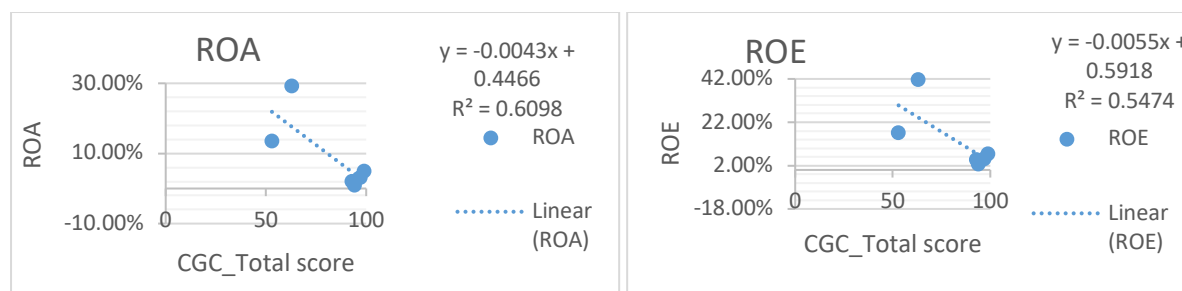


Figure 5. Correlation matrix

Source: authors own elaboration

The results obtained, presented above, allow us to state that, although the entities from the pharmaceutical field comply to a great extent with the provisions of the Corporate Governance Code issued by the BSE, between the high compliance score and the performance measured through the ROA and ROE indicators, no statistically significant correlations are established. In this case, our hypothesis  $H_0$ : There is no positive correlation between high compliance to the BSE Code of Corporate Governance and financial performance is valid. Our results are in accordance with those obtained by Fulop (2015) and Udo Braendle (2019).

## Conclusions

This study did not find a correlation between high compliance to the Romanian Code of Corporate Governance and financial performance of companies from the pharmaceutical field, listed on the Bucharest Stock Exchange.

This result has to be limited to the utilized parameters of the model, namely, the Corporate Governance Score and the performance measured by Return on Assets (ROA) and

Return on Equity (ROE). Another limitation of the study is the relatively small sample size, all entities from the pharmaceutical field listed on the BSE that registered profit in the financial years under analysis.

The validation of the hypothesis *there is no positive correlation between high compliance to the BSE Code of Corporate Governance and financial performance* shows that corporate governance is an important concept for the entities included in the study, they comply to a very large extent with the requirements, although this high degree of compliance is not correlated with performance.

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## EXPLORING THE CONTEMPORARY EUROPEAN AND INTERNATIONAL ART SCENE. THE ROLE OF GREEK VISUAL ART GROUPS AND COLLECTIVES AT THE BEGINNING OF THE 21<sup>ST</sup> CENTURY

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### Abstract

The paper examines the course of evolution of international and national art groups and collectives and highlights their contribution to the arts and culture. Art groups and collectives play a decisive role in various changes occur in the arts field and they are engaged in social and political activities. In particular, the paper focuses on Greek visual art groups and collectives. The emergence of the first art groups and collectives in Greece, already from the beginning of the 20<sup>th</sup> century, reflects the socio-political and cultural aspects of that period, whereas their course throughout time rests upon the socio-political conditions of each era, and reveals, most of the time, trends in national and international arts field. Covering the period spanning from the beginning of the 21<sup>st</sup> century till recently – especially from 2007–2008 (initiation of the global economic crisis and the subsequent collapse of Greece's economy) until 2019 – we aim to examine their goal and their mission, their artistic orientation and activities, their role in society, their contribution and impact in cultural production. The findings of the study are discussed in a broader context of international comparison with art groups and collectives from other countries. After this introduction the paper unfolds as follows. First we discuss, in brief, the concept of art groups and collectives and provide the international and national context of their emergence. Then we present the methodological framework of our research, present and analyze the data collected. The last section concludes.

**Key Words:** Art groups and collectives, Greek art groups and collectives, European and international art scene, artistic creation and cultural production, the social and political role of the arts.

### Art groups and collectives on the international and Greek scene

#### *The international arts scene*

Art groups and art collectives are two important contributors to the art world with no distinct boundaries between them. The art group is created at a specific time by artists with a shared artistic philosophy and aesthetic gaze, with the aim of either exhibiting individual works of art or, as in contemporary groups, creating a joint work. They seek to promote their work and its

impact on the cultural environment, as well as to communicate their ideas and thoughts about Art. Their goals are mainly artistic creation and, additionally, the socio-political approach of their work and its effects (Stimson & Sholette, 2007: xi,xvii).

An art collective may present all the above features of the art group, but it also possesses a stricter structure, a lack of hierarchy and a particular ideological and political character, which defines its specific radical and subversive actions.<sup>1</sup> In a collective, members get involved and co-operate in the creation of a project, which does not bear the same significance for them as it does for art groups, because the most important aspect for them is the socio-political implications which their actions generate.<sup>2</sup>

The first non-formal art groups and collectives appear in the mid-19th century, when the artist was independent of political and religious authorities. It was the era that modern art emerged, contesting and reacting against academicism, social stereotypes and political conventions (Christou, 1990: 345-346).

Significant artistic movements with a strong social profile and activities set the first foundations for future art groups and collectives due to their unconventional and radical behavior (such as Dadaism and Surrealism in the early 20th century). The intense and extreme manifestations and reactions of the artists of these art movements influenced and inspired the art groups and art collectives (Stimson & Sholette, 2007: xi,xvii).

One of the earliest and most dynamic appearances of an art group in Europe's postwar art scene was of the **CoBrA** group (1948 and 1951), named after the initials of the three cities of origin of most of the artists in the group, **C**openhagen, **B**russels and **A**msterdam. The most famous artists of the group were the Dutch Appel, Constant and Corneille, the Belgians Dotremont and Bury and the Danes Heerup and Pedersen. The basic tenet of the group was abstract painting, influenced by primitivism and the shift to violent spontaneity (Stojanovic, 2007:20-22).

The next significant group was "**internationale situationniste**" (1957-1972), led by the Frenchman Guy Debord, which was a kind of early art collective, as its members (mainly from France, Scandinavia and Italy) throughout the long life of the group focused mainly on radical actions and subversive theories, with a prolific production of publications. These actions had political implications as they challenged and condemned the dominant aesthetic and socio-economic reality of Western civilization and, moreover, Western commercialization and over-consumption (Amstrong, et al., 1991:157-158). In the interim period between **CoBrA** and **internationale situationniste** (1952-1957) a British art group laid the groundwork for pop art. It was the Independent **Group IG**, which through lectures, events and exhibitions argued that art and culture must inspire and reflect contemporary day-to-day life (e.g. technology, consumerism, popular culture). Among the artists of the group was the sculptor Eduardo Paolozzi who, along with other members, organized the first exhibitions of Pop Art "Parallel

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<sup>1</sup> Tate Art Term Collective.

<sup>2</sup> In particular: *a.* in art groups and collectives the members create their own name, vision and goal and they are not dependent on critics; *b.* art groups and collectives choose the public open space, mainly in the urban fabric of large cities, for their group exhibitions and activities, while their works are not usually housed in museums, national galleries, galleries in general, private collections and specific public spaces; *c.* members of art groups and collectives have the ability to belong to more than one group and collective; *d.* their size and duration are limited, whereas most members of the groups are from the same country and do not have much interaction with other countries; *e.* in groups and collectives, the spirit of teamwork and co-operation is dominated by collective actions and exhibitions, expressed mainly with individual work and quite often with collective work.

of Life" and "This is Tomorrow" at the Institute of Contemporary Art in London in 1953, which had a huge impact on the evolution of avant-garde art (Hopkins, 2000: 55-58).

Contemporary to this, in 1955, the "**Gutai**" group was born in Japan, founded by Jiro Yoshirama. The group organized different actions each time at each event, based on spontaneous and random gestures and incorporated elements of theater, music and dance, reinventing the philosophy of whole art. Gutai Group events were regarded as one of the earliest forms of happenings and performances of contemporary art, without however having a political character (Amstrong et al., 1991:135,136).

One of the most notable art groups, with a strong collectivist character, was "**Fluxus**", which first appeared in New York in 1961, founded by the Lithuanian artist George Maciunas and influenced by the experimental composition concepts of American musician John Cage, Dadaism and Marcel Duchamp. The actions of the group followed the logic of conceptual art, with the aim of deconstructing the dominant art scene and Western culture and society itself. The group envisioned utopian societies of equality and freedom, organizing happenings such as Yoko Ono's antiwar actions with John Lennon and Josef Beuys' installations. Groups with a strong anti-war and feminist spirit were also the collective groups "**Art Workers Coalition**" (1969-71) and "**Women Artists in Revolution**" (1970-1978), which strongly opposed institutions and large museums [such as the Museum of Modern Art (MOMA), the Museum of Contemporary Art], demanding radical changes in the operation of museums, such as establishing a day of free entry etc. (Gilbert, 2007: 78,196).

Ideas of Conceptual art were central to the group "**Art and Language**", created in 1968 in Coventry, UK, by art teachers Terry Atkinson, David Bainbridge and Harold Hurrell. A group with 50 members achieved great popularity and recognition, mainly due to the circulation of the journal "**Art and Language**" (first published in New York in 1970 and later in 1975 under the title "The Fox") (Gilbert, 2007: 77-90).

Other art groups influenced by the socio-economic developments and political processes at that time, were the African-American "**Spiral Group**" (1960s) whose members were inspired by the international human rights movement, the "**Feminist Art Program Performance Group**" in Los Angeles (1972), the anti-war American "**Guerilla Art Action Group**" (1969) acting against US wars in Vietnam and Korea and the Spanish "**Equipo Cronica**" (1964 Time Group), denouncing the disorienting role of consumerism (Mesch, 2013: 54,79,101).

In the 1980s in the UK and USA, radical music movements such as punk, reggae and hip hop flourish and new pioneering actions by visual groups and collectives are taking place. Typical of these are the visual arts collective "**Colab**" (Collaborative Projects, 1980) (Moore, 2007:203), "**Group Material**" (1980) (Moore, 2007:204-206) and the "**ACT UP**" group concerning the social issues of AIDS (Mesch, 2013:139). In Europe during the 1990s, the Slovenian Art Group **NSK** was founded, expressing an era that is marked by the turmoil in the Balkans and the fall of the Eastern bloc (Monroe, 2008: 330, 349).

From 2000 onwards the rapid technological evolution of the media, and in particular digital and social media, could not leave the art space untouched. Very important groups and collectives are active on the internet, either to promote an alternative artistic expression, or to publicly challenge sociopolitical events and conditions of the time, such as globalization, the extreme speculative financial structures and profit-driven mentality. These groups include the American art collective "**The Yes Men**", the American "**Radical Software Group**", the Delhi collective "**The Raqs Media Collective**" and the "**Manifest.AR**" 2010, which aim to create

space for public art and to exploit the potential of digital technology as a new art form (Mesch, 2013:201-205). There are also art groups and collectives dealing with more contemporary social issues, such as large-scale housing and large refugee flows to the West, due to civil wars mainly in Asian and African countries (such as "**Assemble**" "**Harmony Art Collective**").<sup>3</sup>

### *Greek art groups and collectives*

In Greece, the emergence and evolution of greek art groups and collectives is directly connected to the developments of each era, both nationally and internationally. Their course, in general, is divided into four long periods, in which there were periods of inactivity. Specifically, the first and second periods refer to the first and second halves of the 20<sup>th</sup> Century respectively, the third period is related to the beginning of the 21<sup>st</sup> century until the economic crisis of 2007-2008 and the fourth period is from 2008 to the present. All four periods are marked by strong social, political and artistic developments, such as the restoration of democracy, the changes in the function of the School of the Fine Arts in Athens where greater emphasis was given to Experimental and Contemporary Studies, the new technologies, the impact of the financial crisis. All the above factors influenced the birth, evolution and actions of greek art groups and collectives.

To begin with, the first period and the first greek art group, it was pioneered, in 1916, by the painter Nikolaos Lytras and other modern artists, under the name "**Art Group**", who wanted to express their opposition to the conservative artists of the "Association of Greek Artists". It was essentially a reflection of the rivalry between the academic establishment of the Berlin School and the modern impressionistic approach of the Paris School, which had also been influential in Athens.<sup>4</sup> All of the group's exhibitions, from 1917 to 1940, were the subject of intense debate and controversy between conservative and pioneering artists. In 1949, the Art Group "**Stathi**" made its first appearance. It was a group of many leading artists (Bouzianis, Sohos, Vasiliou, Gounaropoulos, Katraki, Zoggopoulos, Tasos, Sikeliotis), which many of its members were former members of the "Art Group". The work of many of its members was dominated by anthropocentric, neo-realistic and abstract themes and influenced by greek traditional art (as in the case of the "Art Group"), a fact that it lays on their resistance during the Second World War and their strong social awareness. The need of the members to create this group, in addition to its socio-political character, was to promote their works, to make contact with the art traders and to claim, as they eventually did to some degree successfully, their artistic rights to their work.<sup>5</sup> In 1949, another group appeared in contrast to the previous one, the "**Armos Group**", with famous artists, such as Hadjikyriakos Gikas (group president), Tsarouchis, Engonopoulos, Moralis and others. The members of this group were more strongly influenced by the European surrealism and liberalism.

Towards the end of the 1950s, modern art in Europe began to dominate the art galleries and museums and a very lively and intense dialogue about contemporary art began. Many young Greek artists chose to settle in European cities with a vigorous pioneering cultural activity. Such is the case of young Greek artists (Kaniari, Kessanli, Gaiti, Tsokli, Konto) who formed the group "**Gruppo Sigma**" in Rome (1958). These artists wanted to make greek artistic

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<sup>3</sup> Harmony Art Collective, 2018.

<sup>4</sup> Greek Painters. The History of Modern Greek Painting (16th-20th Century), 1976:366-367.

<sup>5</sup> Malama, 2009: 349-355.



expression known in the European cultural space and subsequently developed great personal careers.<sup>6</sup>

The dictatorship in Greece froze the modernization and euphoria of the previous years, while on the artists' side there was a silent boycott, and for two years there was no significant artistic activities. From the summer of 1968 the first attempts for art exhibitions began, under the strict censorship of the Junta which often failed to stop the artists from conveying their radical anti-dictatorial messages, due to the inability of the censors to properly understand the art works. Consequently, many of the displayed artworks had a great appeal to the artistic and political world and ordinary citizens. Under these difficult circumstances, five young artists (Valavanidis, Botzoglou, Katsourakis, Psychopaidis, Dinga) who had long been friends and shared common artistic and political concerns and values, formed the "**Young Greek Realists**" (Art Group in 1971), having a strong association with leftist actions and group participation (Kounenaki, 1988: 23-28).

In the 80s and 90s, the emergence of greek art groups slows down, as the dominant contemporary art world focuses mainly on the artist's privacy, individual creation and behavior, following the general philosophy and culture of the time. Private media were created, focusing mainly on consumerism, fashion and casual entertainment. At the same time we can notice a gradual shift in focus in the field of the art, from sociopolitical events towards an isolated worldview, where art is created for the sake of art and is meant primarily for an elitist corporate audience. Opposed to the current trends, a new art group entitled "**Occupation**" makes its appearance in Thessaloniki (1986-1990), with radical collective actions (exhibitions, occupations, happenings, etc.) mainly aiming to comment on and curb the socio-political establishment of the time.<sup>7</sup>

The third period starts at the beginning of 2000, when very important developments took place in the greek art scene. From 1974 we can notice the renewal of the teaching staff of the Athens School of Fine Arts, a development that subsequently led to the rebirth of the purely academic and conservative curriculum and brought students in touch with contemporary art and current artistic concerns and endeavors.<sup>8</sup> Moreover, at the same time the rapid technological developments in the fields of communication and transport encouraged contact with European artists, and led to more information being available about the cultural developments in European and international visual arts. Furthermore, it strengthened the exchange of knowledge and experience with respected art schools and cultural events abroad. Under these circumstances, new art groups and collectives emerged. Most of them, were created by students or graduates of academic colleges, who sought to find spaces of expression and creativity, as well as to state their unconventional and revolutionary philosophy against the artistic and social establishment of the time, following the prevailing trend of contemporary art. Despite this, cultural exhibitions organized by major institutions still maintained an elitist and cautious attitude towards the new and the non-established art, so young artists did not have many formal outlets to promote their work and ideas.<sup>9</sup>

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<sup>6</sup> Exhibition Tribute to GRUPPO SIGMA, 2015.

<sup>7</sup> Konteletzidou, 2010.

<sup>8</sup> Bozioni, 2017.

<sup>9</sup> Fotiadi, 2013.

Two art groups-collectives came to play a dynamic role in the greek art scene in the early 2000s: the “**Philopappou Group**”<sup>10</sup> (2001) and the “**Urban Void**”<sup>11</sup> -founded in 1998 by artists and architects- whose members, with their bold activities and radical stances, influenced and encouraged many young artists and challenged them to have discussions about the artistic and cultural world. Both these groups had a major impact on the contemporary artistic scene whilst also serving as benchmarks for subsequent active groups and younger artists. Despite existing in the margins of the formal artistic reality, either because of ideological reasons or due to the exclusion of young artists from institutions, they managed to change the momentum of the era and give expression to a large number of restless and creative artists, and also to challenge the process of creating and acquiring an artistic expression.

The global financial crisis was apparent in Greece by the end of 2008. The developments and consequences of the crisis have naturally affected the art world as well. Due to the crisis, museums and galleries in Greece from 2007-08 onwards (fourth period of examination), preferred the most safe and well-known artistic choices and therefore it was difficult for young artists and new art groups to promote their works and find new sources of inspiration and creativity. Despite this, museums and galleries also had the need to work collectively towards social events. Art groups and collectives such as “**Under Construction**” (2008), “**Dada Da Academy**” (2009), **Kernel** (2009), **Salon de Vortex** (2009) and **MIMNE** (2010), “**Kangaroo Court**” (2010), “**Versaweiss**” (2010), “**Campus Novel**” (2011), “**Arbit City Group**” (2011), “**Stigma Lab**” (2011), “**3137**” (2012), “**NI (New Irrationalism)**” (2014), “**FIST**” (2015), “**PLANTS**” (2015), “**4channel Team**” (2018), emerge and carry out socially orientated projects in public spaces of large urban cities or in the suburbs.<sup>12</sup>

Finally, one of the largest internationally known visual arts networking platforms for art collectives is the “**platforms project**”, founded in 2013.<sup>13</sup> Today, it has acquired an institutional role as a self-managed non-profit organization and annually organizes one of the largest “independent art fair” exhibitions of collectives and art groups in the world, with group presentations, discussions, performances, striving to be a bridge between collaborative art forms of the public and institutional private and public actors.

Today, according to the official digital archive of the Contemporary Greek Art Institute (ISET), which aims to record the state of the art in Greece, since 1945, approximately fifty groups and collectives have been registered.<sup>14</sup>

## Methodology

The literature on the emergence and development of art groups and collectives internationally is important, and notable research has been carried out so far. However, regarding greek art groups and collectives, the research is very limited and primarily concerns the description and actions of some distinguished groups of the 20th century. Information and references for the

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<sup>10</sup> Filopappou Group, 2020.

<sup>11</sup> Dioskouridis, 2008.

<sup>12</sup> Contemporary Greek Art Institute.

<sup>13</sup> <https://platformsproject.com/>

<sup>14</sup> Information about the recent art groups and collectives that have not been registered on the ISET is being displayed on the internet and social media (websites, facebook, instagram etc.), while a valuable recording of the art collectives across the country can be found on the website “[ennalaktikos.gr](http://ennalaktikos.gr)”.

period from 2000 onwards is almost non-existent, and no studies have been conducted on primary research concerning the activities, contribution and impact of these collectives. Taking into consideration the above and recognizing the importance of art groups and collectives in the contemporary cultural and social development of Greece, in this study, we attempt to explore the present reality of the artistic and social role of art collectives in Greece. More specifically, we aim to examine their purpose and mission, their artistic orientation and activities, their role in society and their contribution to and impact on cultural production. The period that we examine spans from the beginning of the 21st century until recently, especially from 2007–2008 (the beginning of the global economic crisis and the subsequent collapse of Greece's economy) until 2019.

In order to achieve the purpose of the study, we adopted the qualitative research method by selecting the methodological tool of the interview, which enables us to observe, record and interpret the artists' own experience and personal view of the role of artistic collectives in contemporary art and in relation to today's society in general (Babbie, 2011: 127-129). The interviews were semi-structured, and there were open-ended questions.<sup>15</sup>

The questions can be grouped into three main points:

- *the history of the groups' creation, their artistic expression and works*<sup>16</sup>
- *the effects and role of the group in art and society*<sup>17</sup>
- *the record of group members views* on the general characteristics and attributes of art collectives at national and international levels.<sup>18</sup>

For the period from 2000 to 2019, four representative teams were selected, one before the financial crisis and three after, based on their history, work, dynamic style and contribution to the evolution of the Art Scene in Greece.

The **Philopappou Group** operated from 2001 until 2012 and had a major impact on the independent greek art scene by changing the relationship of the latter with the institutions.<sup>19</sup> The Group carried out a series of experimental activities involving volunteers and artists, focused on the experience of collectivity and the open coexistence of different intentions, ideas and views. The choice of action was spontaneous, through discussions and confrontations, and

<sup>15</sup> It should be noted here that this type of interview provides flexibility in modifying the content of the questions according to the respondent, in deepening some issues during the process, in changing the order in which the questions are asked and in adding or subtracting questions or topics during the discussion. The open-ended questions allow the respondent complete freedom to express his or her preferences, thoughts and feelings, organizing his or her answer as he or she means it.

<sup>16</sup> e.g. "Tell us a few words about the team, its purpose and its action"; "What are the most important reasons that led you to create this group and to choose that particular name?"; "Are the reasons today the same as the original ones or have they changed?"; "What are the most important influences and sources of inspiration for the group?"

<sup>17</sup> e.g. "How does your team understand the importance and roles of today's artwork?"; "What is its attitude towards the World of Art?"; "Could you describe the most representative public reactions to your group's actions?"; "Which group's action would you choose/prefer and why?"; "How has the financial crisis affected the actions of the group?"; "What are the dominant expressive instruments in your group?"

<sup>18</sup> e.g. "Which should be the role of art and in particular the role of art groups in today's cultural and social reality?"; "What are the differences between individual artistic expression and collective artistic action?"; "What is the significance of public and public space for art groups?"; "Which art groups and collectives, at national and international level, do you consider as important and leading due to their presence and action and why?"

<sup>19</sup> Interview with the founder and a member of the Group (Date, 10.02.2019).

all actions took place in a public place, arousing interest in the visual arts and in the wider social community.<sup>20</sup>

The **Under Construction** group appears in 2008, after the great changes of the previous years in the greek art scene have been assimilated and a direct contact and interconnection with the international artistic genre is established.<sup>21</sup> The **Campus Novel Group**<sup>22</sup> was set up in the midst of the crisis, at the end of 2011<sup>23</sup> and the visual platform called **Platforms projects**, which has been operating as an independent activity for the last three years, as one of the largest visual platforms in the world.<sup>24</sup> The Platforms projects has acquired an institutional role as a self-managed non-profit organization and annually organizes one of the largest "independent art fair" exhibitions of collectives and art groups in the world, with group presentations, discussions and performances, striving to be a bridge between collaborative projects and private and public sector organizations.<sup>25</sup>

## Presentation and analysis of research findings

In the course of our research, important information was found on the evolution of art groups and collectives in Greece from 2000 onwards, mainly in the years before the crisis and until 2019, their connection to the international art scene and their interaction with socio-economic reality.

- Two members of the **Philopappou Group** highlighted the change in the profile and function of the Athens School of Fine Arts. They noted the intense contact and influence from abroad and the integration of international artistic developments in their work. They also talked about the general economic euphoria and over-consumption, which prevailed in Greece before the economic crises. They mentioned young artists' need for more innovative and experimental artistic creations and the necessity to search for alternative ways of presenting their work, because institutions were not interested in young artists' work. These adversities led to spontaneous collective actions in public spaces, and the function of the Group without structures and rules, in a climate of enthusiasm, optimism and freedom.
- The groups that followed, from the end of 2010, talked about the fruits of the positive changes of the previous period in the field of artistic studies and the interest of some institutions, museums and galleries to contemporary artists. At the same time, they referred to the gradual socio-economic changes due to the global and national crises and how this, while significantly restricting official art activities, gave another impetus to the independent art scene and art groups. Participants describe the creation of their

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<sup>20</sup> <http://omadafilopappou.info/>

<sup>21</sup> Interview with one of the four members of the Group (Date, 12.01.2019).

<sup>22</sup> <http://campusnovel.blogspot.com/>

<sup>23</sup> Interview with three of the five members of the Group (Date, 03.02.2019).

<sup>24</sup> Interview with the Director of the Platform (Date, 08.03.2019).

<sup>25</sup> <https://platformsproject.com/>

team, from 2008 onwards, with more specific goals and structure than the previous group in the early 2000s.

In all interviews, the key points of the group members' views and positions are as follows:

- The artist receives and transmits social and political developments at national and international levels.
- Group members treat the role of the art group differently from the perspective of a single artist. They believe that the main characteristic of the group is all about the dynamics of collectivity, team spirit, cooperation, conflict and disagreement, different perspectives. Finally, they argue that the team offers the experience of collective work and some in situ work.
- The works of the group take place almost exclusively in public spaces, as it seeks to highlight the positive and negative aspects of the greek public space and the urban-regional landscape.
- Almost all groups are dominated by the culture of the open group, with the entry of new members and the departure of old ones, while all groups have collaborated periodically with other groups.
- Everyone agrees that the relationship between contemporary artists and institutions is not uniform. Some groups are open to cooperation with the institutions, some only where appropriate, and others are anti-institutional.
- Everyone argues that communication with relevant organizations abroad is more immediate, frequent and intensive because of visits to artistic events abroad, for collaborations and participation in group activities, for postgraduate artistic and / or interdisciplinary studies, and even for permanent residence are very frequent. Also crucial, regarding access to information and communication, is the contribution of digital technology, the internet and social media that make it possible to interact within Greece and to interact with the international art scene.
- In particular, the interaction with the art groups at national and international level focused on the interview with the Platforms Project artistic representative. However, there are differences mainly in the attitude of communication, with foreign groups being more open to dialogue, exchange of experiences and views and efforts towards further cooperation.
- Regarding their cooperation with the institutions, they noted that there has been a change, since the groups now receive funds from private institutions (funding, sponsorship, etc.) and the State, as well as from the European Union. This development constitutes, for many groups, the main reason for their establishment. Moreover, they pointed out that international exhibitions (eg Biennale, Documenta, etc.) had begun to invite art groups.
- In all interviews it was said that art groups are consistently being created in Greece for different reasons: for a single work, for an action, for maintaining specific creative goals. That often entails them working together with each other and gives strength and vitality to the independent art scene.

- In addition, many emphasize that the greek landscape of artistic collectives is in a state of constant mobility and is always evolving; there is no effective mapping and there is a fluidity and movement of groups between the marginal and formal greek art worlds.
- Everyone believes that foreign art groups and collectives are now well established in the cultural scene, have constant and reliable funding and support from public and private institutions, making them more structured and more capable of creation and duration. On the other hand, they point out that this creates dependencies and obstacles for the greek groups in terms of expressiveness.
- The same view is also held on the very important influence of the group on the individual artistic career of group members, due to their close cooperation and coexistence with other artists, the experience of creating a joint work and the amalgamation and management of different views, personalities and of thoughts.
- Overall, they agree that public attendance and participation in their activities is limited, as is the case in Greece in general, and that they are not used to watching artistic activities in public spaces. Because of the presentation of the projects in public spaces, interviewees argued that they might not have a thorough view of the nature of the public visiting their work.
- Finally, everyone comments on the reflection and dialogue that has begun on the changes that have taken place in recent years in the field of contemporary art and its relationship to economic and communication power. They agree that there is a dispute about the quality of contemporary works and young artists being promoted by major museums and galleries and the power of the global art market. There has also been much discussion of the developments in the field of art collectives, which have a strong critical and dividing character and outlook, but cannot change the socio-economic conditions, a view that has prevailed in the past and has focused on the effective management they must adopt in cooperation with the public and private institutions, so as not to violate their principles and values.

## **The relationship of contemporary Greek art groups with foreign art groups today**

The greek artistic groups, during the period under consideration, observe without delay the changes and developments in the international art scene. This has helped to inspire changes at the national level, after the upgrade and modernization of the academic curriculum in art schools, following the equivalent ones that function abroad. However, greek art groups do not have the same support and recognition that is now established for overseas groups.

This fact often leads greek art groups to easily disintegrate or migrate, seeking better conditions for creativity and expression. In addition, while the country's cultural organizations support solo exhibitions by contemporary Greek artists, they remain cautious and "indifferent" to the work and works of greek art groups.

The media coverage is minimal, and they do not promote the activities of the art collectives in the country, unless they participate in large-scale annual exhibitions (eg. Athens Biennale, Documenta 14, etc.). All of the above shows that art groups in Greece are still treated as a

cultural activity marginalized in the art world, characterized as anti-institutional and perhaps not creating works to such a high standard as those of the greek groups abroad, between 1940 and 1990. On the other hand, foreign art groups, collectives and other forms of artistic collectivity (e.g. platforms) are an integral part of the contemporary art scene and constantly attract the attention of museums, galleries, social media.

## Conclusion

Despite the peculiarities and difficulties faced by greek art groups in relation to their counterparts abroad, there is a dynamic and optimistic mood, as illustrated by the comments of the members who participated in the interviews. The fact that the majority of group members are of a fairly young age (they possess the enthusiasm and eagerness of youth), is an important element that gives strength and hope to their efforts.

In particular, the period of the economic crisis in Greece inspired or even forced many young artists to pursue the creation of art groups and collectives, and mainly led these collectives to take more risks, try new forms of creative expression, and to become even more innovative in seeking sources of funding and support.

Efforts such as the "platforms project" and many other art groups' activities, demonstrate that gradually the independent art scene at the collective level, acquires a remarkable creative role, with importance in the art world and participation from the international art world. This development will inevitably mobilize institutional and non-cultural actors to take more risks regarding collaboration and participation in these efforts and will make them more receptive to new challenges and proposals from art groups.

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## ENTREPRENEURIAL SKILLS AND START-UP CHALLENGES IN THE ALBANIAN ECOSYSTEM

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### Abstract

Youth is the most vital part of a country labor force. It has the ability to impact the economic and societal development of a country through enhancing technological and innovative ways of doing business. Youth is the category that has the capability of fitting to the fast changes of international markets. Even though Albania is a small country in Balkan, it has the precedence of having the youngest population in Europe. As the Albanian business market is expanding day by day, entrepreneurship is developing with new start-ups being established. Albania youth possess a vital spirit of entrepreneurship, characterized by determination, hard-work and innovation. In the past years, programs and organizations that promote youth entrepreneurship, have tried to boost start-up initiatives. A lot of youngsters are focused on founding and managing their own start-up companies. This study focuses on a detailed analysis of start-up initiatives in Albania considering Albanian youth labor skills, their ability to become entrepreneurs and the government support towards them, both in incubation and financial way. The research aims to measure the entrepreneurs' motivation before and after establishing their start-ups with their labor skills and scale of innovation implemented. Primary data collected through surveys with 30 startup entrepreneurs located in Tirana, capital city of Albania will be used to provide an understanding their opinions over the current entrepreneurial skills and ecosystem in Albania and investigate for recommendations to smooth it.

**Keywords:** Start-ups, Entrepreneurial skills, Challenges, Ecosystem, Albania

### 1. Introduction

Youth is the most vital part of a country labor force. It has the ability to impact the economic and societal development of a country through enhancing technological and innovative ways of doing business. Youth is the category that has the capability of fitting to the fast changes of international markets.

Starting a business is a long process of market research, good idea development and an expensive dream turn into reality. Gartner (1985) proposed the plan of a Start-up business as an interaction of personality, environment, organization entrepreneurial behaviour. Bird (1988) stated that personal characteristics and environmental factors are two of the main factors which define entrepreneurial intentionality. According to her, intention is a state of mind where a

person's attention, behaviour, experience and desire is focused in order to achieve a specific object. Greenberger and Sexton (1988) presented the creation of a new venture as a process in which personal characteristics like personality, interact with environmental events to influence decisions concerning creation of the new venture. Beside personal skills and environmental stimulation, there are a lot of variables influencing Start-up creation like: financial and investors support, demographic composition, experience, etc. Kotha and George (2012) in their study concluded that founders with previous experience in business or start-ups were able to raise more funds (from both formal and informal sources) compared to entrepreneurs who entered the market for the first time. In this study, the relationship between the motivation of founders to start their own start-up with demographic conditions, previous business experience and education will be further expanded.

Even though Albania is a small country in Balkan, it has the precedence of having the youngest population in Europe. But, transition from University to the labor market is becoming a major challenge nowadays. Albania youth possess a vital spirit of entrepreneurship, characterized by determination, hard-work, innovation and creation. In order to achieve high economic development, successful youth employment and right labor skills development, the triple helix collaboration university-industry-government needs to be strengthened to advance the overall future economy.

The main purpose of this study is to find out whether the Albanian youth have the right labor skills, mindset, ideas and support to start and grow a long-term successful business. In support of this study, the following objectives will be used:

- To determine the motivation of Start-up founders on developing their idea in Albanian business market.
- To determine whether youngsters today have the right labor skills and mentality on starting a Start-up or working on a normal business.
- To follow-up the existing Start-ups in Albania and their performance.
- To establish in what extent is the involvement of Albanian Government in supporting Start-up idea.
- To determine the founders level of motivation before and after entering the business market.

## **2. Study Background**

While conducting analysis and researches concerning the labour market in the Albania, the available information is scarce, because of many years of transition and the ongoing developing informal sector, resulting in lack of reliable sources of information (Pema 2010). One thing that should be taken in consideration is the fact that almost all the motivated youngsters are oriented towards the founding of their own Start-up rather than working for a normal business. Bosma et al. (2004) conducted a study on investment in the human and social capital over the improvements of the performance. They concluded that investing in human and social capital increase the entrepreneur's performance.

According to Hackaj (2015), youngsters move very frequently in and out of the labour market because they are not satisfied by the job they are doing, payment and work conditions. The transition of young people from the University to the Labour market is difficult and with a long-time gap in between, which sometimes is associated with discouragement. Hackaj (2015) concluded that most of the time this results in skills mismatch. A lot of higher educated youngsters work for the Business Process Outsourcing sector or Service sector, while this job could be handled by people with lower education.

INSTAT (2017) results show that at least 87,5 % of individuals are hired through family or other relative connections. This deepens skills mismatch and unfairness of labour market.

On a recent study conducted by Albanian Investment Council (2017) over “Labour Market Quality”, businesses main concerns were towards Universities. According to them, education doesn’t match the labour market needs and the curriculum should be oriented according to the business requirements. Because of lack of good education, businesses are oriented towards hiring experienced people rather than recently graduates. The triple helix collaboration between University, Industry and Government would contribute on closing this gap, by providing the market more qualified graduates and also employment or entrepreneurial opportunities for the graduates.

Due to these reasons, and the lack of job opportunities, youngsters are oriented toward becoming self-employed by founding Start-ups rather than entering the complicated Albanian Labour Market.

Over the last decade, a lot of entrepreneurial ecosystems, accelerators, incubators and projects are supporting entrepreneurship and providing a stimulating start-up environment in Albania. Low and MacMillan (1988) refer to a start-up simply as the “creation of new enterprise”. The new land of Start-ups, the desire to start something new and the idea of being an entrepreneur is fascinating for the youngsters today. There should be a growing awareness that entrepreneurship is a “process of becoming rather than state of being” (Churchill et al. 1989). Business market is welcoming the new and innovative ideas brought by youngsters, which seem to have as their priority the fulfilment of their aspiration rather than profit.

The number of Start-up operating in Albania, mostly in Tirana is increasing day by day. They cover mostly the part of ICT, but related fields like agriculture and medicine are also covered. All Albanian Start-ups has merged technology with customer’s needs by producing a user-friendly product. Government as well as non-governmental organizations have contributed on founding some incubators and accelerators aiming to support the Start-ups in every step towards their creation and success.

As a post-communist country with just 3 decades of open economy and private sector experience, research on entrepreneurship and youth entrepreneurial skills is relatively new in Albania. Starting from 21<sup>st</sup> century scholars have been focusing on researching first small and medium enterprises market operating challenges (Asllani et al. 2014; Bitzenis and Nito 2005; El Alaoui et al. 2016; Kruja 2013; Kruja 2020; Rinkel et al. 2016; Xheneti and Smallbone 2008). Unfair competition, political instability, lack of financial resources, taxation, labor skills, networking, are among the obstacles and barriers faced by entrepreneurs in the Albanian ecosystem. Asllani et al. (2014) suggest that providing an “entrepreneurial economy can foster economic development, systematically fight corruption, and allow Albania to economically join the rest of Europe” (p. 243). Meanwhile Xheneti and Smallbone (2008), conclude that

government is the key to establish proper institutional arrangements for durable development or productive entrepreneurship, Rinkel et al. (2016) and Kruja (2020) advocate collaboration with similar organizations; collaboration between organizations and academia; collaboration between private and public sector as a solution to entrepreneurship and economic development.

Research on entrepreneurial intention and orientation of university students has been the next focus of scholars starting from the 21<sup>st</sup> century's 2<sup>nd</sup> decade (Kruja 2019; Kume et al. 2013; Zenelaj and Kruja 2017). Kume et al. (2013) measured Tirana University students' entrepreneurial intention and orientation, where 53.6% of respondents considered starting up a business, 5.8% of respondents were self-employed, while only 0.91% of them were successful in their business. The research conducted by Kruja (2019), on a sample of 211 private university students in Tirana, emphasised that enforcing the collaboration of students with industry and governmental institutions in supporting their innovative ideas will reinforce their intention towards entrepreneurship.

### 3. Methodology

This study focuses on analysing the Albanian youth entrepreneurial skills as well as their intention and orientation towards entrepreneurship. Primary data collected through surveys with startup entrepreneurs are used to provide an understanding their opinions over the current entrepreneurial skills and ecosystem in Albania and investigate for recommendations to smooth it.

Respondents were mainly based in Tirana, capital city of Albania, and the data were collected over a one-month period from April to May 2017. The survey was prepared in three sessions: (1) related to demographic information of respondents; (2) related to start-up features; (3) an open question where responders could give their opinion and recommendations. In order to not have data loss or miss-interpretation during translation the survey was conducted in English. All the surveys were sent online to a sample of 40 Albanian start-up entrepreneurs, while only a total of 30 responded, with a response rate of 75%. This sample is considered large enough to represent and reflect the characteristics of the entire population, all start-up companies in Tirana for the period.

### 4. Findings and analysis

From 30 respondents 46.7% were aged between 25 to 30 years old, 43.3 % were aged from 21 to 25, 6.7% were aged between 18 to 20 years old and only 1 responder (3.3%) was aged over 30 years old. From this age distribution, we can see that mostly Start-up founders are young people aged between 21 to 30 years old.

Table 1. Sample characteristics

<b>Gender</b>	Male	60%	<b>Education</b>	High school	6.7%
	Female	40%		Bachelor	70%
<b>Age</b>	18-20	6.7%	Master	23.3%	

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21-25	43.3%	<b>Business</b>	Yes	73.3%
25-30	46.7%	<b>Experience</b>	No	26.7%
<30	3.3%	<b>University</b>	Yes	63.3%
		<b>knowledge/ skills use</b>	No	36.7%

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Beside age, gender was another variable taken in consideration. From this survey, 60% of the responders were male and 40% of the responders were females. Although, males make the majority of Start-up founders, the difference between them is only 6 responders, which does not leave female founders too much behind in the market.

Related to the respondents' education, 70% of the founders hold a bachelor's degree, 23.3 % hold a master's degree, and only 2 respondents are high school graduates. When asked about the value of the knowledge gained by University, whether were they useful on starting their business, 63.3% answered yes and only 36.7% answered no.

Beside education, another important variable taken in consideration is experience. Founders were asked if before starting their start-up, they had any previous experience in business including here, being employed in a business, have been owner of another business before or even being part of any family business. 73.3% of the responders have had previous business experience while for 26.7% these start-ups are their first business experience. Added, all the founders were motivated by something in order to take the decision and responsibility of starting a business. 76.7% of the responders saw this business as fulfilment of their aspiration. 66.7% of the responders entered Start-up business market because of profit, 43.3% wanted to enrich their country market, 16.7% because their own business would provide them flexibility and 13.3% simply because they wanted to become the face of a brand which would also provide them fame.

In order to gain a more specific insight about the Start-ups in Albania, this research took in consideration variables related to employees' labour skills, the field they operate, what they have brought to the market, government support, etc.

According to the data collected, the number of employees in Start-up variate from 1 up to 20 employees. From the figure 1 bellow, mostly, Start-ups entrepreneurs hire up to 5 employees which makes 33.3% of the responses, followed by 3 employees which makes 26.7 % of the responses. 63.3% of the Start-ups founder have hired people aged between 21-25 years old (figure 2), followed by 36.7% who have hired people aged 25-30 years old. Mostly, the employees are young people.

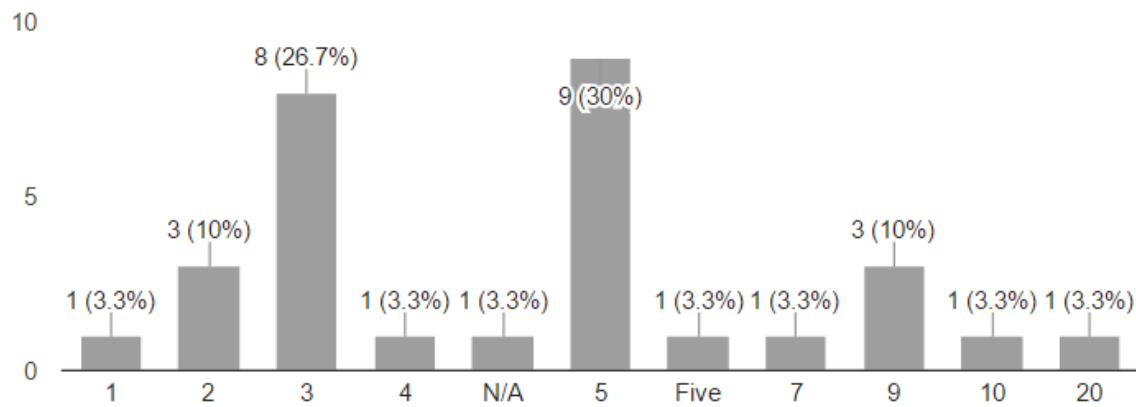


Figure 1. Employees number

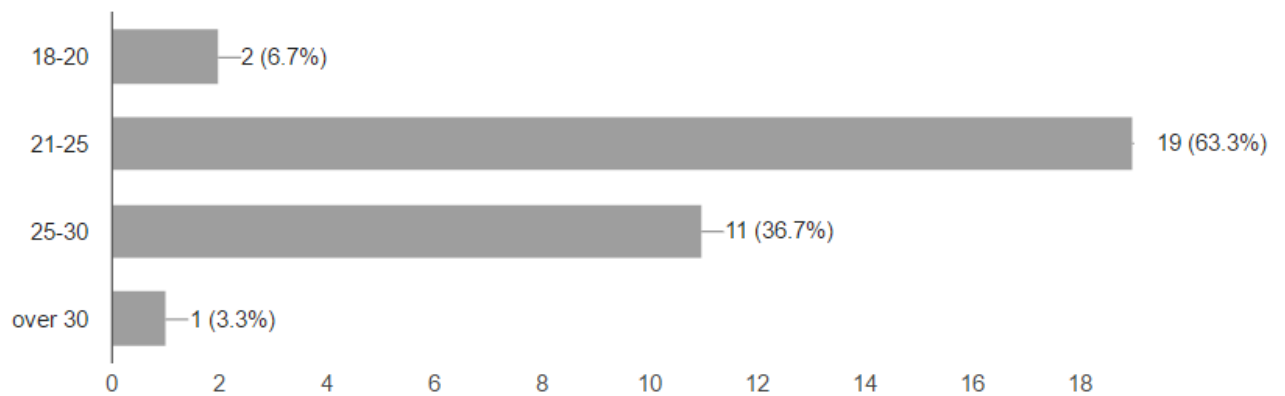


Figure 2. Employees average age

When asked on a Likert scale from very unhappy to very happy about their employee’s skills, 46.7% of the founders answered that they were happy with their employee’s labour skills. 20% of them were very happy while 16.7% were unhappy and neutral. None of the responders was very unhappy with its employees’ labour skills.

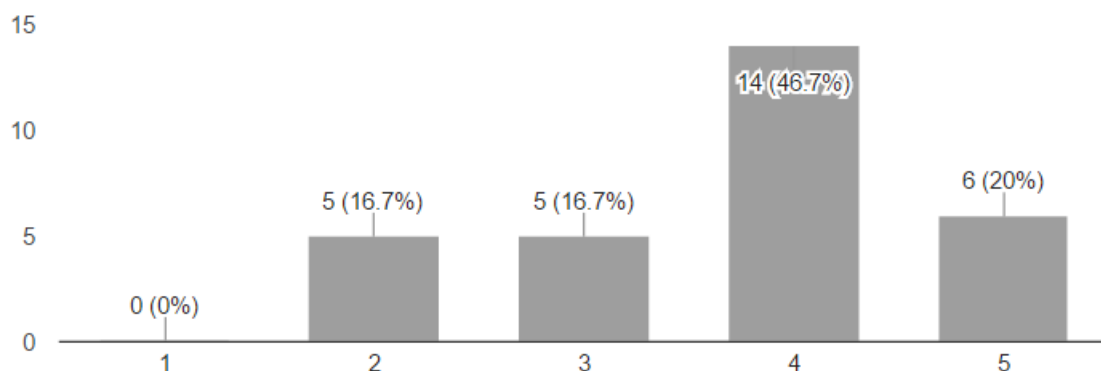


Figure 3. Employee's labour skills

Another important part that this survey took in consideration is the Start-up nature and the market it operates. When asked about the amount of time that these businesses have been operating 60% of the responders answered 0 to 1 year. 30% have been on the market from 1 up to 3 years and only 10% have been on the market for more than 3 years. These means that Start-ups in Albania are mostly new and have just entered the market.

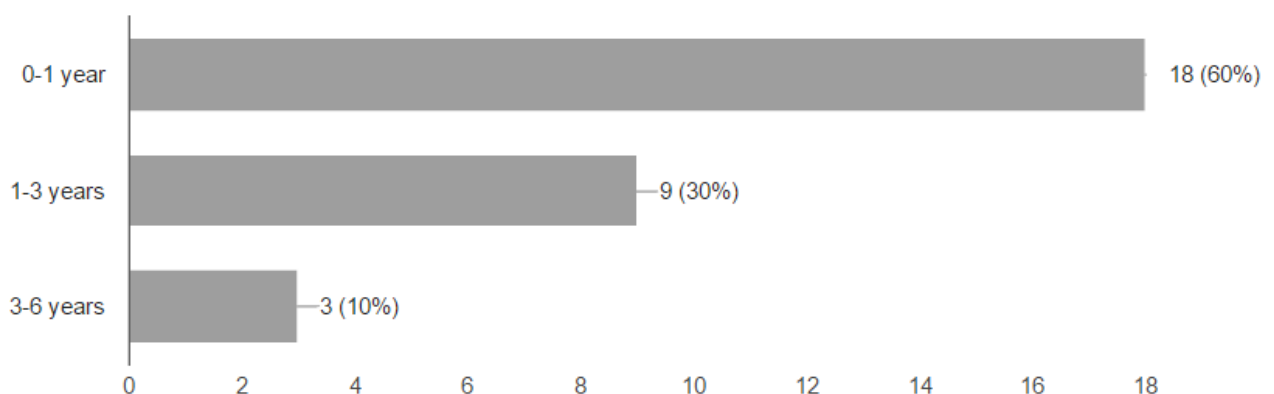


Figure 4 Years of operating in the market

What they provide to the market was divide into 4 choices: Innovative Idea, which took 73.3% of the responders, solves a problem with 50% of the responses, new way of doing something selected by 40% of the responders and technology used selected by 50% of the responders. So, majority of start-ups have brought to the market innovative idea, which solves a problem and at the same time uses technology.



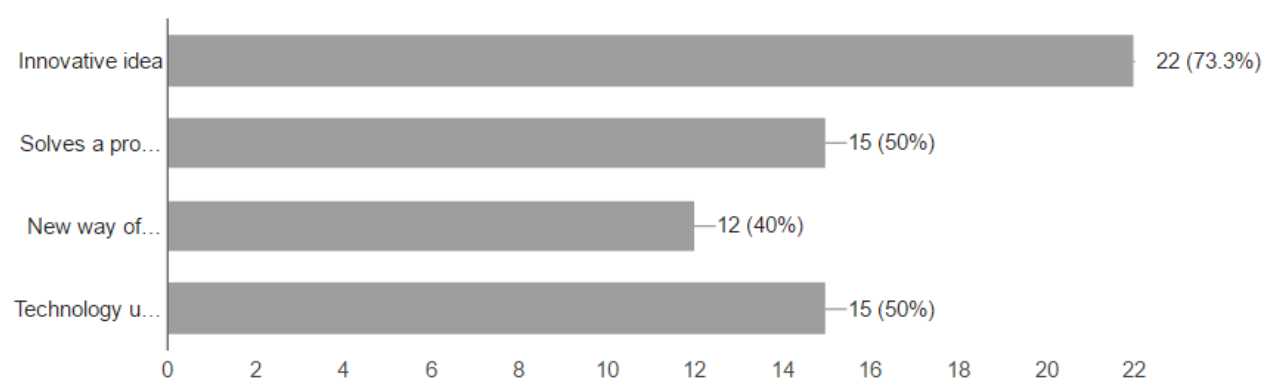


Figure 5. What is unique about your company?

73.3% of survey responders have been part of Start-up competitions and 26.7% have not participated on them. Those who answered yes, were further asked if their participation in these competitions have helped them on their Idea Development, Financial Support, Incubator support or in any other way (figure 6). 58.3 % chose Idea Development, 20.8% found financial support and 12.5% were able to find Incubator Support. Responders who selected other, explained that these events helped them to create network, better relationship with the public or did not help them at all.

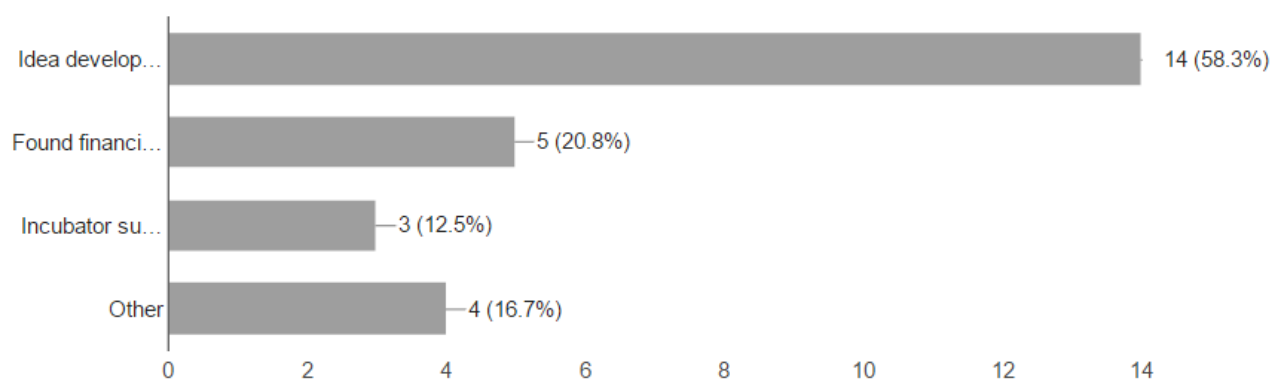


Figure 6. Start-up competition support

Meanwhile, when asked whether they had been financial supported by government or non-governmental institutions (figure 7), only 13.3% of them had benefited, while 86.7% not. Supported founders were furtherly asked about the organization which helped them. Among chosen organizations were AIDA (1 responder), Ministry Incentives (1 responder), EU (1 responder) and UNDP (1 responder).

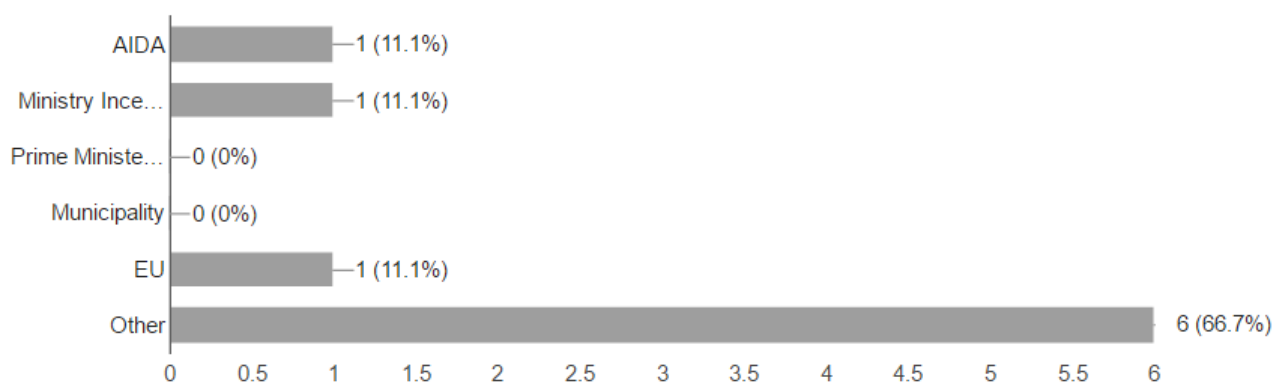


Figure 7. Organizations financial support

On the other hand, founders who found incubation support were asked about the incubators which supported them and 40% of the responders found support by Tirana Talent Garden, 10% by Innovation Hub and 50% were supported by other incubators like: Protik Innovation Center or Garage, while others responded that these organization offer their help but did not contribute to their business in any way.

Founders of Start-up businesses who were not supported in financial way by government or any other organization, were furtherly asked about the way that they finance their business (figure 8). 80% of founders have started and continue to finance their business with personal capital, 33.3% of founders have been able to find investors and 16.7% were supported by their family members.

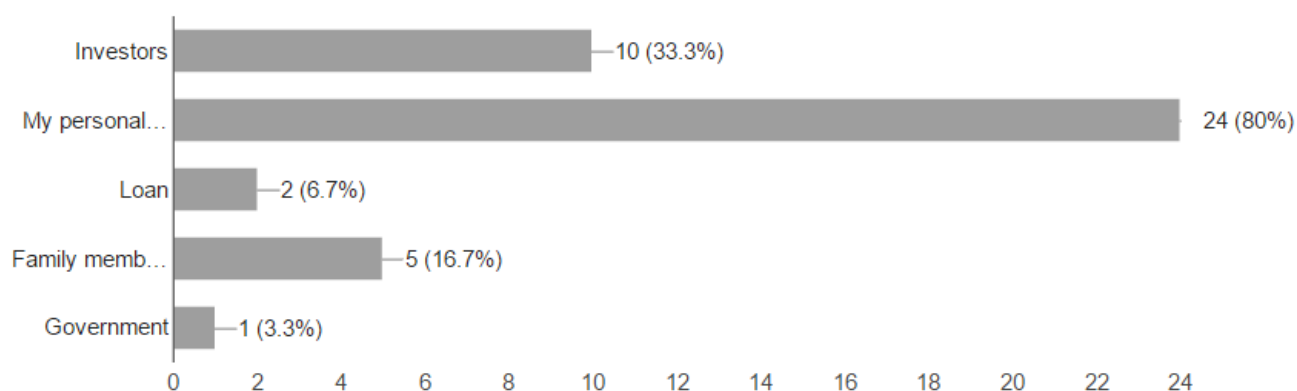


Figure 8. How do you finance your business?

One of the problems treated in this survey was the main barriers towards the sustainability of the Start-up businesses in Albania (figure 9). As expected, the main problem according to 80% of the founders is Financial Support followed by Laws and Regulations with 56.7%. 40% of

founders are find labor skills of their employees as a barrier towards their business development and 23.3% have problems with Networking.

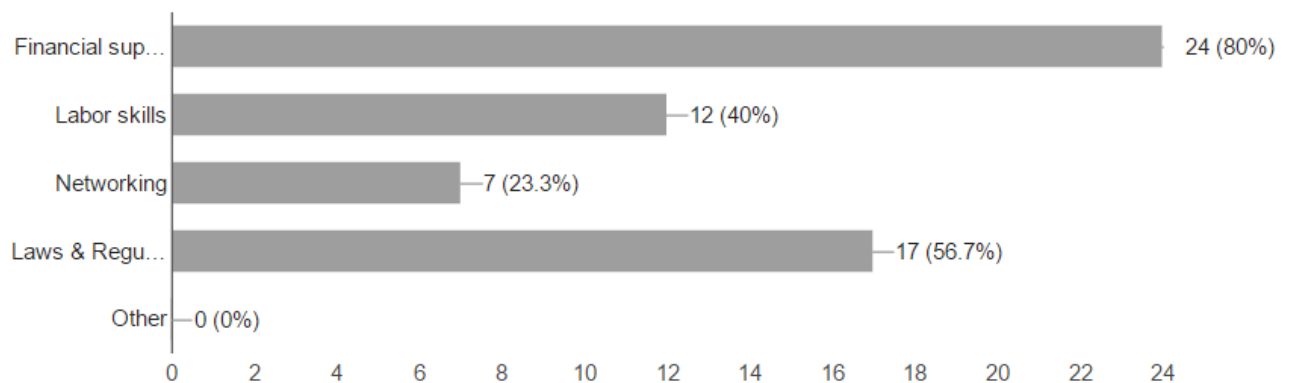


Figure 9. Market barriers

Based on the above-mentioned reasons, founders were asked whether these reasons affect their business lifetime (figure 10). 70% of founders stated that they do not plan to go out of the business at all, 23.3% stated that they may go out of business in the next 5 years and 13.3% were thinking to exit the business market in the next 2 years.

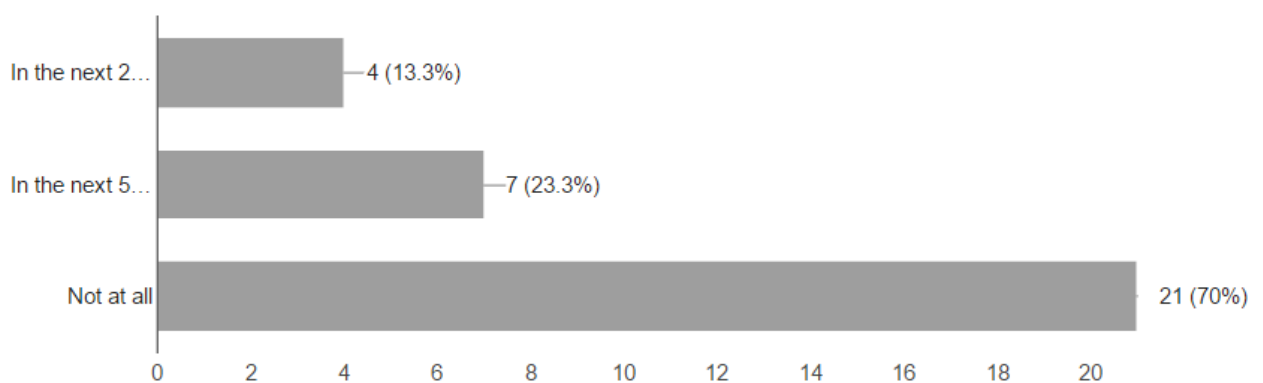


Figure 10. When do you see the exit happening?

To test whether entering in the market has changed entrepreneurs' motivation to operate, data was collected through a likert scale from 1 to 5 and tested through Anova analysis in SPSS. The motivational variable mean before entering the market resulted 4.43 which is higher than the mean of 3.67 after entering. The Anova test resulted on entrepreneurs' motivation to be statistically different ( $0.036 < 0.05$ ) at a 5% level of significance. So, it can be concluded that challenges faced by them in the market has decreased their operational motivation.

## 5. Conclusions and Recommendations

First of all, this study treated an overall analyse of the labour skills of Albanian Youth. It took in consideration the changes of youth regarding education and labour market in these years of transition in Albania. Further, it presented a general overview of the characteristics of the Start-up businesses in Albania, by taking in consideration the motivation of founders to enter this market and government support towards these new innovative ideas brought by these founders.

On the other side, surveys result overuse of knowledge gained by universities, is different from expert's opinions. Founders stated that they did use the knowledge and skills that gained from university in starting their business. Also, most of the founders, despite the young age of their employees they were satisfied with their skills.

The questioner results gave an overview of the founder profile and Start-up company related to those specifications mentioned in the Literature Review. Founders were mostly young people aged between 21 to at most 30 years old with a higher percentage of males. Most of the responders did have in a way, previous experience in business which somehow made it easier for them to enter the market. Most of the founders were on their first years of operation and their employees' number were between 3 to 5 aged between 21 to 25.

Start-ups are mainly new venture started by young people with an innovative idea. This is supported also by our survey results, which showed that Start-ups founders were mainly aged between 21 to 30 and their ideas were innovative. Other studies have concluded that, since founders of Start-ups are young people, they do not have a capital and their ideas are supported by investors or government. While in Albania, based on the survey result, most of the founders have financed their business by personal capital, and a very few of them were supported by government organization like AIDA or Ministry Incentives.

Concerning the labour skills, founders responded that they were happy with their employee's skills. Added, founders themselves do not plan to go out of the business at all, which means that until now they are successful, and they do have the right skills to manage their own business.

The aim of this study was also to find out the motivation of founders towards creating their own company. Majority of them decided to start their business because they saw this initiative as fulfilment of their dream without leaving behind the profit, they would gather from it. Some of them aim to enrich their country market by bringing to the business market innovative ideas which solve problems for public or businesses using mostly technology. Concerning the motivation of founders before entering the business market and at this moment of their business, survey results showed that the motivation of founders now has decreased.

These last year's attention is given to Start-up companies in different ways. Different competitions are organized each year and according to our survey most of the current Start-up founders have participated in these competitions which helped them to further develop their idea. Added, government support towards these businesses was another issue treated in this research. Almost all of the developers found no financial support from government, and only a few of them found incubation support. Government view of Start-ups is still weak in Albania. Even though it has supported creation of different accelerators it still needs to support these fragile businesses in financial form by offering many other types of funds. Added, survey results towards barriers of Start-up sustainability showed that finding financial support was

their main problem, followed these by laws and regulations. Since government doesn't show much of support to these businesses, they were forced to invest and start their company by their own capital. Only a few of them had the ability to find investors or were supported by their family. But at the same time, despite these barriers, survey result show that majority of founder's plan to not go out of business in the next 2 up to 5 years.

All in all, Albania lacks employments opportunities according to the skills of the youth, which makes it difficult for them to find a job in a formal way. Based on this, Albanian youth labour skills is following a new trend of entrepreneurship. Their ideas, desire and motivation of starting their business is not linked with government support. Despite this, survey results showed that they are not discouraged, and they will continue to be part of the market for the upcoming years.

In order to avoid skill mismatch and contribute into a better youth labour skill, it is needed to concentrate on the business concerns towards education of youngsters today. To create satisfaction of both sides, business and youngsters a cooperation between Industry, Universities and Government should be taken in consideration. This would add value to Universities and create a new image of graduating from it. On the other side, Business would lower their staff training cost, facilitates the employment process, increase satisfaction toward youth labour skills and decrease the skill mismatch gap.

Because of the lack of systematic and frequent update of current and future trends of youth skills towards market needs, this research recommends creation of a platform that would establish profession according to market's needs. It would support youngsters to follow the right education and at the same time would help businesses in their recruiting process.

Concerning Start-ups markets, based on survey results, literature review and expert's opinion, it is recommended to Albanian Government to show much more support to the current Start-up businesses. Financial incentives are the main concern of founders towards government. Added, laws & regulations consider Start-ups as normal business, which have high costs for new founders. In order to support youngster's innovative ideas, it is recommended to facilitate the laws and procedures for the first 2 years.

Start-up founders recommend that Government should empower more the Start-ups based on their quality and merits. Also, it should offer real opportunities for young entrepreneurs to get investments and not just make a show out of them.

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## THE IMPACT OF PROJECT-BASED LEARNING ON STUDENTS' MOTIVATION IN MATHEMATICS

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### Abstract

The study was aimed to assess the project - based learning (PBL) activities' effects on student motivation. Two ninth-grade classes were randomly selected for experimental and control groups. Pre-test and post-test data were collected for measure of mathematics motivation of students. Data was analyzed using t-test. The results indicated a significant impact of peer instruction on achievement and an improvement in mathematics motivation.

**Keywords:** Project - based learning, mathematics motivation

### INTRODUCTION

Project training is one of the teaching methods aimed at students in our country and around the world. That is one of the methods which can be used in students that are responsible for students' training, development, and availability. Teachers who work in school demonstrate that when studying is active, students will learn easier and will help inspire other students. At present, the teaching of mathematics discipline is one of the major problems in the school curriculum. Traditional education methods of teaching mathematics are teacher-oriented, which negatively impacts the knowledge of mathematics of the students. Many high school students are negatively impacted by traditional methods, according to Geist and King (2008) [1]. Regardless of that fact, the traditional method is still used by teachers, taking a lot of time in talking rather than creating a conducive environment for effective peer learning.

The project method is an in-depth exploration of a real-world topic worthy of the student's attention and efforts (Chard, 2011) [2]. Project - based learning (PBL) is a teaching method in which students learn their valuable skills by doing real projects (Holubova, 2008) [3]. The project learning approach is teaching strategies that enable teachers to guide students through in-depth research in the real world (Chard, 2011). In Project Learning, students learn to take responsibility for their learning, this teaching helps students build a solid foundation on which they can work with others throughout their lives. This method places an emphasis on building a comprehensive unit around an activity that can be performed in or out of school (Pattnaik, Chakradeo and Banerjee, 2014) [4].

According to Knoll (1997) [5], project learning is considered a means by which students (a) develop independence and responsibility, and (b) practice social and democratic forms of behavior. Knoll noted that project learning was brought into the curriculum to help students learn at school, study independently, and combine theory with practice. The project method is



a challenge-based, goal-oriented activity that promotes successful and efficient collaboration where students' activities gain more weight than information communication by the teacher (Szállassy, 2008, p. 49) [6].

Project-based teaching is imaginative throughout its focus on cooperative learning. Students also create tangible results to represent what they have managed to learn. To respond to a complex issue, problem or challenge, students use technology and inquiry. PBL focuses on student-centered independent review and group studying, as referred to this one in control, with the teacher acting as advisor. Activities match the real-world tasks of professionals as nearly as possible instead of classroom-based tasks. This motivates academic interpretations and allows learners to perform different roles and develop knowledge that can be implemented more than a single well-defined approach. Finally, it enables for a range and variety of results that are aware of the different approaches, instead of a single correct response by implementing preset rules and regulations.

Project method is covered under different topics such as Project study, Project approach and Project-based learning and is considered as one of the basic teaching methods. Project learning is an action-centered and student-oriented learning initiative in which students are involved in practical problem solving for a specific period of time. Projects in Physics, for example, can consist of the construction of a meter bridge, a surge tank, the design of a DC engine, or the shooting of a moving video film. Often, projects are initiated by the teacher, while planning and execution are given to students, individually or in groups. Unlike traditional methods, projects focus on implementing, not giving. Implementing and focusing on specific knowledge or skills, and are more rigorous than demonstration, knowingly lecturing to promote intrinsic motivation, independent thinking, self-confidence and social responsibility (Knoll, 2014) [7].

When you successfully implement project learning, teachers and learning students are motivated and actively involve themselves and grow as individuals and collaborators in producing high quality work that helps them (Chard, 2011). However, information is not obtained sequentially in project learning, and if it is not well planned and executed properly, it may not be completed in time. These are some of the disadvantages of the project learning method claimed by Pattnaik, Chakradeo and Banerjee (2014).

Projects are used as a teaching tool in education and in achieving results and gaining various skills (Holzbaur, 2010) [8]. Holzbaur also argues that projects are a powerful method for teaching, training and research in education. However, Holzbaur also noted that there was much effort in the planning and execution of projects, along with academic and pedagogical challenges that required a systematic approach.

The role of the teacher in project learning should be a friend, guide and working partner. The teacher must learn with the students and not pretend to know everything (Pattnaik et al, 2014) [9]. If Project Learning is well planned and successfully implemented, it has many benefits, some of which encourage cooperative activity; engage and sustain students; and develop scientific attitudes.

### **Project-Based Learning and Motivation**

Students learn best when they are involved and motivated on a subject that brings meaning to them, according to teachers. This is challenging even for the most qualified teachers to keep children actively involved and motivated in the classroom (Yates, 2012) [10]. According to Iadiapolo (2011) [11], when participating in a realistic setting for the

application and skills they were learning, students became involved and exercised more higher-order thinking skills (Iadiapolo, 2011). Almost all of the time students questioned teachers about the importance of what they are learning, or they get bored because they don't feel a connection to what they are learning. In addition, the ambition of students reduced when they have to memorize facts or formulas (Railsback, 2002) [12]. PBL developed and described the own experiences of students, learning styles, and stages of potential to what was presented in class. This method can help to keep students engaged in what they are learning and interact their learning experiences further with real-life situations. Projects were used to build relationships between classroom occurrences and real-life experiences; the questions and answers that occur in their daily lives are given value and are shown to be open to the systematic investigation (Blumenfield, 1991) [13]. PBL projects have introduced rules and are organized around a driving question. The mission of the students is to work for this aim of answering the driving question with an end product or problem solution in mind.

PBL uses technology that most students are fascinated to use in order to keep students' interest in focus (Boss & Krauss, 2008) [14]. Using computers to browse the web for internet-based project information is a factor in effecting change in school learning processes (ChanLin, 2008) [15]. Students involved in collaborative learning and group discussions arrive at their findings and solutions through the use of PBL. It was necessary to advocate for active communication among group members for seeking assistance, sharing resources, and encouraging each member in the group. Collaborative learning also encouraged improvement in motivation due to its high degree of independence in making a decision, designing a project and the ability to work closely with their classmates (Liu et al., 2004) [16]. Mostly, students are encouraged to work towards a set goal that gives them meaning. The main project like a learning tool improves the desire and interest of the students (Wright, 2012) [17]. According to Wright (2012), a presentation has produced a purpose and stirred excitement for students, Therefore, by working on projects, students who often find it difficult in most academic settings find meaning and explanation for learning (Nadelson, 2000) [18].

### **Purpose of the study**

The study aimed to investigate the impact of PBL on students' motivation.

### **Research Questions**

1. Is there any effect of project-based learning on students' motivation in Math?

## **METHODOLOGY**

### **Participants**

PBL and standard training groups were selected based on pre-determined classes. These classes were determined by the enrollment of students, as well as the administration and location of teachers. The PBL group consisted of 18 students, of whom 8 were female and 10 were male. The standard group of studies consisted of 17 students, of whom 9 were female and 8 were male. The age of students ranged from 16 to 18 years.

### **Lesson Design**

One of the goals of this study was to teach the same material in two different ways: using traditional lecture-based instructions with a standard group of training and project-based

teaching methods with a PBL group. These lessons should have been held during the same time period.

The standard group training lessons were conducted using the traditional approach. This included reviewing the previous day's homework, then presenting the new material and completing the homework with 20-30 tasks. The new material was presented using lecture instructions, which included examples of the problems that they would see in their homework and the formulas needed to solve these problems. The parts needed to calculate the area formulas were outlined, and the examples included forms that were oriented differently.

PBL group lessons were project- based and had specific tasks for each day to keep the PBL group abreast of the standard training group. Students from the PBL group solved the same typical tasks, but were trained completely differently than the standard group of studies. PBL is a multifaceted activity that includes observation; posing questions; studying books and other sources of information to see what is already known; investigation planning; analysis of what is already known in the light of experimental data; using tools to collect, analyze and interpret data; offer answers, explanations and predictions; and reporting results. PBL requires the identification of assumptions, the use of critical and logical thinking and the consideration of alternative explanations. PBL methods for learning are based on focused student research and encourage community-based learning through discussion and current practical tasks. These assignments helped students in their work to identify specific mathematical relationships and understanding. PBL lessons were taught in lightweight group work with the expectation that students would work with members of their group to develop methods for the area formulas. As an instructor, we closely followed the process of individual groups and demanded that all participants substantiate their methods. We have carefully developed lessons to allow students to move from a developed method for finding simple environments for formulating, to more complex problems that required using a developed method to search for area. The class gradually turned to more complex forms; students had to use previous studies to find areas of these forms. The lessons were designed to involve students in developing their own strategies for formulating areas that are consistent with the basic principles of constructivist learning.

At the end of each lesson, students were offered a task that needed to be taken home and completed using the newly developed method. These sets of problems were short (consisting of three to five tasks) and served only to consolidate the developed understanding.

### Lesson Progression

Area topics taught in this unit were taught in the order presented in Table 1.

**Table 1: Lesson Progression**

PBL group	Standard learning group
1. Area of parallelograms	Area and perimeter of rectangles, squares, and circles
2. Area of triangles	Area of triangles and parallelograms
3. Area of trapezoids	Area of trapezoids, rhombuses, and kites
4. Area of rhombuses and kites	Review of formulas covered so far

5. Perimeter and area of similar figures	Perimeter and area of similar figures
6. Circumference and arc-length	Circumference and arc-length
7. Areas of circles and sectors	Areas of circles and sectors

### Survey on motivation

Many factors influence learning achievement, they are intrinsic and extrinsic factors. Motivation is one of the inherent factors. Piaget believed motivation was the best way to maintain the achievement of the students. Motivation for students comes when they work to gain experience. Motivation works as a stimulating effort and accomplishment. The existence of good learning motivation will yield good results.

This study used the theory-based motivation questionnaire in mathematics learning. This survey consists of 16 statements on learning mathematics motivation developed from three main topics, such as follows: "use for activity," "want to result" and "want to overcome learning problems." It used a 5-degree Likert-type from "strongly agree" (1) to "strongly disagree" (5) for all statements.

Questionnaire motivation data are then processed in mathematics learning by searching for the mean for each point. Using the following table, this quantitative data was converted to qualitative data. Ratings of observed engagement were used as a motivation measure in the study.

**Table 7.** Conversion of quantitative data to quality data of 5 degrees Likert-Type

<i>Interval</i>	<i>Category</i>
$4.20 < x$	Very good
$3.40 < x < 4.20$	Good
$2.60 < x < 3.40$	Enough
$1.79 < x < 2.60$	Bad
$x < 1.79$	Very bad

**Table 8.** Pre-survey on students motivation of control group

<b>Statement</b>	<b>Mean</b>
1. The first time I study mathematics, I believe that this is will be easy for me.	4.02
2. At the beginning of mathematics lesson there is something that interests me	3.42
3. Mathematics subject are easier to understand	2.47
4. I were very satisfied to the result I get after completing homework/task/exam.	2.62
5. The relationship between Mathematics subject with my daily life is very clear.	1.95
6. Getting good results on Mathematics is very important.	4.09
7. As long I pursue Mathematics lessons, I believed that I could learn the contents.	2.45
8. The content of mathematics lessons fits perfectly with my interests.	1.86

9. There are things that stimulate my curiosity in learning Mathematics.	2.62
10. The tasks assigned by the teacher are too easy for me.	2.51
11. I am really enjoy to learn Mathematics.	2.38
12. I have learned something very interesting in Mathematics and unexpected before.	3.18
13. After studying Mathematics for a while, I am sure that I will pass the test/exam.	3.48
14. Mathematics learning fits with my needs because most of the contents are already I know.	1.98
	3.12
15. The content of Mathematics learning will be very useful for me.	1.87
16. All materials in Mathematics learning I have been fully understand	3.48
	1.98
	3.12
	1.87

**Table 9.** Pre-survey on students motivation of experimental group

Statement	Mean
1. The first time I study mathematics, I believe that this is will be easy for me.	4.12
2. At the beginning of mathematics lesson there is something that interests me	3.40
3. Mathematics subject are easier to understand	2.32
4. I were very satisfied to the result I get after completing homework/task/exam.	2.70
5. The relationship between Mathematics subject with my daily life is very clear.	1.86
6. Getting good results on Mathematics is very important.	4.11
7. As long I pursue Mathematics lessons, I believed that I could learn the contents.	2.43
8. The content of mathematics lessons fits perfectly with my interests.	1.90
9. There are things that stimulate my curiosity in learning Mathematics.	2.58
10. The tasks assigned by the teacher are too easy for me.	2.59
11. I am really enjoy to learn Mathematics.	2.25
12. I have learned something very interesting in Mathematics and unexpected before.	3.35
13. After studying Mathematics for a while, I am sure that I will pass the test/exam.	3.42
14. Mathematics learning fits with my needs because most of the contents are already I know.	1.85
	3.09
15. The content of Mathematics learning will be very useful for me.	1.91
16. All materials in Mathematics learning I have been fully understand	3.42
	1.85
	3.09
	1.91

In Table 13 and 14 are shown the results of pre-survey of control and experimental groups on students' motivation in learning mathematics. If we compare results of both group, we can say that there is no significant difference in two groups, where  $p=0.891(p>0.05)$ . Description of pre-survey on students' motivation for both groups is similar.

The first key point is "the necessity for students to do something about mathematics learning." It was displayed at 2, 5, 8, 9, 11, 12, and 14. The survey result showed students were interested in learning mathematics with a mean of 3.42 and 3.40. They had enough curiosity because of their interest in mathematics, with a mean of 2.67 and 2.58. The mean 3.18 and 3.35 shows that in mathematics, students had learned something interesting. They did not really enjoy learning math with a mean of 2.38 and 2.25. It was because the learning of mathematics did not fit their needs, with a mean of 1.98 and 1.85. To keep students interested in mathematics, indeed,

enough curiosity is not enough. Only at the beginning was their interest. The 1.86 and 1.90 mean, demonstrates that students did not like before interest in mathematics because their interest did not match the content perfectly. Students also had not seen the relationship with their daily life between mathematics, with a mean of 1.95 and 1.86.

The second key point is "the necessity for results after studying math." It was displayed at numbers 4, 6, 13, and 15. Students assumed it was important to get good mathematics learning achievement, with a mean of 4.11 and 4.09. It demonstrates the highest student response performance. Hence graduating from the national examination became one of students' purposes for learning mathematics, and students were confident that if they studied hard, they would pass the national examination with an average of 3.42 and 3.48. Besides the national examination results that were considered important, students also considered the mathematics learning content to be very useful to them, with a mean of 3.09 and 3.12. Not all students were actually satisfied with the results. Students were not satisfied with the result after learning mathematics with a mean of 2.70 and 2.62.

The third main point is "the necessity to overcome problems while studying math." It was displayed at numbers 3, 7, 10, and 16. Findings showed that students would easily study with a 4.02 and 4.12 mean when they first saw it. Nevertheless, with an outcome of 2.47 and 2.32 mean for mathematics difficulties, students assumed that the subject of comprehending mathematics was difficult. Also with these results, a mean of 2.51 and 2.59 shows that teachers still have quite difficult tasks / exercises for them. As an outcome, with an men of 1.87 and 1.91, most students still did not fully understand the mathematics material.

To achieve its one of main objective, current survey aims to answer following question: "Is there any effect of project based learning on students' motivation?" To obtain the answer to that question we compare the results of pre-survey and post-survey results.

**Table 10.** Post-survey on students motivation of control group

Statement	Mean
1. The first time I study mathematics, I believe that this is will be easy for me.	4.15
2. At the beginning of mathematics lesson there is something that interests me	3.35
3. Mathematics subject are easier to understand	2.38
4. I were very satisfied to the result I get after completing homework/task/exam.	2.89
5. The relationship between Mathematics subject with my daily life is very clear.	2.01
6. Getting good results on Mathematics is very important.	4.12
7. As long I pursue Mathematics lessons, I believed that I could learn the contents.	2.61
8. The content of mathematics lessons fits perfectly with my interests.	1.99
9. There are things that stimulate my curiosity in learning Mathematics.	2.62
10. The tasks assigned by the teacher are too easy for me.	2.42
11. I am really enjoy to learn Mathematics.	2.51
12. I have learned something very interesting in Mathematics and unexpected before.	3.05
13. After studying Mathematics for a while, I am sure that I will pass the test/exam.	3.38
14. Mathematics learning fits with my needs because most of the contents are already I know.	2.14
15. The content of Mathematics learning will be very useful for me.	3.25
16. All materials in Mathematics learning I have been fully understand	2.58
	2.14
	3.25
	2.58

Pre-survey and post-survey on motivation of control group's students has not a significant difference in results. By t-test  $p=0.551$  was calculated, where  $p$  is less than 0.05.

**Table 11.** Post-survey on students motivation of experimental group

Statement	Mean
1. The first time I study mathematics, I believe that this is will be easy for me.	4.25
2. At the beginning of mathematics lesson there is something that interests me	3.96
3. Mathematics subject are easier to understand	3.21
4. I were very satisfied to the result I get after completing homework/task/exam.	3.65
5. The relationship between Mathematics subject with my daily life is very clear.	2.72
6. Getting good results on Mathematics is very important.	3.85
7. As long I pursue Mathematics lessons, I believed that I could learn the contents.	3.02
8. The content of mathematics lessons fits perfectly with my interests.	2.56
9. There are things that stimulate my curiosity in learning Mathematics.	2.89
10. The tasks assigned by the teacher are too easy for me.	3.14
11. I am really enjoy to learn Mathematics.	3.42
12. I have learned something very interesting in Mathematics and unexpected before.	3.65
13. After studying Mathematics for a while, I am sure that I will pass the test/exam.	3.80
14. Mathematics learning fits with my needs because most of the contents are already I know.	2.52
15. The content of Mathematics learning will be very useful for me.	2.97
16. All materials in Mathematics learning I have been fully understand	3.58
	2.52
	2.97
	3.58

Pre-survey and post-survey on motivation of experimental groups' students has not a significant difference in results. By t-test  $p=0.551$  was calculated, where  $p$  is bigger than 0.05.

The first key point is "the necessity for students to do something about mathematics learning.", which displayed at 2, 5, 8, 9, 11, 12, and 14 questions. The pre-survey result showed students were interested in learning mathematics with a mean of 3.42 and on post-survey they show that their interest was increased by the mean of 3.96. They had a high curiosity because of their interest in mathematics, with a mean of 2.89. The 3.57 mean shows that something very interesting and unexpected had been learned by students in mathematics before. They starts really enjoyed learning math with a mean of 3.42.

The second key point is "the necessity for results after studying math." , which displayed at numbers 4, 6, 13, and 15 of questions. Students assumed it was important to get good mathematics learning achievement, with a mean of 3.85. It demonstrates the highest student response performance. Students also considered the mathematics learning content to be very useful to them, with a mean of 2.97. Students were satisfied with the result after learning mathematics with a mean of 3.65 that shows that they improve their achievement in math.

The third main point is "the necessity to overcome problems while studying math.", which displayed at numbers 3, 7, 10, and 16 of questions. Findings showed that students would easily study with a 4.25 mean when they first participate. Moreover, with outcome of 3.21 mean for mathematics difficulties, students assumed that the subject of comprehending mathematics was easier than before. Also with these results, a mean of 3.14 shows that tasks/exercises given by teachers become easier for them. With a mean of 3.38, most students starts to understand the mathematics material.

## CONCLUSION

The first question of research addressed the perceptions of the students towards project-based learning. The perceptions of the students towards project-based learning were very positive, according to the results. To examine the perceptions of students towards project-based learning, there were 10 items. Study results show that students learned more formulas through project-based learning compared to traditional learning methods (more than 70% of students responded strongly and agreed) and experienced an increase in learning motivations while at the same time adopting more positive attitudes towards learning.

Motivation of students is crucial in student-centered learning. Motivation is a fundamental strength for students to learn a language, according to Dörnyei (1988) . Motivation is usually a combination of student needs and goals in the theory of expectation-value (Eccles & Wigfield, 1995). Deckers (2005) also insists that the goal is to motivate the actions of the students to accomplish this. Thus, it is more relevant than ever to teach methods that strengthen student motivation.

The second question of research was the effects of project-based learning on the motivation of students in mathematics. The outcome of this study shows that the project had a major impact on the motivation of students to learn math. This is evident in the results, where the post-survey mean was much higher than the pre-survey mean ( $t(79) = -4.042, p = .000 < .5$ ). These results show that in the short term, trust and satisfaction are improved motivational factors.

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## STUDENT EMPOWERMENT AS A CORNERSTONE OF MODERN EDUCATION: METHODOLOGICAL INSIGHTS INTO THE TRAINING OF LITERARY TRANSLATORS

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### **Abstract**

Student empowerment is both the process and the result of endowing students with the authority to make decisions about their own education and that of their peers; to exercise their freedom as creative individuals, and ultimately – to find their own voice in the polyphony of a cooperative setting. The second half of the XXth century was marked by a move from teacher-centered explanatory instruction to interactive student-centered learning, whereas student empowerment has become one of the cornerstones of the new millennium. An empowered student is the main shareholder of the global community's future. Therefore, in order to gain a competitive advantage in the market of professional training the institutions of higher education have to incorporate interesting and useful courses into their curriculum that would serve the learner's needs in a conducive environment.

The paper highlights the experience of empowering Literary Translation majors at Taras Shevchenko National University of Kyiv, Ukraine. The discussion of the methodological insights is based on two interrelated courses: Literary Translation (Case Study 1), Translation Project Management (Case Study 2). Both courses offer reasonably minimized theoretical guidance to graduate students as well as provide for more informed and reflective practice in and out of the classroom. The first case study discusses an experiment conducted in line with the current reception-oriented trend in translatology that places high value on the subjectivity of the target readership response. The paper describes various methods of eliciting students' emotional and intellectual responses to a number of literary works in the original and in translation, which are used to build up the learners' confidence in their professional expertise, to boost their self-esteem and empathy. The second case study provides an example of an interdisciplinary blend of Project Management, Translation Theory, and Information Technologies that enrich the novice translators' portfolio of skills with those of effective time-managers, multi-taskers, team players, and team leaders.

**Key words:** student empowerment, education, curriculum, methodology, translation majors, Literary Translation, Translation Project Management.

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## THE ROLE OF CREATIVE TASKS IN THE FORMATION OF STUDENTS' INDEPENDENT ACTIVITY IN THE WORKSHOP SESSIONS

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### Abstract

Bloom's taxonomy for training purposes reflecting six levels of thinking skills from the simple to the complex, was based on analysis and synthesis processes. Later the taxonomy was revised by Anderson. These results were modified and the following six levels of learning skills were identified: remembering, understanding, applying, analyzing, evaluation and creation. Thus, has appeared the second version of the taxonomy of learning objectives. Distinguishing the "creation" level in the latest version proves that phenomena distinguished in the initial version of taxonomy, are already being considered as creative processes. As a result, the activation of imagination at the lesson turned into a necessity and active-interacting learning has occurred.

The application of active-interactive training is possible in the process of students' independent activities. Such approach turns the students' independent activity organization a to the technology of transmission of knowledge to a new generation.

In a literature the effectiveness of the organization of an independent activity is studied in the context of promotion of cognitive and creative qualities and is assessed as a set the students' independent activities. Here we consider the system of knowledge, abilities and skills acquired during the execution of the various tasks.

The research's purpose is to determine the optimal ways of formation at the students in the seminars an independent activity skills. The following hypothesis is put forward in the study: if the seminars in higher education institutions were constructed on the basis of creative tasks, students will develop the skills to operate independently.

The experiment been carried out with students of various faculties of teaching profession. To determine the level of formation of the independent student activity, at the beginning of the experiment have been established criteria and identified expert groups. The experiment was carried out in three stages: 1) the educational experience of teachers of different subjects were studied from the standpoint of organization of independent student activity; was analyzed the theoretical literature; have been developed methods including the path to a more optimal solution to the problem. At this stage experimental and control groups were determined; 2) the workshops were held in the experimental groups by the proposed new method, but in the control group by the old methods; 3) was realized the assessment of students on the basis of independent student activities criteria. Analysis of the results of the experiment showed that the construction of university seminars on creative tasks significantly affects the development of students' independent activities. Even independent learning activities expanding, begin to acquire a creative character. This relation proves the correctness of the hypothesis, set by experiment. Focusing of classes on creative tasks enabled the emergence of a new trend. The students' activity was increasing by giving them the opportunity to demonstrate their creativity, express their attitude to the problem. It became clear that workshops' focusing on creative tasks is more difficult in a groups with low level of dialogue culture. Therefore, during the workshops' focusing on creative tasks the level of students' dialogue culture should be taken into consideration.

**Keywords:** creative self-activity, creative tasks, taxonomy of learning objectives, skills, independent work, seminars and classes for individual work

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## ANALYSIS OF THE ICT-BASED ECOSYSTEM FACING THE CHALLENGES OF AN AGING POPULATION

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### Abstract

The objective of this paper is to analyze the ecosystem based on information and communication technologies (ICT) which is being built in order to face the challenges of an aging population mainly in terms of health and dependency. More specifically, it is a matter of providing answers to the following questions: who are the actors of this ecosystem and their role and what is the dynamics of the relations between them and the resulting performances? We will support our reflection on the concept of business ecosystem developed by Moore (1993), with reference to the biological ecosystem of Tansley (1935), then enriched by numerous researchers (Gueguen and Torrès, 2004 ; Gueguen et al., 2004 ; Mira-Bonnardel et al., 2012 ; Moore, 1996, 1998 ; Parize-Suffrin, 2012 ; Pierce, 2009 ; Teece, 2007 ; Teece et al., 1997 ; Torrès, 2001 ; etc.). It appears that the issue of an aging population considered from the point of view of ICT brings together a set of heterogeneous actors not only private but also public and from the third sector: large ICT companies, start-ups, private equity investors, city doctors, hospitals, residential care facilities for the elderly, the insurance sector... These actors are not isolated entities, they are interconnected and rely on each other to deploy their strategies and implement their actions, which results in a co-evolution of their capacities. The ecosystem thus constituted is an open network, new entrants are numerous but in the phase of recomposition and future concentration to face the challenges of their development. Start-ups producers of new offers in applications and equipments (connected objects, telehealth, teleassistance...) aim to promote the « aging well » (healthy life expectancy, home support, autonomy, safety, quality of life, social ties...). Next to them are the digital giants (Google, Apple, etc.) already strongly involved in the field of e-health. ICT is thus at the heart of a process of multidimensional value creation – economic, human, social... – in the context of an aging population.

**Keywords:** aging population, ICT, ecosystem, health, dependency.

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## FAMILY SUPPORT IN THE REPUBLIC OF NORTH MACEDONIA

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### Abstract

Ensuring children's rights and family well-being is a priority of every European country. The Republic of North Macedonia, as a candidate country of the European Union, shares the same family values and family policies as the remaining EU member states. However, despite the past governmental efforts in the area of legal harmonization, there are several gaps that have to be fulfilled and policies to be improved in order to achieve efficient institution at the European level.

In order to expand existing policies regarding family support, we consider crucial the analysis of the factual situation in the country, as a basic step towards further research. Therefore, the aim of this paper is to map governmental and non-governmental institutions in the Republic of North Macedonia which are responsible to provide family, children and parents' support. By doing so, we can develop additionally omitted family policies or improve existing ones. Finally, the paper will present a list of competences of the employees of family support institutions in order to evaluate more peculiarly their staff's skills standards.

**Key-words:** family support, family policies, institutions, skills standards, North Macedonia.

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## IMPACT OF EMOTIONAL EXPERIENCE OF DISEASE ON THE DIMENSIONS OF QUALITY OF LIFE IN PATIENTS WITH TRANSVERSE MYELITIS

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### Abstract

**Methodology: Aims of the research:** The purpose of this paper is to determine the impact of psychological experience of disease on dimensions of quality of life in patients with Transverse Myelitis. **Participants:** In this prospective, observational, comparative, randomized (random selection) and clinical study 60 patients were analyzed. There were 2 males and 58 females, aged from 20 to 70 years. All patients are diagnosed with transverse myelitis. **Instruments of research:** For assessment of emotional experience was used The Depression, Anxiety and Stress Scale - 21 Items (DASS-21) is a set of three self-report scales designed to measure the emotional states of depression, anxiety and stress and The WHOQOL-BREF was used to determine the dimensions of quality of life. **Results:** Results of our study have shown that the mean score of emotional experience in our patients with transverse myelitis where: (stress M=9,42), (depression M=8.63) and (anxiety M= 7.90). There were significant negative correlations between level of stress and physical health ( $r = -.259$ ,  $p < .005$ ), stress and psychological ( $r = -.492$ ,  $p < .001$ ), stress and social relationship ( $r = -.465$ ,  $p < .001$ ) stress and environment ( $r = -.3337$ ,  $p < .001$ ); There were significant negative correlations between level of depression and physical health ( $r = -.366$ ,  $p < .001$ ), depression and psychological ( $r = -.680$ ,  $p < .001$ ), depression and social relationship ( $r = -.614$ ,  $p < .001$ ) depression and environment ( $r = -.530$ ,  $p < .001$ ); There were significant negative correlations between level of anxiety and physical health ( $r = -.361$ ,  $p < .001$ ), anxiety and psychological ( $r = -.449$ ,  $p < .001$ ), anxiety and social relationship ( $r = -.403$ ,  $p < .001$ ) anxiety and environment ( $r = -.452$ ,  $p < .001$ ). **Conclusion:** The emotional experience associated with levels of stress, anxiety and depression in patients with myelitis results in statistically significant effects on all dimensions of these patients' quality of life.

**Key words:** emotional experience, stress, depression and anxiety.

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**“VENGEANCE OF JENNY’S CASE”<sup>1</sup>:**

**D. G. ROSSETTI NAMING THE PROSTITUTE**

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**Abstract**

The weakest, most broken and demoralised of society were deemed ‘The Great Social Evil’: the hapless prostitute, historically criminalized and shunned, was ruthlessly disaffiliated through Victorian hypocrisy and hysteria. With unrivalled belligerence, the ‘fallen woman’ is diminished and estranged to a sub-species, and treated as barely human. Patriarchal capitalism as the causative invariable in prostitution, intensified during nineteenth-century industrialisation, when the capitalist mindset determined to generate social and economic stability at whatever human cost. Subsequently there developed a social environment that was autocratic, intolerant and singularly manipulative of the individual across the board. An artificial moral binary was generated to repel all strains contrary to the patriarchal status quo: all diversity was held to be counter to the stipulated norm and perceived as subversive and castigated. The female ‘Other’ was mercilessly categorised and allotted identity conditional to fulfilment of designated sexual role. The prostitute was the female ‘uncontained’, the dangerous transgressor and therefore a threat, if only in principle, to patriarchal ideology. Victorian defence of the prostitute though not absent, existed in a vacuum devoid of social culpability, so that the causative influences of poverty, the drive of masculine appetite and oppression went largely unaddressed as prejudicial to the establishment. This paper will consider the issue of the prostitute as revealed within the confines of the Pre-Raphaelite painter/poet, Dante Gabriel Rossetti’s lyrical poem *Jenny* (1870). While the oddly fluctuating reception of the prostitute as both *perpetrator* and *innocent victim* complicates the argument, an unexpected elevation of the ‘whore’ to equality with the Victorian lady, will be shown to reveal a troubled substructure of masculine fragmentation. While the commodification of female sexuality necessarily urges a Marxist-Feminist reading, an additional New Historicist approach will also be deployed in order to explain the incongruity of opposing sentiments in the representation of the prostitute.

**Key words:** Binary Opposition, Dante Gabriel Rossetti, Nineteenth-century Poetry, Pre-Raphaelite, Prostitute, Victorian

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<sup>1</sup> The poem’s epigraph alludes to Shakespeare’s *Merry Wives of Windsor* (1597): a schoolboy reciting declension of the genitive case plural in Latin “horum harum horum” is misunderstood by Mistress Quickly as rudely repeating the word ‘whore’, giving rise to her agitated reprimand: “Vengeance of Jenny’s case! Fie on her! Never name her child.” William Shakespeare *The Merry Wives of Windsor*, ed. Giorgio Melchion, (Thomas Nelson and Sons Ltd., Arden Shakespeare, 2000) p. 242, Act.4, Sc.1, ln.54-55.



For all our supposed liberalism, attitudes towards the prostitute have barely changed, still statistically the most socially and economically challenged of women, she continues to be the offender, rather than the victim.<sup>2</sup> Even though contemporary culture abounds with degrading advertising that sexualises women for the singular purpose of profit, and the media invariably endorses women as sexual commodity, it is the prostitute who continues to be sanctimoniously shamed as a criminal merchant of sex. A recent incident saw a serious charitable enterprise in support of the prostitute, therefore invariably battling prejudice, being made the butt of a crass joke. The Royal couple<sup>3</sup>, invited to publicize and raise awareness, were asked to help with the prepping of food parcels for these women. The result of this ‘photo opportunity’ unfortunately proved prejudicial to the prostitutes and counter-productive to their cause, when bananas were jokingly embellished with glib phrases such as “you are loved”, thereby transforming an innocuous object into a mocking phallic innuendo.<sup>4</sup> Crass insensitivity at the expense of any other vulnerable group would be severely reprimanded, but not it seems the prostitute. The hypocrisy is as ancient as prostitution itself; as Carole Pateman admits in *The Sexual Contract*, “...an unqualified defence of prostitution has been hard to find.”<sup>5</sup> Yet a startling moment of revelation exists, the briefest sound bite from the annals of Victoriana, when the misogynistic binary of women into *good* and *bad*, is unexpectedly challenged.

As ubiquitous social pariah, the prostitute is plunged to new fathoms of social demerit by the Victorians, who diminish and demonize her to a sub-species barely human. Patriarchal capitalism as the causative invariable in prostitution,<sup>6</sup> intensified during industrialisation, when the capitalist mindset determined to generate social and economic stability at whatever human cost. Subsequently there developed a social environment that was autocratic, intolerant and singularly manipulative of the individual across the board. An artificial moral binary was generated to repel all strains contrary to the patriarchal status quo: all diversity was held to be counter to the stipulated norm, perceived as subversive and mercilessly castigated. The female ‘Other’ was compartmentalised and allotted identity conditional to sexual role. The prostitute was the female ‘uncontained’, the dangerous transgressor and therefore a threat, if only in principle, to patriarchal ideology. Victorian defence of the prostitute though not absent, existed in a vacuum devoid of social culpability, so that the causative influences of poverty, the drive

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<sup>2</sup> Revenue seems overwhelming incentive for the establishment since it maintain a sector it conversely criminalizes: the approximate million prostitutes active in the US, for example, generate financial turnover of over 40 million dollars a day. The Average age of entry into prostitution is 14 with 50% being teenage run-aways; educational level is no higher than high school drop-out; there is wide-spread proneness to sickness, poverty and alcohol/drug abuse; with 90% having experienced childhood sexual abuse: these percentages may refer to contemporary prostitution, but the basic causative factors of disadvantage and abuse remains timeless and universal.

Katie Beran, “Revisiting the Prostitution Debate: Uniting Liberal and Radical Feminism in Pursuit of Policy Reform”, *Law & Inequality*. 19 (2012), p.20, <http://scholarship.law.umn.edu/lawineq/vol130/iss1/2>.

<sup>3</sup> Visit of the Duke and Duchess of Sussex (Prince Harry and Meghan Markle) on February 1<sup>st</sup> 2019 to charity One25 in Bristol.

<sup>4</sup> Express.co.uk, by Laura O’Callaghan, Feb. 5, 2019 <https://www.express.co.uk/news/royal/1082773/meghan-markle-news-bananas-piers-morgan-pictures-bristol-visit>

<sup>5</sup> Carole Pateman, *The Sexual Contract*. (Cambridge: Polity Press, 1988) 190.

<sup>6</sup> Pateman, *The Sexual Contract*, 189.

of masculine appetite and oppression went largely unaddressed as prejudicial to the establishment. While the commoditizing of female sexuality necessarily urges a Marxist-Feminist reading, an additional New Historicist approach will also be deployed in order to explain the incongruity of opposing sentiments in the representation of the prostitute.

Dante Gabriel Rossetti (1828-1882), the nineteenth-century painter/poet and founding member of the Pre-Raphaelite Brotherhood, is a man torn between conflicting social identities: an upper middle-class Catholic background fixed in the clutches of a formidable evangelical mother, countered by the intuitive life of the rebellious bohemian artist. Curiously in accord with this duality, Rossetti expressed himself via diametrically opposed mediums -the sister arts of text and visual image. His mode of expression being a ‘balancing tension’ between text and image: often to mitigate indiscreet candidness in one medium through the involvement of the other. Binary opposition as methodology is a leitmotif extending both Rossetti’s life and the Victorian moral premise.

In 1870 Rossetti published *Jenny*, an extended first person lyric poem of 34 stanzas. Its date redolent of late-Victorian irreverence, its first two lines immediately subversive: “Lazy laughing languid Jenny, / Fond of a kiss and fond of a guinea”.<sup>7</sup> The attribute of unconcerned indolence and an urge for sex and money at once segregate and condemn Jenny, since both qualities contradict the prescribed concept of woman. The narrative is a daring account of a young scholar’s fascinated, but entirely chaste night with an equally young prostitute named Jenny. Victorian sensibility had long since vilified the prostitute into a female grotesque, when in reality they were “solitary figures in the urban landscape... emblematic of urban alienation and the dehumanization of the cash nexus.”<sup>8</sup> Though her profession is conspicuous, Jenny is so devised as to barely register as the “degraded and threatening”<sup>9</sup> Victorian stereotype. His description of her is not disgusted or morally outraged, as the Victorian precept would stipulate; but neither is he willing to excuse her by reason of poverty. Instead he refers to a blameful ‘fondness’, in other words, a natural preference for sex and monetary gain. The poem’s subversive intent is constantly counter-balanced by a strategic sub-textual righteousness, such as this deformation of Jenny’s character. Not to maintain propriety, since the poem is by no means void of the sensual and the tantalizing; rather to obscure economic and moral liability by society. The ‘world’s oldest profession’ is the “world’s oldest excuse”, states Katie Beran: prostitution is not a profession, but an age-old consequence of an unequal power structure:<sup>10</sup> The cliché legitimises the exchange of sex for money as an ‘inevitable’ and ‘unchangeable’ means of labour for the most disadvantaged women in the labour market; it diminishes human degradation to simple ‘supply and demand’, and demeans the women as habitually depraved.

A diametric *defence* and *denouncement* of the prostitute was not uncommon in the Victorian period. The nineteenth-century novel became a subversive vehicle for the representation of the autonomous woman, but the conservative sensibilities of its middle-class readership had to be satisfied. When the Victorian writer strove to represent, let alone champion the prostitute, he risked much more than criticism of his work; he risked being personally besmirched through the association, as though contaminated by infectious disease. Following the Cholera epidemics of 1831 and 1849 sanitary reformers, “using fear to promote their cause... identified the prostitute literally and figuratively as the conduit of infection to

<sup>7</sup> Dante Gabriel Rossetti, *Dante Gabriel Rossetti: Poems*, ed. Oswald Doughty, (London: J.M. Dents & Sons Ltd., 1957) 63.

<sup>8</sup> Judith R. Walkowitz, *City of Dreadful Delight: Narratives of Sexual Danger in Late-Victorian London*, (London: Virago Press Ltd., 1992), 22.

<sup>9</sup> *Ibid.*, 21.

<sup>10</sup> Beran “Revisiting the Prostitution Debate”

respectable society – a “plague spot, pestilence, a sore.”<sup>11</sup> Even Jenny, in the first bloom of youth, cannot escape having a “...desecrated mind, / Where all contagious currents meet.”<sup>12</sup> Judith Walkowitz pertinently refers to Dickens’ *David Copperfield* (1849-50) where the prostitute Martha, while contemplating suicide on the banks of the River Thames, looking out onto the “blighting influence” of the “polluting stream”, so that David, the child protagonist, mentally associates Martha with the rubbish and decaying matter.

The poem’s epigraph from Shakespeare’s *Merry Wives of Windsor* (1597) is an angry reproach by one under a misapprehension that a woman, Jenny, has been falsely accused of being a prostitute: “Vengeance of Jenny’s case! Fie on her! Never name her child!”<sup>13</sup> So that the poem’s inception is that Jenny, the prostitute is maligned and misrepresented. Contrary to the expressed warning – “Never name her child!” Rossetti does indeed name Jenny, and in so doing establishes her within the body politic. However, at no point does is Jenny absolved of adultery; her sin is constant and she is perceived as unalterably corrupted in accord with every teaching poet has ever received. He is willing, if urged by sympathy, to exonerate her character – but her body is indefensibly debased. As contemporary expression has it, he does not believe her to be intrinsically bad, but someone who has done a bad thing. This is reflected in the way she is described, which is similar in imagery to the iconic, but carefully debased all the same. Jenny blushes when kissed and is made “much daintier”<sup>14</sup> suggesting a guilty conscience, and that something of innocence lingers, though mortified: as poet Elizabeth Barrett Browning puts it: “Girls blush, sometimes...to save the shame.”<sup>15</sup> The freshness innate to Jenny’s eyes that “are as blue skies” is contradicted to a degree by her hair (- ubiquitous symbol of female sexuality), that is yellow like gold. While blue typifies the ‘true blue’ unblemished country girl, her fairness, is not “yellow like ripe corn”<sup>16</sup>, signifying fertility and wholesomeness, but the gold of iniquitous earnings and “...worse poison to men’s souls.”<sup>17</sup> The following line is a similarly diametric repetition: “Fresh flower, scarce touched with signs that tell / Of Love’s exuberant hotbed”: meaning Jenny’s body has partaken of carnal lust, yet her spirit is untouched and maintaining its innocence bloom. But the suggestion that the noxious “hotbed” of prostitution can be associated with “Love” seems delusional. To understand this misnomer we need to consider the psychological drive of the poet himself; he was a regular patron of prostitutes and as such may have been sparing his own feelings of self-worth.

Rossetti’s concept of women was complicated: naturally beguiled by the sensual and erotic, he was nevertheless guilt-bound to the catholic and maternal, and deeply indoctrinated to the romanticized female ideal. Attributes of femininity featured intensely in his art: not of a feminist mindset, he fostered a fascinated affinity that saw him envisage his creative self, his soul as artist, through personification of the feminine. In Elizabeth Siddal, initially his model, later his wife, his idealism found a blank canvas. The relationship was not to endure however, when a stillbirth followed by clinical depression was eventually succeeded by Laudanum addiction and suicide. Painfully seeing in his wife the loss of the romantic ideal, a disillusioned

<sup>11</sup> Walkowitz, *City of Dreadful Delight*, 22.

<sup>12</sup> *Rossetti: Poems*. 67, ln. 164-5.

<sup>13</sup> William Shakespeare *The Merry Wives of Windsor*, ed. Giorgio Melchion, (Thomas Nelson and Sons Ltd., Arden Shakespeare, 2000) p. 242, Act.4, Sc.1, ln.54-55.

<sup>14</sup> *Rossetti: Poems*, 67, ln.9.

<sup>15</sup> Elizabeth Barrett Browning, *Aurora Leigh*, (Ohio University Press, 1992), 237, ln.692-93.

<sup>16</sup> The Blessed Damozel. “Her hair that lay along her back / Was yellow like ripe corn.”

*Rossetti: Poems*, 63, ln. 11-12.

<sup>17</sup> William Shakespeare *Romeo and Juliet*, ed. T.J.B. Spenser, (Penguin, 1974) p. 155, Act.5, Sc.1, ln.80

Rossetti sought solace in the many prostitutes he used as models. It seems quite natural that these women came to be known by him not merely as so much flesh to be paid by the hour, but as friends and confidantes, whom he appreciated, and possibly whose taint he identified with on some level. Yet even in this intimate context he was unable to overcome inbred probity and while appreciated as strong individuals, they remained unforgivably damaged goods. This proximity allows him to acknowledge the brutality to which the prostitute was subject, so that Jenny as “Poor flower left torn since yesterday” is candidly portrayed as victim: “But most from the hatefulness of man / Who spares not to end that he first began, / Whose acts are ill and his speech ill, / Who, having used you at his will, Thrusts you aside...”<sup>18</sup> Jenny’s culpability lessens when blame transfers from her to society at large: “Poor handful of bright spring-water / Flung in the whirlpool’s shrieking face / Poor shameful Jenny, full of Grace..”<sup>19</sup> The attribute of innate innocence rendered by the baptismal metaphor of spring water absolves Jenny of complicity, especially since she is tossed into the maelstrom of capitalist endeavour. Yet mollifying tension instantly asserts the disunity of body and soul and undermines the subversive agenda: the antithesis of *shameful* and *God’s grace*, respectively, Fragmentation of identity is not conducive to normative connection with society; especially since the prostitute is already peripheral to society interacting in a commercial no-man’s-land. In other words, what began on the premise of being a defence of the prostitute recoils to become an argument reinforcing alienation and separatism.

Rossetti’s intractable personal dilemma is possibly not just idiosyncratic but epitomizes a patriarchal neurosis. The student narrator although young and painfully inexperienced and insinuating scholarly enlightenment and tolerance, is nevertheless a fledgling patriarch already imbued with prejudice, no doubt indicative of the deeply ingrained nature of social indoctrination. The young man’s description is not an understanding of Jenny the person, but an illustration of his prototypical perspective: “Why, Jenny, as I watch you there,- / For all your wealth of loosened hair, / Your silk ungirdled and unlac’d / And warm sweets open to the waist, / All golden in the lamplight’s gleam.”<sup>20</sup> Even in a tract delivering a vindication, the male gaze is self-important and invariably controlling and re-constructing; rendering Jenny the object, and not the subject of this account. Devoid of opinion, Jenny is decorous and rendered dumb (in every meaning of the word), in a monologue where the male absolves his own involvement in the illicit by deeming to ‘explain’ or indeed to ‘explain away’ the prostitute. Jenny is indicted for enticing with erotic wiles; she is the source of iniquity, she is the active principle. Yet, like a Freudian slip the narrative betrays itself, and Jenny, we realize, has been constantly described as inactive throughout the poem: almost exclusively unconscious by being drunk and dozing for the entire monologue. The text is self-aware and deeply troubled by what the male-gaze inflicts, asking “What has man done here? How atone,” though God is invoked, it is women who are called upon to awaken to the issue: “If but a woman’s heart might see / Such erring heart unerringly / For once! But that can never be.” Is she incapable or disallowed comprehension, we are left none the wiser

The Victorian prostitute was a necessity that the middle-classes dare not own up to because “what is socially peripheral is so frequently symbolically central.”<sup>21</sup> The rise of prostitution in London to 80.000 by mid-century<sup>22</sup> signifies that it was not merely a leisure

<sup>18</sup> *Rossetti: Poems*. 65, ln.84-88.

<sup>19</sup> *Ibid.*, 63, ln.16-18.

<sup>20</sup> *Ibid.*, 64. ln. 50-4.

<sup>21</sup> Walkowitz, *City of Dreadful Delight*, 21.

<sup>22</sup> Michael Mason, *The Making of Victorian Sexuality*, (Oxford University Press, 1995), 80.

activity, but far more central to the patriarchal power balance than one would think. Rossetti, typifying the dilemma, found it impossible to correlate the romanticized image of the ‘Victorian lady’ with the idiosyncrasies of women as individuals. All fleshly realities, sexuality in particular, were visceral issue that could not coexist within the constructed ideal: endorsed by the church, medicine and the bourgeoisie, the ‘Victorian lady’ was unanimously declared naturally disinterested in sex and so substituted, by the necessary evil, the prostitute who “was the embodiment of the corporeal smells and animal passions that the rational bourgeois male had repudiated and that the virtuous woman, the spiritualized “angel in the house”, had suppressed..<sup>23</sup>

The middle-class lady, designedly ignorant in the ways of the bedroom, would comply to maintain class credentials and portray a mien of respectability by being seen to tolerate sexual union. Meanwhile her husband, no less indoctrinated, would duly acquiesce. Clearly like the prostitute, the Victorian male too was fragmented, seeking love in one relationship and sexual satisfaction in another. A modern day prostitute explains that “[a]ll men make out that women’s sexuality is dirty, but deep down it’s their own that they can’t stand. So they blame women. We take it for all women, for all the others.”<sup>24</sup> The moral binary that segregated women was clearly not a feminine issue, but related to the insecurities of masculine identity. The patriarchy falling foul of a segregating binary intended to objectivise and suppress the female.

The binary divide between *wife* and *prostitute*, *good* and *bad*, is suddenly challenged by the poem. Beginning in stanza 8 with repetition of the white lily, symbolising Mary’s purity and proximity to the divine: “Ah! lazy lily hand more bless’d / If ne’er in rings it had been dress’d / Nor ever by a glove conceal’d!”<sup>25</sup> Beneath the gaud and trimmings of the whore, the text maintains, resides the sacred. In the following stanza reference to lily links Jenny to Christ through his Sermon on the Mount: “Behold the lilies of the field, / They toil not neither do they spin.”<sup>26</sup> Disregarding the trappings of the worldly is justifiably mocked in regard to Jenny’s lot. The monetary incentive becomes an imperative, perhaps the only point at which the necessity is acknowledged. The final repetition of lily has the sacred symbol being obliterated, but not without a rhetorical question to Jenny, sceptical of complete degeneration: “The lilies sickened unto death. / What, Jenny, are your lilies dead?”<sup>27</sup> It is in stanza 14 that this outlandish and repetitive association with the sacred abruptly leads to the unanticipated correlation between Jenny and Elizabeth Siddal. While it is untenable that Rossetti should dare to parallel Jenny with any ‘respectable’ middle-class woman at all, that he should do so with the venerated

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The Victorian statistics make more sense with comparison to contemporary figures: The numbers of prostitutes to the population of Victorian (19<sup>th</sup> Century) London was 80.000/1 million, while in contemporary figures (2018) it is 32.000/8.97 million. To clarify further, while prostitutes constitute 0.36% of London’s population today, with two charitable organisations that provide welfare for the prostitute (‘Door of Hope’ and ‘Beyond the Street’); in Victorian London the numbers of prostitutes were 8% of the population, also with two charities (‘The Westminster Female Refuge’ and ‘Magdalen Hospital’). It should be noted that Victorian London boasted over 1200 charities and Benevolent Societies, with only these named two dedicated to ease the suffering of over 8% of the population. (<https://www.victorianlondon.org/dickens/dickens-charities.htm>)

<sup>23</sup> Walkowitz, *City of Dreadful Delight*, 11.

<sup>24</sup> Annette Scambler and Graham Scambler, *Rethinking Prostitution: Purchasing Sex in the 1990’s*, (London: Routledge, Edition 1, 1996) 5.

<sup>25</sup> *Rossetti: Poems*, 65, ln.98-100.

<sup>26</sup> Matthew 6:25-35

<sup>27</sup> *Rossetti: Poems*, 65, Ln.111-112.

memory of his deceased wife, seems inconceivable. The oddly fluctuating representation of the prostitute as both *perpetrator* and *innocent victim* is clearly connected to this unexpected elevation of the ‘whore’ to equality with the Victorian lady, and reiterates a troubled substructure of masculine fragmentation.

The slumbering Jenny is likened to the reassuring image of Elizabeth ‘asleep’ in her grave: “Just as another woman sleeps!”<sup>28</sup> Clearly a certain voyeuristic dominance is not absent from his perusal of the vulnerable sleeping woman, neither is a stipulation of unworldly innocence. But that stark evincing, “Just as another woman sleeps!” alludes with self-reproach to a co-existent visual narrative entitled *Beata Beatrix* (1864-1870), taken from Dante Alighieri's poem *La Vita Nuova*, depicting Beatrice Portinari at the moment of her death. Rossetti had feverishly painted several versions, each devotedly bearing the delicate face of Elizabeth Siddal in a “sudden spiritual transfiguration”.<sup>29</sup> However, the comparison is all the more poignant since the tragic death of Elizabeth Siddal in 1862, had left Rossetti morose and guilt ridden: he was deeply contrite that in shunning his frail and invalided wife, in seeking to escape the indelicate confines of the sickbed, he had retreated to writing poetry rather than comfort her. Needing to atone for having forsaken her he decided that it would be a fitting tribute and a mark of his remorse if he were to place his hitherto unpublished manuscript of poems in her coffin. It was 6 years later in 1868 that sufficiently recovered Rossetti sought to retrieve his manuscript. The coffin was dug up and from among Elizabeth’s still tangibly red hair the volume was retrieved. The poem he was most eager to have in his possession was *Jenny*, which in spite of a “great worm-hole right through every page”<sup>30</sup> was subsequently retrieved and re-worked by him.

The sight of the blissfully sleeping Jenny excites the student to a moment of revelation, when suddenly in stanza 15 he is stunned by the sheer depravity that has suggested itself to him: “Enough to throw one’s thoughts in heaps / Of doubt and horror,—what to say / Or think,—this awful secret sway.” Come to mind is the speculation that these diametrically opposed women (the prostitute and the venerated wife) may be created equal and therefore one, in the eyes of God: “The potter’s power over the clay! / Of the same lump (it has been said) / For honour and dishonour made, / Two sister vessels. Here is one.”<sup>31</sup> Hardly a revelation, one would think, given that the equality of souls in the sight of God is a central stipulation of the bible; however, since this basic premise is being applied to the prostitute, it is a revelation indeed! The following stanza introduces the young man’s cousin Nell, who is youthful, flirty and naive –rather like Jenny. But unlike Jenny she is protected by family and a secure environment. Jenny is favourably defined as someone who has been let down by her community and not because of an innate flaw of character or spirit. With a spirited insistence the poem demands that this epiphany be fixed in the readers mind and so the lines denoting equality are forcefully repeated.

Binary opposition is central to Rossetti’s very existence: he is painter and poet; catholic, middle-class patriarch and bohemian artist; his love life and images vie between the ethereal

<sup>28</sup> *Ibid.*, 67, ln. 180.

<sup>29</sup> William E. Fredeman, ed., *The Correspondence of Dante Gabriel Rossetti: Last Decade 1873-1882 Kelmscott to Birchington Vol. 6, 1873-1874*, (Cambridge: D.S. Brewer, 2006), 89.

<sup>30</sup> Yıldız Kılıç, “*My World My Work My Woman All My Own: Reading Dante Gabriel Rossetti in his Visual and Textual Narratives*,” (Bloomington: Authorhouse, 2014) 240.

<sup>31</sup> *Rossetti: Poems*, 67, ln.177-184.

princess and bovine, world-weary prostitutes; he is fragmented in self and disunited from society, and so on. The Victorian world-order has been constructed with binary opposition as ideological methodology, it is not based on reality or truth but the concept that any given variable or idea that transgresses the established doctrine is to be negated. The stipulation is simple: the status quo determines imperatives/social codes and anything that contradicts them is heresy. Certainly the artificial construct of misogynistic binary that alienates the prostitute is determined and subverted in *Jenny*. Is the prostitute then liberated, or understood; is she determined as an individual? Frankly no! The poem, as a defensive and redemptive narrative is less about the prostitute than it is about recognising patriarchal means of control. Rossetti, in isolating Jenny as social victim, in essence isolates himself as such.

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