ROZPRAWY NAUKOWE

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MEVLANA'S CONCEPTION OF HUMAN BEING AND SOCIETY, AND ITS RELEVANCE FOR SOCIAL WORK

Key words: anthropological and social contexts of social work, the Value and Honor of Human Being, Social Order, Ideal Society, the conception of man and society, universal values of humanity, the Mevlana's thought, the values and subjectivity of the client, the Islamic theologian Rumi Mevlana.

Introduction

"Come again, please, come again,
Whoever you are.
Religious, infidel, heretic or pagan.
Even if you promised a hundred times
And a hundred times you broke your promise,
This door is not the door of hopelessness and frustration.
This door is open for everybody.
Come, come as you are."

Mevlana Jalaladdin Rumi

For the last two decades the profession of social work has been challenged on its reliance on Eurocentric paradigms. The profession has been criticized due to its inability to cope with diversity and even being an agent of "colonization." Social work's preference for modernist and Eurocentric paradigms through "professional imperialism" replaced the tremendous diversity of traditional models and understandings of social care (Midgley, 1981; Al-Krenawi and Graham, 2001; Coates et al., 2005; Keefe, 2003; Canda and Furman, 1999; Koenig, McCullough and Larson, 2001). Therefore, social work must engage in ongoing critical reflection about its current values and actions (Besthorn, 2002; Cox, 2001; Fisher and King, 1994; Leonard, 1997; Specht and Courtney, 1994). The profession is also in a position to begin a professional dialogue to find ways of honoring long held traditions sugge-

sting, in profoundly metaphysical ways, that earth and spirit are inherently interconnected (Besthorn, 2002).

The new terminology in critical approaches to social work practice emphasizes cultural frame of reference, culturally appropriate interventions, and self-reflection and sensitivity to one's own biases. In this sense, the profession needs to focus more on diverse traditions of understanding self and interaction originated in non-Western world. Therefore, Mevlana's understanding of human being opens the door for a more pluralist and humane practice.

Spirituality provides an interpretive framework for understanding reality that informs them of who they are and how they should live (Maslow, 1968). Spirituality can be viewed as ontologically driven, striving for union or relation with God, or ultimate transcendent reality, therefore it needs to be understood without any direct link with religion which can be understood to be the external expression of faith that unites an individual with a moral community (Hodge, 2004; Joseph, 1988; Stanard, Sandhu and Painter, 2000).

What makes spirituality acquire a central place in social work intervention is also the demand from the clients who desire to have their spiritual beliefs and values integrated into counseling settings (Hodge, 2004; Arnold, Avants, Margolin and Marcotte, 2002; Larimore, Parker and Crowther, 2002; Privette, Quackenbos and Bundrick, 1994). Hodge also argues that (2008), although the profession of social work has traditionally been based on the values of enlightenment, many clients today demand their spiritual inclinations and inspirations integrated into intervention.

This shows that there is growing realization that for many clients spirituality is fundamental to their existence (Hodge, 2002). Graham and Al-Krenawi (1996), in particular, point out the similarities between social work's philanthropic heritage in the West and contemporary traditional healers outside western societies.

Getting rid of the binary oppositions in the world (such as the ones between the social worker and the client, the helper and the one in need, etc.), Mevlana offers a cosmological challenge. His comprehension of self reflects both diversity and oneness, but not oppositions. Being a reflection of God in the world, and comprising all the qualities of him, human being is both the cause and end of all happenings. In this sense, the social worker and the client constitute the faces of one existence. This necessarily brings about a self-reflective practice.

Mevlana, a Universal Thinker

Mevlana Jalaladdin Rumi was born as the twelfth century newly begins. Mevlana was born in Balkh in North Afghanistan into a family well known by its Islamic scholars and Sufis. His first teacher was his father Bahaeddin Walad who was a famous philosopher of Islam (*kalam*) scholar and known as 'king of scholars'.

When the Mongols invaded Central Asia between 1215 and 1220, his father set out towards the West and migrated to several places of rich intellectual background in the Middle East, and finally settled in Konya, capital city of the Anatolian Saljuks. There Mevlana reached a very high level in Islamic law (*fiqh*) and *kalam.* He had been interested in "secular" and juridical sciences until his father's death, and then he joined to Sufi order and deepened his knowledge on this field (Onder, 1990,p. 1-2). This was a break from "reason" in favor of "heart" and initiation.

The next part of the paper discusses Mevlana's views on the value and honor of human being, the perfect man, social order/ideal society, and social problems. These topics are apparently not sufficient to examine all of his philosophy, but for the purposes of this paper, they are supposed to represent the main points of it.

The Value and Honor of Human Being

In Mevlana's perception, human being is both the most honorable of all the creatures and a small example of God. God's qualities are perfectly immanent in human beings. In his book *Fih-i Mafih,* Mevlana argues (1994) that complaining the created means complaining the creator. So, hatred and hostility must be hidden.

Reaching the value and honor of human being is only possible by exploring these qualities in him/her. Mevlana describes human being as the holder of the qualities of God. Thus, it is the perfect man who deserves to be called as human being (Yiğitler, 2005, p. 335).

If human being is a small example of God and, in the last analysis, they are reflections of one existence, human nature cannot represent malice. According to Mevlana, from their creation men are good. Their wickedness is not an unchangeable element in their makeup but a mere temporary occurrence which proves and registers the existence of the good.

Let's trace the ideas of Mevlana in his own words: "The aim of the (creation of) universe is man" (Majalis-i Sab'a, cited in Can, 2005).

The Perfect Man (*Kamil Insan*)

Mevlana argues superiority and beauty of human being as a potential; activation of this potential is possible only by deserving such a nature. Thus, deserving this potential is to become a perfect man (Ozturk, 2000, p.51).

Kamil Insan is a human being who is modest, patient, tolerant, and generous, can stand malicious actions, sees them as maturing miseries, encourages goodness and discourages badness, aids the poor, and covers the errors of others. According to Mevlana, there is no man independent of errors by nature, but human nature is essentially based on the goodness of human beings. In order to keep human nature as good one must always try to clean his/her bodily appetites and enrich morality.

Kamil Insan is a total spirit. While Nietzsche's "super man" is a model of power, domination, appetite and victory; Mevlana's *kamil insan* is characterized by service and compassion (Ozturk, 2000, p. 52). Therefore, the way to the perfect man is built upon dedication to others. Human beings have no right to blame others before being aware of his/her own faults:

When a man accuses others he is really seeing only his own faults. First, a man must rid himself of malice, envy, hatred, cruelty and other vices before he may blame others (Fih-i Mafih, 1994).

The path to the perfect man is the path to discover one's own self. Self is nothing in itself without any rational connection to and simultaneousness with other beings, and at the same time, comprises all the existence, creates the meaning and constitutes the reference for all creation. Without any reference to self, in Mevlana's thought, neither be universe understood nor the self be unchained from duality in the Cartesian sense. Sufi understanding of self is both a challenge to the individuality as a particular form, though it proclaims independency, and manifests all being immanent in it – the particular comprising the universal.

Self is the center of existence. And if all the existence is only understood via self so is God. Self is the only gate for a perfect comprehension of God. There is no such probability of understanding God and his creation of the universe before exploring the mysteries of the self since the later hides the meaning of the creation in itself. Mevlana suggests that discovering one's own self is to discover all s/he seeks:

"There is another soul in your soul, seek out for it.
There is a treasury in the Mount Body, seek out for that treasury.
O mystic who goes on ! If you are really capable then seek.
Not outside, but seek what you are seeking for in yourself."

(Rubais, 22, cited in Ergin and Johnson, 2005)

"Since a raw (immature) man is unable to perceive the state of a ripe (mature) man, it is better to cut a long story short and bid him farewell."

"An immature man" means a person who is preoccupied with sensory pleasures and is detained from journeying further on the path of love, while "a ripe man" is a person who has gone further towards Truth (Turkmen, 2007).

According to Mevlana, the one who is aware of his/her self cannot harm others:

„Let us implore God to help us to gain self-control:
one who lacks self-control is deprived of the grace of the Lord.
The undisciplined man does not maltreat himself alone,
but he sets the whole world on fire"

(Mathnavi, 79-80)

Social Order/Ideal Society

Mevlana's understanding of society puts human being into the center. It is the individual who determines the society and the state, so change is realized through individual. For a peaceful society, individual must be the focus of change. Change is so essential that even the destiny of human beings can change. Change is a conscious activity to re-build the world. Three causes of change are creation, divine love and education (Douglas-Klotz, 2002).

Mevlana describes social order as the compliance of the individual interests. Social order is essential. In the absence of order anomy appears and sets barriers for human perfectness. In an ideal society, productivity fundamentally determines the functioning. People must be placed into roles according to their skills and equipment (Beytur, 2005).

A perfect social order requires the respect for human diversity. Keeping the differences as they are is for the benefit of society. Human beings are different from each other as a divine blessing. Freedom of expression is the essence of a diverse community. Mevlana versifies diversity in the following:

„Single breath of man is worth that of a life;
A hair that falls down from him (or her) is worth that of a mine"

(Rubais, 76 cited in Ergin and Johnson, 2005)

Social Problems

Problems in society should be coped with gradually. Empowerment/ encouragement is the best strategy to deal with social problems and "faults" in Mevlana's terminology. Mevlana gives a great inspiration to all helping professions in that he suggests people who claim to "correct" the society first start with themselves. Only the people who are in the process of perfection may help others see the clues of this path.

As the ideal of humanity is to reach the perfect man so that goodness and badness do not constitute a binary opposition anymore, a society comprised of such intentions would be a solidarist one. As Mevlana defines "human being" as the perfect man, the ones who do not assist the ones in need cannot be called as human being. Moreover, assistance should be offered to everybody without discrimination. Assistance is not a sign of superiority nor a symbol of power, but a sharing of wealth and human capital for a more just society. Let's look at Mevlana's own words:

> *„Go, help others; time will appreciate your help.*
> *It never forgets those helps.*
> *Everybody left his or her wealth behind, so yours will be left, too.*
> *Then, one's leaving goodness behind is better than his leaving wealth."*

> (Rubais, 88 cited in Ergin and Johnson, 2005)

As to criminality, Mevlana argues that nobody is criminal potentially, so they must be treated smooth and compassionate. Furthermore, nobody can be accused without any act or proof just due to his/her thoughts or doubts. In addition, punishment requires a good examination of the individual's own situation/context. Contextuality of punishment is the key to Mevlana's encouragement strategy. Punishment in Mevlana's understanding is a way of showing compassion. Punishing especially the exploiters of rights and labor is the most supreme compassion for them (Ozturk, 2000).

Relevance of Mevlana's Ideas for Social Work

According to the definition of IFSW (2007), the social work profession promotes social change, problem solving in human relationships and the empowerment and liberation of people to enhance well-being. Social work grew out of humanitarian and democratic ideals, and its values are based on respect for the equality, worth, and dignity of all people. Human rights and social justice serve as the motivation and justification for social work action. In solidarity with those who are disadvantaged, the profession strives to

alleviate poverty and to liberate vulnerable and oppressed people in order to promote social inclusion.

The profession of social work is dedicated to consolidate and improve the value and honor of human beings. All social work practices can essentially be evaluated in this basis. Core values and beliefs of the profession are the right of all people to freedom and well-being; treatment with dignity and respect; the acknowledgement of their strengths, resilience, and the capacity of change; the acceptance of diversity and difference as enrichment; mutual responsibility; need of belonging; uniqueness; and self-determination (Witkin, 1999, p. 297; Levy, 1973; Bisman, 2004; Pinto, 2002; Allen-Meares et al., 2000; Chow, 1987; Silavive, 1995). However, based on modernist paradigms, the profession of social work has been criticized for changing society without any sensitiveness to diversity and plurality. In these grounds, the professional practice disregards individual and cultural complexity. In order to avoid an engineering endeavor the profession must focus on the individual as a valuable and honorable human being as its very definition suggests. Today, if the profession of social work is to become an agent to transform the world for a peaceful and just one as its beginnings had foreseen, it must be seeking for alternative paradigms from all over the world. Alternative paradigms would contribute to a more inclusive practice. Let's pay attention to his words:

> *"We are all the branches of a single tree, all fellow travelers."*

> (Divan-i Kebir)

> *"My brothers, my brothers. Do not allow yourselves to be restrained by a power or an emotion. If you want your hearts to be opened to the truth, then love one another, give your hand in friendship. Those who are enemies are trapped in an ambush..."*

> (Rubais)

As an alternative thinking system, Mevlana would enrich our practice as social workers. His basic argument of human beings as essentially valuable and honorable is closely related to the social work's belief of respect for human value and honor. Any endeavor which does not aim at maximizing human value and honor cannot be regarded within the scope of social work. Thus, the starting points of Mevlana's philosophy of human being and the profession of social work are exactly the same.

Mevlana's conception of human being is the one which sees human being as open to change and development. In appropriate conditions, all human beings have the capacity to change and improve. In Mevlana's thought,

human being is good by nature, but the conditions in his/her environment sometimes put him/her in negative positions. The responsibility at this point cannot be attached to the individual. In opposition to the individualistic modern societies, Mevlana's thought suggests a solidarist social life in which everybody has the responsibility for each other. Mevlana's perfect man (*kamil insan*) is the one who avoids desires, feels responsibility for the society, and dedicates himself/herself to the service of others with compassion. According to Mevlana, one can reach perfectness by exploring/ understanding his/her self. Without an awareness of the self nobody can be categorized as the real human being. So, what the profession of social work aims at is to create an awareness of the self and potential of all as human beings. Such an individual is at the same time conscious of social problems, knows how to contribute to the solution of those problems, and feels responsibility for the common enrichment of the society. The profession does not define social problems as originating from the faults of individuals, but locates the causes in environmental factors. In this sense, it advocates for human rights and social justice by empowering the individual. As Mevlana emphasizes the importance of change capacity, the profession of social work is also built upon the belief in the capacity of human beings for change.

Mevlana's understanding values human beings as having the potential to contribute to the society regardless of their sexual, ethnic, religious, cultural background. This addresses multiculturalism. His philosophy calls for the acceptance of every single person without any discrimination because he invests upon the potential of each for all. This is similar to the intention of social work intervention. Deprived groups can never be excluded from the mainstream of the society because they can enrich the society by their significant contributions. In this sense, social workers are not normalizing agents to rehabilitate these groups by transforming them within the mainstream, but they are the agents to make the mainstream benefit from the potentials of the deprived. This approach of the profession gets rid of the binary oppositions within the society as the mainstream and the peripheries, but brings all the elements together to build one whole comprising of the diverse (unity in diversity). This is in harmony with Mevlana's conception of unity. Moreover, the formula in Mevlana's thought for living with others is love which is the constituting faculty of unity:

> „Luck becomes your sweetheart, if it becomes helpful.
> Love helps you in your daily routines,
> Consider not the loveless life as life.
> For, it will be out of consideration."

<div align="right">(Majalis-i Sab'a, cited in Can, 2005).</div>

Self determination is an ethical principle in social work that recognizes the right and needs of clients to be free to make their own choices and decisions. Inherent in the principle is the requirement for the social worker to help the client know what the resources and choices are and what the consequences of selecting any of them will be. Usually, self-determination also includes helping the client implement the decisions made. Self-determination is one of the major factors in the helping relationship (Barker, 1999). Mevlana argues that the individual determines everything. S/he can also change his/her destiny. This complies with the basic principle of social work: self-determination. Nobody can act on behalf of the client unless s/he does not allow to be so. Just like social work's understanding of the client, the individual in Mevlana's thought holds the right to self-determination with his/her innate capabilities. Valuable and honorable human being – and the perfect man in Mevlana's sense – is the one who decides on among various alternatives and determines his/her life using his/her free will. It could also be put that being a true human being in Mevlana's sense means being aware of and using the right to self-determination. Otherwise, the individual would never be the actor/subject of his/her life. What the profession of social work is built upon is this ideal for everyone.

Especially as to the individual and social problems, Mevlana's analysis is in harmony with social work's person in his/her environment approach. He classifies problems in relation to their interactions with other systems in the environment instead of "blaming the victim." Indeed Mevlana sees the problems we face as not an unchangeable element in our nature but a mere temporary occurrence which proves and registers the existence of the good. Thus, human being is good by nature, and all the opposite are the means to make us discover the good. So, the bad is not the bad in itself, but a mere reflection of the essential good. The profession of social work does not focus merely on the results of human behavior, but on interactional factors that affect occurrences. The goal of the profession is not to search for the guilt, but put forth the very causes of the problems within wider systems. So, human beings cannot be perceived as the very cause of problem situations.

Last but not the least part of the discussion is the quality of the helper. According to Mevlana, the one who assumes the role to help others should first and foremost know his/her self because knowing the self is the key to understanding all existence. Just like in Mevlana's thought, an efficient social work practice is the one which is self-reflective. In this position, the worker is not the "other" side of the helping relation, but an indispensable part of and insider within it. Perlman (1979) conceptualizes such a relationship as "disciplined use of the self in interaction."

Conclusion

According to Hodge (2002) as the NASW Code of Ethics stipulate, it is important for social workers to increase their understanding regarding the unique characteristics of spiritually-based cultures to be able to provide culturally competent services to clients.

Given that the majority of social workers appear to address spirituality in practice settings, it is critical that resources be developed that can be used to equip practitioners to work with spirituality in an ethically consistent manner (Hodge, 2002). So, what Besthorn argues (2002) is deeply relevant for our discussion. He suggests that a diverse spirituality that the profession has to achieve must recognize the interconnectedness and interdependence of all things as the fundamental biological and spiritual norm rather than the exception and must encourage the rightful, non-anthropocentric place of humankind in the cosmic/spiritual order.

It seems mandatory under the light of the discussion that social workers integrate spiritual resources and demands into their intervention. This would bring social work practice new envisagement and opportunities to be an inclusive practice.

The focus of social work practice is the interaction between human beings and society, which creates problems and constantly changing needs. The profession of social work is based on the presumption that all its professional activities aim at increasing the quality of life of human beings and society. Despite the fact that human beings and their environments are constantly exposed to various problems, the profession invests upon the capacity of human beings for development. It believes such a capacity is inherently available. It is vitally important that wider social conditions be changed in order to make use of this capacity. In this point, human being is the key to change and determine his/her own life. The profession of social work deals with human and social problems in a way that it respects human value and honor.

Having the individual and society as its focus, the profession of social work aims at enhancing social justice and human rights. This is also an expression of human value and honor. In doing so, the basis of the profession is human diversity. Human value and honor can only be achieved and respected through the respect for diversity. Every single human being has the capacity to change the conditions surrounding both himself/herself and a wider society. This brings about a feeling of responsibility of individuals to each other and society they live in. In this point, the very essential mission of social work is to improve this capacity and responsibility of human beings without any discrimination. Diversity cannot be refrained from,

but it should be relied upon because it is the very source of enrichment and democratic society.

Based on the highest respect for human value, the profession of social work must be open to every single philosophy deriving from different cultures in order to be fully effective in the helping relationship. This paper tries to suggest one of those philosophies, which has potentially significant effects on social work practice. Originating in Turkey, but influential throughout the world, Mevlana's ideas on human beings and society are in line with the basic values of social work.

What constitutes the basis of social work is the premise that human beings are good by nature. This shows a harmony with Mevlana's views on human beings and society. His fundamental axioms on human beings such as human being as the center of the universe, respect for human value and honor, a solidarist society, the right to self-determination, human diversity, the belief in human potential for change, self-consciousness, and person in his/her environment have a great inspiration for social work practice. Social work profession may be vitally influential for the lives of ordinary people if it achieves to make all these concepts alive in every sphere of life by refining and purifying their theoretical bonds. These concepts are essentially intrinsic into the lives of ordinary people, so what the profession is supposed to do is to re-conceptualize its framework by referring to the living concepts and philosophies. Let's give the final words to Mevlana:

> *"Blow the horn of unity and let us all gather together,*
> *And join as one*
> *Let us forget our differences, if only for a moment.*
> *If we are carried away beyond ourselves, we will become the color*
> *of water."*

<div align="right">(Rubais, 126 cited in Ergin and Johnson, 2005)</div>

Abstract

While we, as the children of the twenty first century, witness an atrophying conscious of empathy for others in an age of cruel experiences all over the world, what we urgently need is the all encompassing universal values of humanity for peace. This paper addresses the implications of Mevlana's thought, one of the greatest thinkers of history, for social work practice which has been criticized for almost two decades on the grounds that it has traditionally been based on the values of the Enlightenment that brought about a strictly modernist practice which excluded the values and subjectivity of the client disregarding her/him as an "actor". This paper also

celebrates the 800th anniversary of his birth, which UNESCO decided to be associated with during the year 2007.

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CZĘŚĆ III. RECENZJE

ZBAWIENNA ROLA REWOLUCJI
TRADYCJA VS. ZMIANA W KOŚCIELE KATOLICKIM

RECENZJA KSIĄŻKI: ADAM WIELOMSKI, *KOŚCIÓŁ W CIENIU GILOTYNY. KATOLICYZM FRANCUSKI WOBEC REWOLUCJI (1789 – 1815),* WYDAWNICTWO VON BOROWIECKY, WARSZAWA 2009, ss. 586.

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Cezary Kalita

Państwowa Szkoła Wyższa im. Papieża Jana Pawła II w Białej Podlaskiej

Napisano wiele książek o Rewolucji Francuskiej. Zawarte w nich treści próbują określić jej fenomen i znaczenie dla przyszłości, a szczególnie dla współczesnych (na ile jej ideały są ciągle obecne). Podkreślano w nich jej znaczenie polityczne i ukształtowanie nowego europejskiego porządku świata. Francuzi (nie tylko badacze) w oczywisty sposób przeceniali jej znaczenie i wpływ na nowożytne losy świata. Można było doszukiwać się w niej, tak jak uczyniła to Hannah Arendt w znakomitej książce *O rewolucji,* końca polityczności w Europie i przyjęcia perspektywy socjalnej, w opozycji do rewolucji amerykańskiej, która okazała się bardzo trwała w swoich konsekwencjach (zachowała żywą polityczność). Można o Rewolucji Francuskiej pisać w kontekście historycznym i takich książek o charakterze monumentalnym jest wiele. Książka Adama Wielomskiego wpisuje się w tę pierwszą tradycję – jest twórczą historią idei.

Główną tezą książki *Kościół w cieniu gilotyny. Katolicyzm francuski wobec rewolucji (1789–1815)* jest przekonanie (bardzo dobrze uzasadnione), że Rewolucja Francuska przyczyniła się do ukształtowania współczesnego wizerunku papiestwa. Teza ma oczywiście szersze uwarunkowania i jej główna przesłanką metapolityczną jest idea, że w czasach chaosu zwiększa się zapotrzebowanie na porządek (często zakorzeniony w tradycji). Rewolucja w kategoriach społecznych jest największym z chaosów (chociaż paradoksalnie porządkowanych przez różne idee), i to na dodatek bardzo krwawym (w tytule książki przypomina nam o tym „cień gilotyny". Dlatego oprócz niepokoju, niepewności, ciągłej zmienności wytwarza ona ideę porządku, pewności i stałości. Socjolog użyłby określenia, że obok funkcji pojawiają się dysfunkcje. I taką ostoją „wykreowaną" przez rewolucje staje się Kościół rzym-

ski, a ucieleśnieniem porządku staje się dogmat o nieomylności papieża. Formalnie zapisu kanonicznego dokonano na Soborze Watykańskim I (1869–1870). „To wtedy powstaje papiestwo w takim pojęciu, które dziś uważamy za *naturalne i oczywiste*" (s. 8), czyli to chaos rewolucyjny wykreował zapotrzebowanie na porządek uosabiany przez papieża i stolicę apostolską.

Przyjęcie tezy o „zapotrzebowaniu" na doktrynalne zagwarantowanie pewności w świecie, symbolicznie i realnie reprezentowane przez dogmat nieomylności papieża a w konsekwencji i ostatecznie jego jurysdykcji – *Roma locuta causa finita* (Rzym orzekł, sprawa skończona), rodzi pewne wątpliwości. Czy historycznie ukształtowany dogmat ma uzasadnienie, które czyni go nie tylko postulatem, lecz czymś „obiektywnie prawdziwym"? Nie znajdziemy jego artykulacji w tekstach przyjętych za święte w teologii chrześcijańskiej. Stąd protestanci go odrzucą jako „wymysł człowieka". Jednak Kościół katolicki, to nie tylko pismo święte, lecz również Tradycja (idea podstawowa obok Prawa w judaizmie). Miała i ma ona fundamentalne znaczenie w nauczaniu i organizacji Kościoła. Tak więc to historia wyznacza i kształtuje jego konserwatywne oblicze. Dobitnie ujął to św. Augustyn w cytowanym przez Adama Wielomskiego stwierdzeniu: „nie uwierzyłbym samej Ewangelii, gdyby mnie nie doprowadził do tego autorytet Kościoła" (s. 9).

Ważne i ciekawe jest rozumienie „Tradycji" przez autora *Kościoła w cieniu gilotyny.* Warto tu nadmienić fakt, że Adam Wielomski jest jednym z istotniejszych ideologów konserwatyzmu w Polsce (redaktor naczelny kwartalnika „Pro Fide, Rege et Lege", administrator i redaktor strony internetowej www.konserwatyzm.pl). Dłuższy fragment

cytatu ilustruje rozumienie Tradycji w Kościele katolickim, ale też jest znakomitą analizą „tradycji politycznej": „Tradycja przeto jest *żywa* i rozwija się w sposób teleologiczny (celowy), polegający na jej pogłębianiu i przyjmowaniu za obiektywne tego, co wcześniej pojawiło się jako hipoteza. Postęp w rozwoju tradycji polega nie na kreacji nowych twierdzeń, ale na dowodzeniu i rozwijaniu strych. Tradycja jest *żywa*, ale nie na tyle zmienna, co ewoluująca w kierunku przewidzianym przez Ducha Świętego: ku pogłębianiu Prawdy" (s. 9). Mimo że takie rozumienie Tradycji jest przypisywane Henry'emu Newmanowi (*O rozwoju doktryny chrześcijańskiej* – 1845), autor wskazuje na jej wcześniejsze źródło interpretacyjne, jakim jest dzieło Melchiora Cano *O źródłach teologicznych* (1563). Jednak niech nas nie zmyli dbałość autora o kontekst historyczno-bibliograficzny stawianych i uzasadnianych tez.

Historyzm Wielomskiego należy czytać bardzo współcześnie. Mówi o sporach z przeszłości, ale gdybyśmy pozbyli się wskazanych kontekstów historycznych i bibliograficznych, ujrzymy bardzo aktualne problemy i konflikty. Dlatego ta książka jest bliższa tradycji uprawiania myślenia nad ideami Hannah Arendt (żywej i *aktualnej* historii jako narracji), niż tradycji Leopolda von Ranke (historia ograniczona do analizy dokumentowej i wolna od dydaktyzmu oraz prezentyzmu – również cenionego i cytowanego przez autora recenzowanej książki). Historia jest dla Adama Wielomskiego (chociaż nie formułuje tego *explicite,* ale „wyraźnie" *implicite*) podobnie jak dla Cycerona: *Historia (vero) testis temporum, lux veritatis, vita memoriae, magistra vitae, nuntia vetustatis* (Historia [która jest] świadkiem czasów, światłem prawdy, życiem pamięci, nauczycielką życia, zwiastunką przyszłości).

Zachowując obiektywizm faktów historycznych, chce jednak zmierzyć się z problemami współczesnego Kościoła katolickiego. Nie ukrywa swego poglądu i nadziei wyrażonych we wstępie (*Od Autora*): „jedynie skupienie się wokół autorytetu naszego Ojca Świętego Benedykta XVI – autora przełomowej encykliki *Spe salvi* i restauratora Mszy Świętej w rycie tradycyjnym – może stworzyć szanse na przezwyciężenie kryzysu, cechującego Europę w porewolucyjnej epoce, którą Oswald Spengler określił mianem *zmierzchu Zachodu*" (s. 14). Można oczywiście się nie zgodzić z przesadną tezą o kryzysie Europy, lecz nie zwalnia to nas z diagnozy wszelkiego typu zagrożeń, związanych z jej współczesnością i przyszłością. Wielomski formułuje jedną z nich, którą należy traktować, biorąc pod uwagę przedstawione jej naukowe i historyczne uzasadnienie, z należytą rzetelnością.

Wspomniana podstawowa teza książki, że rozwój Tradycji katolickiej we Francji ma charakter teleologiczny (celowy), jest ilustrowana sporem gallikanizmu z ultramontanizmem i „zwycięstwa" tego ostatniego. Pojęcia „gallikanizm" i „ultramontanizm" są mało rozpoznawalne w tradycji polskiej myśli społeczno-religijnej. Upraszczając, można „gallikanizm" zdefiniować jako ruch na rzecz ograniczenia władzy papieskiej na świecką (królewską). Wyższość władzy świeckiej nad duchową wynika z założenia, że władza bezpośrednio pochodzi od Boga – król jest wybranym pomazańcem bożym (może więc ingerować w sprawy eklezjalne), a papież jest tylko administratorem Kościoła (kancyliaryzm wskazywał dodatkowo na nadrzędność Soboru nad papieżem). Ultramontanizm to prymat papieża w kwestiach wiary i moralności, ale i często polityki. Władza innych pochodzi z nadania papieża, który rozciąga swoją dominację również na postanowienia soborowe (może je unieważnić). Władza (instytucja władzy) pochodzi od Boga, ale o osobie władcy (duchowej i świeckiej) decyduje papież.

Gallikanizm upadł jako doktryna religijna w wyniku ogłoszenia dekretu o nieomylności papieża przez Sobór Watykański I, ale ostatecznie jako idea polityczna odniósł pyrrusowe zwycięstwo w postaci rozdziału państwa od Kościoła we Francji w 1905 roku. Jednak należy zadać pytanie, czy nie jest to ciągle żywa idea, dotycząca zagadnienia władzy? Czy władza ma jakąkolwiek legitymację? A jeśli tak, to co jest jej źródłem – Bóg, człowiek, Lud, tradycja? Jest to też aktualny problem współczesnego świata dotyczący stosunków i zależności władzy religijnej i świeckiej, rozdziału lub jedności wyznania i państwa.

Problem stosunku władzy duchowej i świeckiej ukazany jest w realiach francuskich oraz w poprzedniej epoce. Tak naprawdę jednak to zagadnienie ma charakter uniwersalny i zmieniają się tylko aktorzy (papież, mułła, Anatoliach, król, prezydent, dyktator, itd.), konteksty geograficzne, jak również religijne (katolicyzm, prawosławie, islam, itd.). Można ubolewać, że zabrakło takiej rzeczowej dyskusji i ścierania się stanowisk doktrynalnych w Polsce o rolę Kościoła i państwa (w ogóle brak jest tradycji takiego dyskursu). Recenzowana pozycja *Kościół w cieniu gilotyny. Katolicyzm francuski wobec rewolucji (1789–1815)* jest w tym względzie ważnym głosem w dyskusji, chociaż jest to, odczytywany współcześnie, głos aluzyjny, niczym *Bajka o pszczołach, czyli wady prywatne – zyskiem publicznym* Bernarda de Mandeville'a (niby o pszczołach, a jednak o nas). Czasy się zmieniły i zmieniają, argumenty pozostają ciągle te same.

Książka zawiera sześć uporządkowanych chronologicznie rozdziałów: 1. Kościół w systemie politycznym i doktrynalnym Francji przed rokiem 1789 (szczególną uwagę autor poświęca ciekawym analizom gallikanizmu i jansenizmu); 2. Oświecenie i Rewolucja wobec Kościoła; 3. Katolicy po stronie Rewolucji (idea tzw. kościoła konstytucyjnego); 4. Triumfalny pochód ultramontanizmu przez Francję (przegrana gallikanizmu); 5. Przełom – Konkordat Napoleoński (Artykuły Organiczne a „katastrofa" koncepcji gallikańskiej); 6. Eklezjologia emigracji francuskojęzycznej. Ponadto wartością książki jest bardzo obszerna bibliografia, związana z jej tematyką, co świadczy o wielkiej staranności badawczej autora.

Oprócz recenzowanej książki, warto polecić również inne monografie z dorobku Adama Wielomskiego związane z nią tematycznie:
– *Od grzechu do apokatastasis. Historiozofia Josepha de Maistre'a* (1999);
– *Filozofia polityczna francuskiego tradycjonalizmu, 1789–1830* (2003);
– *Nacjonalizm francuski 1886–1940. Geneza, przemiany i istota filozofii politycznej* (2007);
– *Konserwatyzm. Główne idee, nurty i postacie* (2007);
– *Konserwatyzm między Atenami a Jerozolimą. Szkice postawerroistyczne* (2009).

CZĘŚĆ III. BOOK REVIEWS

**THE ROLE OF THE FRENCH REVOLUTION IN SALVATION;
TRADITION VERSUS CHANGE WITHIN THE CATHOLIC CHURCH**

BOOK REVIEW: ADAM WIELOMSKI, *KOŚCIÓŁ W CIENIU GILOTYNY. KATOLICYZM FRANCUSKI WOBEC REWOLUCJI (1789 – 1815)* (*THE CHURCH IN THE SHADOW OF THE GUILLOTINE. THE FRENCH CATHOLICISM TO THE FRENCH REVOLUTION (1789 – 1815)*), VON BOROWIECKY PUBLISHING, WARSAW 2009, PP. 586.

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Ample books have been written on the French Revolution. They attempt to describe this event and its meaning to the future especially related to the present; in as much its ideals being still in evidence. It's political significance is stressed as is the shaping of a new European order for the world. The French however, and not just the academics, rather obviously overrated the significance of the revolution to the current status of the world. One can find an excellent treatise on this matte, as written by Hannah Arendt in a book entitled "*On Revolution*" concerning the end of politicism in Europe and the adoption of social perspectives. This being in contrast to the American Revolution which has demonstrated to be very enduring in its consequences, whilst retaining its vivid politicism. One can write about the French Revolution in a historical context and indeed there are many such books of a monumental nature. This book by Adam Wielomski belongs however to the former aforementioned tradition; it is a creative history of ideas.

The main thesis put forward in the book "*The Church in the shadow of the guillotine; French Catholicism to the French Revolution (1789–1815)*" is the very well justified conviction that the French Revolution contributed to shaping the modern image of the papacy. This thesis, of course, has wider implications and its main meta-political premise is the idea that during a period of chaos there is an increased need for order; often ensconced in tradition. A social revolution is the sort that brings about the most chaos, although paradoxically it is then put in order by various ideas, accompanied by the most serious blood-

letting; the book's title reminds us of this by the use of the term "shadow of guillotine". This is why, apart from the anxiety, uncertainty and continual change, concepts then arise of order, certainty and stability. A sociologist would use terms such as functional or dysfunctional. The revolution thus "created" such a mainstay as embodied by the Catholic Church, where order became part of the dogma of papal infallibility. This became official canon law from the First Vatican Council from 1869-1870 and at this time a papacy came into being which in our modern understanding we recognize as being "*natural and obvious*" (p. 8); which is that the chaos of revolution gave rise to the need for order as personified by the Pope and the Holy See.

It is seen that the adoption of the proposition "on satisfying the demand" for guaranteeing doctrinal certainty in this world breeds certain doubts; both symbolic and real as represented by the dogma of papal infallibility and his final judgment – *Roma locusta causa finita* (i.e. Rome has spoken, the matter is closed). Is the establishment of dogma throughout history justified then, caused not only by demand but by something "objectively real"? Scriptures and texts recognised as being holy by Christian theology do not speak about this. For this reason protestants reject this as an "invention of mankind". However to the Catholic Church this is not only a holy text but also a tradition; a fundamental idea together with Judaic Law. It was and is of fundamental significance in the teaching and organization of the church. And so, it is history which determines and shapes the conservative aspects of dogma. This was clearly understood by

St. Augustine as cited by Adam Wielomski's statement: "I would not have believed the very Gospels if it hadn't been for the authority of the Church that guided me" (p. 9).

The viewpoint on "Tradition" written by the author of "*The Church in the shadow of the guillotine*" is both important and interesting. It is worth mentioning the fact that Adam Wielomski is one of the most significant ideologues of conservatism in Poland and is the editor-in-chief of the quarterly '*Pro Fide, Rege et Lege*' as well as being the administrator and editor of the website www. konserwatyzm.pl. A longer fragment of the aforementioned citation provides an illustration on his understanding of tradition in the Catholic Church and as well as an excellent analysis of the "political tradition": "Tradition is taken as being *living* and develops in a teleological manner (purposeful), relying on deepening and accepting that which is objective which previously had appeared to be a hypothesis. The progress in the development of tradition depends not on creating new assertions but on proving and developing the old ones. The tradition is *living* but not varying as much as the evolution towards the direction that is foreseen by the Holy Ghost: About the deepening of Faith" (p. 9). Despite such a conception of tradition being credited to Henry Newman in his work ("*On the development of Christian doctrine – 1845"*), this author calls upon an earlier source of interpretation from the study by Melchior Cano entitled "*On theological sources*" (1563). However one should not be misled by the care taken by the author under this review in the historical-bibliographical contexts as given in his proposed theses which he then justifies.

The historicism of Wielomski should be read in a very contemporary way. He deals with the struggles of the past but if we ignore the historical settings, we can then see the same problems and conflicts occurring as now. This is why the book is nearer to the tradition of thinking about ideals as practiced by Hannah Arendt (a narrative of living and *current* history), rather than the tradition of Leopold von Ranke (a study of history limited to the analysis of documents and free of didacticism and presentism – also esteemed and cited by the author of the book under review). Although Adam Wielomski clearly uses the term *implicit* as opposed to *explicit*, history is to him like it is to Cicero" "'*Historia (vero) testis temporum, lux veritatis, vita memoriae, magistra vitae, nuntia vetustatis*", (i.e. History [which is] a witness of times past, the light of truth, living memory, a teacher on life and a herald of the future).

In staying objective to historical facts, the author manages to tackle the current problems of the Catholic Church. He does not hide from his views and hopes that he expresses in the introduction (*From the author*): "only by giving attention to the authority of our Pope, the Holy Father Benedict XVI – the author of the encyclical "*Spe salvi*" and the restorer of the Holy Mass in the Latin tradition – may a chance be created to triumph over the crisis in Europe in the post-revolutionary period which Oswald Spengler defined as "*the twilight of the West*" (p. 14). One can off course disagree with the exaggerated thesis concerning Europe in crisis, but it does not release us from diagnosing all the threats concerned with the present and future. Wielomski formulates one of these which should be treated with deserved respect bearing in mind the presented historical and scientific justifications.

The aforementioned thesis of the book, that the development of Catholic tradition in France is teleological in nature (purposeful), and is demonstrated by the struggle between "Gallicanism" and "Ultramontanism" and in the victory of the latter. These two concepts are, however, hardly recognized in Polish traditions of socio-religious thinking. In summary one can define Gallicanism as a movement to limit papal powers over the secular (royal). The supremacy of the secular over the church arises from the premise that the monarchy directly comes from God – the King as God's anointed chosen (he can thence interfere in elections), but the pope is only an administrator of the church (and furthermore this is illustrated by the chancellorship of the Vatican council exercising it's supremacy over the pope). On the other hand, Ultramontanism is the primacy of the pope on issues of faith, morality and frequently politics. The authority of others stems from papal grants, who also extends his domination to the resolutions of the Vatican council (in that he can annul them). The ruling power (institutions of government) comes from God but the candidature of the ruler (both church and secular), is decided by the pope.

Gallicanism collapsed as a religious doctrine as a result of the decree over papal infallibility proclaimed by the First Vatican Council and also finally, as a political idea, it achieved a pyrrhic victory in 1905 when in France the state and church became separated. However one should ask the question: is it still a living idea related to the issues of ruling government?. If so, then what is its source – God, man, the people, tradition? This is also a current world problem concerning the relations and sub-ordination of religious and secular authorities, the separation of or the unity of faith and the nation.

The problem in the relations between secular and church authorities is shown in current French

realities as well those from the previous age. In truth, this issue really has an universal character and only the actors change (e.g. the pope, mullahs, patriarchs, kings, presidents, dictators etc.), or the geographical area as well as religions (Catholicism, Orthodox Church, Islam etc.). In this book one can regret that there was nott enough of such factual discussion devoted to doctrinal controversies and positions in Poland on the role of Church and State (as generally there is no tradition of such a discourse). The review of the church's position in "*The Church in the shadow of the guillotine. The French Catholicism to the French Revolution (1789–1815)*" bears in this respect an important voice in this debate, although in relation to today it is read as an allusion. A good example is provided by the analogy in a fairytale "*Tales of the bees, that is private faults – public gain*" by Bernard de Mandeville, ostensibly about nothing more than bees but it really is about us. Times have changed and are changing but the issues remain constantly the same.

The book is ordered into six chronological chapters as follows: 1. The Church within the political and doctrinal system of France before 1789 (special attention is devoted to an interesting analysis of Gallicanism and Jansenism); 2. The Enlightenment and Revolution in relation to the Church; 3. Catholics on the side of the Revolution (the so-called idea of a Constitutional Church); 4.

The triumphal return of Ultramontanism in France (defeat of Gallicanism); 5. The turning point – The Concordat of Napoleon (Organic Articles and the "Catastrophe" concept of Gallicanism); and 6. The Ecclesiology of the French speaking emigration. Moreover, the book benefits from a very extensive bibliography concerning its subject matter which bears witness to the great diligence of the author shown in this study.

In addition to this book review, it is also worth recommending other monographs by Adam Wielomski on related themes as follows;

–   *Od grzechu do apokatastasis. Historiozofia Josepha de Maistre'a* (*From sin to apokatastasis. Historiosophy of Joseph de Maistre*" (1999);
–   *Filozofia polityczna francuskiego tradycjonalizmu, 1789 – 1830 (The political philosophy of French traditionalism, 1789–1830)* (2003);
–   *Nacjonalizm francuski 1886–1940. Geneza, przemiany i istota filozofii politycznej (French Nationalism 188-1940. Genesis, transformation and the essence of political philosophy)* (2007);
–   *Konserwatyzm. Główne idee, nurty i postacie (Conservatism. Main ideas, trends and persons)* (2007);
–   *Konserwatyzm między Atenami a Jerozolimą. Szkice postawerroistyczne (Conservatism between Athens and Jerusalem. Post-Averroistic Sketches)* (2009).

ROLA SZKOŁY W WYCHOWANIU AKSJOLOGICZNYM

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Beata Wołosiuk

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Streszczenie: Najważniejszym miejscem, gdzie dokonują się relacje między wychowankiem a wychowawcą jest rodzina, a tuż za nią szkoła. Prezentowany artykuł podejmuje zagadnienie dotyczące kształcenia aksjologicznego w edukacji wczesnoszkolnej. Szkoła jest instytucją odpowiedzialną (obok rodziny) za wychowanie do wartości.

Struktura artykułu ma charakter teoretyczno-badawczy. Część teoretyczna obejmuje literaturę przedmiotu, ukazuje podstawowe problemy dotyczące wartości w edukacji, procesu wartościowania oraz nabywania kompetencji aksjologicznych.

W artykule zostały przedstawione opinie rodziców uczniów klas III na temat roli edukacji wczesnoszkolnej w wychowaniu do wartości.

Słowa kluczowe: wartości, wartościowanie, edukacja, wychowanie aksjologiczne.

W artykule zostanie przedstawiony problem wychowania do wartości dzieci w młodszym wieku szkolnym. Młodszy wiek szkolny to bardzo ważny etap w życiu człowieka, ponieważ ma ogromny wpływ na jego dalsze lata. Wiek wczesnoszkolny jest okresem, w którym kształtuje się osobowość dziecka. Jest to szczególny czas podatności na oddziaływania wychowawcze oraz wzmożonej ciekawości poznawczej. Szkoła, obok rodziny, to ważne miejsce, gdzie dzieci poznają wartości. W związku z tym zostaną przedstawione opinie rodziców uczniów klas III na temat roli szkoły w kształceniu aksjologicznym.

Wartości w edukacji

B. Śliwerski uważa, że edukacja „to podstawowe pojęcie w pedagogice, obejmujące ogół wielowymiarowych działań oraz procesów służących wychowaniu i kształceniu osób czy grup społecznych. (łac. *educatio*, *educo* – wprowadzać, wyciągać, poprowadzić, wychować)". Autor ten pisząc dalej zauważa, że edukacja jest „z jednej strony czynnikiem kształtowania człowieka, z drugiej niezodzownym warunkiem twórczym jego naturalnego rozwoju" (Śliwerski 2003, s. 906).

Tak więc pod szerokim określeniem „edukacja", kryją się te wszystkie działania, które w pełni uformują człowieka. Do tych działań zaliczymy wychowanie, które jest pojęciem wieloznacznym i różnie definiowanym. Najogólniej można powiedzieć, że wychowanie jest świadomym i celowym oddziaływaniem, które ma doprowadzić do zmian

w osobowości wychowanka. Edukacja zawiera również pojęcie kształcenia, czyli nauczania i uczenia się razem wziętych.

Kształcenie to stwarzanie warunków dla wszechstronnego rozwoju intelektualnego człowieka, czyli nabywania wiedzy, poglądów, przekonań, rozwijania zdolności i zainteresowań. Nie jest możliwe wychowywanie i kształcenie tożsamości młodego człowieka bez konkretnych „drogowskazów", czyli wartości.

Jak słusznie zauważa K. Popielski, „wartości wiążą ludzką egzystencję z życiem, aktywizują przebieg relacji międzyludzkich i są przedmiotem odniesienia dla jednostki. Przyciągają i otwierają na rzeczywistość, zobowiązują i ukierunkowują. W tym znaczeniu można o nich orzekać w terminach rzeczywistości, które umożliwiają jednostce proces autotransformacji, transformacji, ukierunkowania i podejmowania decyzji" (Popielski 1996, s. 62).

W pedagogice wartości często są rozumiane jako coś, co jest ważne i cenne dla jednostki i społeczeństwa. Wartości są postrzegane jako pozytywne odczucia, które stanowią cel ludzkich dążeń.

Jak pisze M. Nowak: „Wartości wyrażają to, *co być powinno* i *czego pragniemy*, wpisują w rzeczywistość pewien *sens ostateczny*, ukazują to, co naprawdę istotne i do czego warto dążyć. Są filarami, na których opiera się życie społeczne, osobiste i wspólnotowe. Podstawowe zachowania ludzkie są przez nie motywowane i regulowane. Stanowią podstawowy element ludzkich postaw i przyjętego stanowiska" (Nowak 2001, s. 393).

Człowiekowi, który nie posiada żadnych wzorców, nie ma punktów odniesienia w życiu, grozi moralna ambiwalencja. Taki stan może powodować zagubienie, niepewność i apatię człowieka. Dlatego zadaniem pedagoga – tego, który prowadzi – jest wychowywać w duchu szacunku do wartości moralnych. Jak mówi D. Von Hildebrand – życie moralne wspiera się na następujących postawach:

- prawości,
- wierności,
- kierowania się poczuciem odpowiedzialności,
- szacunku dla prawdy,
- dobroci (Kuczkowski 1985).

Edukacja może zapewnić wszechstronny rozwój dziecka tylko wtedy, gdy wartości będą obecne podczas całego procesu wychowania i kształcenia. Świadome i celowe oddziaływanie na wychowanka jest możliwe, jeśli wychowawca będzie znał hierarchię wartości i w umiejętny sposób przekaże je dziecku, tak by ono przyjęło je jako swoje.

Istnieje ścisły związek między wartościami a celami edukacji szkolnej. Cele edukacji szkolnej są uświadomionym i „zaprogramowanym" efektem, jaki pragniemy otrzymać w rozwoju wychowanków w czasie trwania procesów kształcenia. To, jakie te cele będą, zależy od wychowanka, wychowawcy a także sytuacji społecznej, kulturalnej i politycznej.

Proces wartościowania

Wartościowanie możemy określić jako wydawanie sądów oceniających, akceptujących bądź nie dany stan rzeczy, pewne zachowania, zjawiska, zdarzenia. Wartościowanie domaga się uznania pierwotnie pewnego systemu wartości, który jest podstawą wydawania sądów. Według „Nowego słownika języka polskiego" – „wartościować" to „określać wartość etyczną, moralną, kulturalną czegoś; szeregować coś według tej wartości, szacować" (Dunaj 2005, s. 764). Wartościowanie bywa definiowane jako „dokonywanie ocen, sądów oceniających, zawierających aprobatę lub dezaprobatę stanu rzeczy, zdarzenia lub zachowania się (postępowania)" (Łąkowski 1982, s. 836).

Jak zauważa P. Oleś: „Coś jest, a raczej staje się wartością dlatego, że jest cenione, pożądane lub uznawane za wartość. Realizacja tak rozumianych wartości utożsamia się z dążeniem do akceptowanego lub pożądanego celu, a samo to zachowanie (dążenie) bywa uważane za przejaw wartościowania" (Oleś 1989, s. 9).

Proces wartościowania, zdaniem Z. Matulki, przebiega dwoma torami. Najpierw budowana jest subiektywna hierarchia wartości, potem następuje ocenianie, na ile wybrane wartości zostały przez daną osobę przyswojone. Tak więc, budowanie hierarchii wartości dziecka ma miejsce, gdy jest ono wprowadzane w świat wartości przez wychowawców i nauczycieli (Matulka 2005).

Rathes, Harmina i Simon uważają, że proces wartościowania powinien przebiegać według następujących postulatów:

- wolny wybór;
- spośród samodzielnie odkrytych alternatywnych możliwości;
- po rozważeniu konsekwencji każdej z nich;
- oceniany pozytywnie przez jednostkę i będący dla niej źródłem satysfakcji;
- uzgodniony z wartościami innych ludzi, czyli również przez innych oceniany pozytywnie;
- zgodnie z wyborem działania, czyli wybór ma prowadzić do realizacji wartości;
- wytworzenie się trwałych wzorców postępowania, czyli realizacja wartości w powtarzalnych zachowaniach (Matulka 2005).

Należałoby się obecnie zastanowić, jak zorganizować edukację szkolną, aby była ona edukacją ku wartościom. Jest to trudny problem, ponieważ wychowanie do wartości nie może być tożsame z automatycznym narzucaniem wychowankowi pewnych wartości.

Jak przekazywać wartości, aby proces ten nie był indoktrynacją, zastanawia się M. Nowak, który za O. Reboul podaje przykład Jezusa Chrystusa jako Nauczyciela, który mówiąc o wartościach, nie wykazuje intencji wychowywania, mimo to jednak wychowuje. W związku z tym proponowane są następujące strategie:

1) strategia dysonansu;
2) strategia świadectwa;
3) strategia stymulacji (Nowak 2001).

K. Olbrycht rozważając proces wychowania do wartości twierdzi, że kształcenie aksjologiczne powinno zawierać „pomoc w uzyskaniu wiedzy o wartościach i wartościowaniu oraz w rozwoju struktur i procesów odpowiadających za: umiejętność rozpoznawania sytuacji wyboru, podejmowania decyzji o przyjęciu postawy wartościującej, wybór celów i środków związanych z określonymi wartościami oraz gotowość do podejmowania i umiejętność realizowania odpowiadających tym wartościom działań" (Olbrycht 2000, s. 88). W związku z tym na kształcenie aksjologiczne – według K. Olbrycht – składa się:

1) nauczanie o sposobach traktowania wartości, o ich uzasadnianiu, konsekwencjach wyboru wartości;
2) odnoszenie działań wychowawczych do pewnych koncepcji wartości.

Internalizacja wartości będzie możliwa, jeśli wartości zostaną:
- poznane,
- zrozumiane,
- zaakceptowane,
- wytworzy się do nich pozytywny stosunek,
- podjęte zostaną samodzielne wybory i związane z nimi działania na rzecz realizacji tych wartości (Olbrycht 2000, s. 27).

Urzeczywistnianiu wartości sprzyja przestrzeganie następujących zasad:
1. Zasada osobowego rozwoju.
2. Zasada kształtowania odpowiedzialności za decyzje i wybory.
3. Zasada pogłębiania myślenia przyczynowo-skutkowego.
4. Zasada własnej autonomii.
5. Zasada stałego pogłębiania wiedzy (Ostrowska 1999, s. 23).

Najczęściej stosowaną metodą przekazywania wartości w procesach edukacji szkolnej jest – jak zauważa Z. Matulka – podawanie informacji. Poznanie wartości, chociaż niezwykle potrzebne, nie jest jeszcze przekazywaniem wartości. Ważnym elementem w procesie przekazywania wartości jest zrozumienie, przeżycie ich atrakcyjności, uczuciowe i wolicjonalne „przylgnięcie" do nich. Skutecznym sposobem przekazywania wartości jest aktualizacja ich przez uczniów w konkretnych sytuacjach wychowawczych (Matulka 1998).

Z. Matulka uważa, że proces ten powinien odbywać się poprzez dialog pedagogiczny, który zakłada partnerstwo wychowawcy i wychowanka. Nie tylko wychowawca przekazuje wartości wychowankowi, lecz obserwujemy tu interakcję zachodzącą między dwoma podmiotami. Ważne jest, aby zachowania obydwu partnerów były autentyczne.

Zadaniem wychowawców jest odnajdywanie i realizowanie pożądanych wartości. Dzieci należy zachęcać do samodzielnych wyborów, stwarzać możliwości dokonywania wolnych wyborów, ukazywać konsekwencje wyborów. W związku z tym można posłużyć się różnymi technikami klasyfikacji wartości (np. arkusze pytań pisemnych, niedokończone zdania, samodzielne konstruowanie przez dzieci listy wartości, psychodramę) (Węgrzyńska 2004).

Etapy nabywania kompetencji aksjologicznych

Organizując proces wychowania do wartości należy uwzględnić różne etapy osiągania kompetencji aksjologicznych, które U. Ostrowska uporządkowała w następujący sposób:

a) odkrywanie, rozpoznawanie wartości (wymagana jest zdolność rozpoznawania dobra i zła przez dziecko, zauważania tego co jest cenne);

b) rozumienie wartości (potrzebna jest wiedza o wartościach, oraz zdolność logicznego myślenia);

c) uznawanie, akceptowanie wartości (dziecko powinno przyjmować wartości jako własne);

a) urzeczywistnianie wartości (wymagana jest konsekwencja jeśli chodzi o zakres przyjętych zobowiązań w świecie wartości);

b) tworzenie wartości (wymagana jest aktywność twórcza) (Ostrowska 2006).

Nauczyciel, który przygotowuje ucznia do dorosłego życia, poprzez przekazywaną wiedzę i własną postawę wprowadza go w świat wartości. Wychowawca pokazuje, na czym polegają wymieniane przez niego wartości. Ważny jest sposób prowadzenia zajęć, wskazany jest dialog i twórcze zaangażowanie ucznia (Ostrowska 1999).

Zadaniem wychowawców, jak zauważa K. Ostrowska, jest wykształcenie człowieka, który będzie interesował się światem, jak również sobą, będzie poszukiwał informacji, ale także będzie w stanie zgromadzoną wiedzę przyjąć, przetworzyć oraz wykorzystać dla dobra własnego i innych (Ostrowska 1999).

Wychowawca powinien przekazać takie wartości, które dziecko będzie mogło osobiście odnaleźć w otaczającym świecie i bezpośrednio doświadczyć, a w konsekwencji przyjąć jako własne (Malicka 1999).

Analiza badań empirycznych dotyczących roli szkoły w wychowaniu do wartości

Wychowując dziecko do wartości należy odpowiedzieć: w jaki sposób dziecko poznaje wartości, jak wygląda ich przekaz? W obecnej części zostaną zaprezentowane wyniki badań własnych dotyczących uwarunkowań wychowania do wartości. Przedstawione będą opinie rodziców dzieci klas III mieszkających w powiecie bialskim. Dane dotyczące uwarunkowań wychowania do wartości w rodzinie zostały uzyskane w badaniu *Kwestionariuszem dla rodziców* własnego autorstwa. Jak zostało wcześniej powiedziane, szkoła, obok rodziny jest ważnym miejscem, gdzie dzieci poznają wartości. W związku z tym zostaną przedstawione opinie rodziców uczniów klas III na temat roli szkoły w kształceniu aksjologicznym.

Rodzice zostali zapytani, czy ich zdaniem wartości stanowią ważny problem w edukacji szkolnej. Opinie badanych przedstawia wykres nr 1.

Zdecydowana większość respondentów (275 osób – co stanowi 88,7% wszystkich badanych) uważa, że wartości stanowią ważny problem w edukacji szkolnej, 12 rodziców (3,9%) twierdzi, że szkoła powinna zajmować się tylko przekazywaniem wiedzy, 3 badanych (1%) nie miała zdania na ten temat.
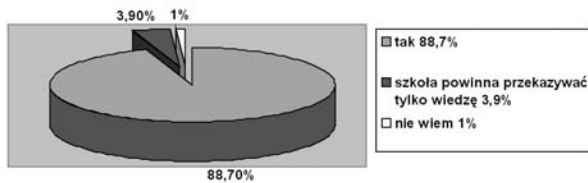
**Wykres 1.** Czy wartości zdaniem rodziców
to ważny problem w edukacji szkolnej?

Wykres nr 2 przedstawia, kto zdaniem respondentów odpowiedzialny jest za kształtowanie pożądanych wartości.
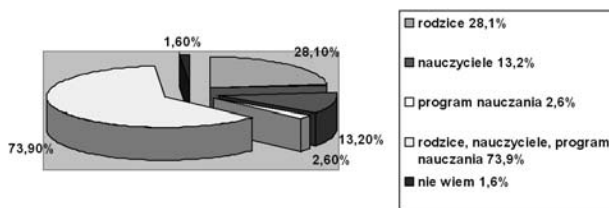
Wykres 2. Osoby odpowiedzialne za kształtowanie
pożądanych wartości.

Rodzice uważają, że za kształtowanie pożądanych wartości odpowiedzialni są zarówno rodzice, nauczyciele i program nauczania (takiej odpowiedzi udzieliło 229 rodziców – co stanowi 73,9% wszystkich badanych), 28,1% respondentów jest zdania, że to głównie rodzice powinni kształtować wartości ich dzieci, 13,2% uważa, iż jest to zadanie przeznaczone dla nauczycieli, 2,6% badanych twierdzi, że odpowiedzialny jest za to program nauczania, a 1,6% respondentów nie ma zdania na ten temat.

Jak wynika z analizy przeprowadzonych badań zdecydowana większość rodziców twierdzi, że na kształtowanie pożądanych wartości u ich dzieci obok rodziców i nauczycieli wpływ ma również program nauczania w szkole, więc słuszne wydaje się następne pytanie, które zadała autorka artykułu. Dotyczy ono znajomości, obowiązującego dzieci respondentów, programu nauczania w szkole. Wykres nr 3 ukazuje, jak przedstawia się u badanych rodziców znajomość programu nauczania ich dzieci.
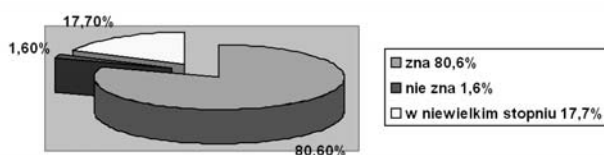
Wykres 3. Znajomość programu nauczania
przez rodziców.

Jak przedstawia wykres większość respondentów (250 osób, co stanowi 80,6% wszystkich badanych) twierdzi, iż zna program nauczania swojego dziecka. 55 osób (17,7%) w niewielkim stopniu orientuje się, czego uczy się jego dziecko w szkole. 5 rodziców (1,6%) przyznało się, że nie zna programu nauczania swojego dziecka.

Rodzice zostali zapytani, w jaki sposób zostali zapoznani z programem nauczania ich dziecka. Otrzymane w wyniku badań informacje przedstawia tabela nr 1.

Tabela 1. Sposób, w jaki rodzice poznali program
nauczania swojego dziecka

Sposób poznania programu nauczania	N	%
Program nauczania przedstawił dyrektor szkoły na zebraniu rodzicielskim	29	9,4
Rodzice o programie nauczania dowiedzieli się od wychowawcy dziecka	215	69,4
Rodzice poznali program przeglądając podręczniki dziecka	25	8,1
Odrabiając z dzieckiem lekcje	14	4,5
Rozmawiając z dzieckiem	11	3,5
Od innych rodziców	1	0,3
Rodzice są nauczycielami	4	1,3
Brak odpowiedzi	11	3,5
Razem	310	100

Jak przedstawia powyższa tabela, rodzice o programie nauczania swojego dziecka dowiedzieli się w szkole: od wychowawcy dziecka – 215 osób (co stanowi 69,4% wszystkich respondentów) oraz dyrektora szkoły – 29 rodziców (9,4%). Rodzice mogli napisać w jaki inny sposób poznali program nauczania dziecka. Z tej możliwości skorzystało 30 (9,6%) rodziców, podając, że o programie nauczania dowiedzieli się: odrabiając z dzieckiem lekcje, rozmawiając z dzieckiem, od innych rodziców, program znają, ponieważ sami są nauczycielami. 11 osób (3,5%) nie udzieliło odpowiedzi na pytanie dotyczące źródła poznania programu nauczania swojego dziecka. Można więc przypuszczać, iż nie znają programu nauczania swojego dziecka.

Następnie zapytano rodziców, jakie wartości powinny ich zdaniem być propagowane w edukacji.
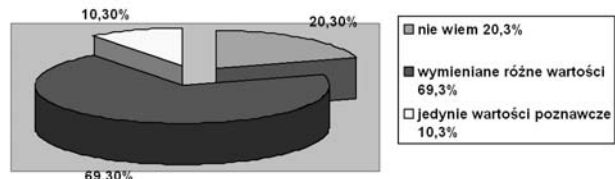
Wykres 4. Jakie wartości powinny być lansowane
w edukacji zdaniem rodziców?

Odpowiedzi rodziców były zróżnicowane. Część rodziców uważa, że w szkole należy głównie zwracać uwagę na wartości poznawcze (32 osoby co stanowi 10,3% wszystkich respondentów). W grupie tej można spotkać następujące wypowiedzi: „w szkole dziecko powinno zdobywać przede wszystkim wiedzę", większość wymienia inne wartości (215 osób – 69,3%). 63 (20,3%) osoby nie wiedziały, jakie wartości należy brać pod uwagę w edukacji ich dziecka.

Tabela nr 2 przedstawia, jakie wartości oprócz poznawczych, zdaniem rodziców, powinny być propagowane w edukacji zintegrowanej.

Tabela 2. Wartości, które zdaniem rodziców powinny być lansowane w edukacji zintegrowanej

Wartości	N
patriotyzm	125
uczciwość	120
dobroć, dobro	116
prawda, prawdomówność	110
wartości religijne	52
miłość	39
szacunek	31
rodzina	28
pomaganie innym	23
sprawiedliwość	19
zdrowie, zdrowy styl życia	19
życzliwość	18
pracowitość	17
praworządność	15
przyjaźń	15
odpowiedzialność	14
rzetelność	13
sumienność	11
szczerość	11
tolerancja	10
wrażliwość	9
honor	9
obowiązkowość	8
lojalność	8
piękno, wartości estetyczne	7
wyrozumiałość	6
poszanowanie ludzkiej godności	5
samodzielność	5
zaradność	5
radość życia	4
uprzejmość	4
odwaga	3
harmonia	2
obiektywność	2
pokój	2
dbałość o środowisko naturalne	1

Jak zostało zaprezentowane w powyższej tabeli, wartości, które zdaniem rodziców, oprócz poznawczych (wiedzy, mądrości, poznania), powinny być głównie rozpowszechniane w edukacji zintegrowanej to: patriotyzm, uczciwość, dobro, prawda, religia, miłość, szacunek, rodzina.

Następny etap przeprowadzonych badań pozwolił poznać, na jakie wartości, zdaniem rodziców, zwraca się szczególną uwagę w szkole, do której uczęszcza ich dziecko.

Tabela 3. Wartości preferowane przez szkołę (w opinii rodziców).

Wartości	N	%
Wartości poznawcze	211	74,6
Wartości moralne (dobro, uczciwość, sprawiedliwość)	107	37,8
Wartości religijne	53	18,7
Wartości osobowe (zdolności, tendencje rozwojowe)	51	18
Wartości społeczne (patriotyzm, samorządność, praworządność)	51	18
Wartości witalne (zdrowie, siła, równowaga psychiczna)	34	12
Wartości estetyczne (piękno, wzniosłość, tragizm)	20	7,1
Nie wiem	8	2,8

Jak zostało przedstawione w tabeli nr 3, rodzice uważają, iż w szkole, do której uczęszczają ich dzieci, najczęściej zwraca się uwagę na wartości poznawcze, następnie moralne i religijne.

Założono, że rodzice wychowując swoje dziecko, na pewne wartości, które są lansowane przez szkołę, nie zwracali szczególnej uwagi. Tabela nr 4 przedstawia wartości, które są preferowane w szkole, a nie były brane pod uwagę przez rodziców w wychowaniu dzieci.

Tabela 4. Wartości lansowane przez szkołę, które nie były uwzględniane przez rodziców w wychowaniu dzieci.

Wartości	N	%
poznawcze (poznanie, wiedza)	20	6,5
moralne (dobro, uczciwość, sprawiedliwość)	9	2,9
estetyczne (piękno, wzniosłość, tragizm)	70	22,6
osobowe (zdolności, tendencje rozwojowe)	26	8,4
społeczne (patriotyzm, samorządność, praworządność)	41	13,2
witalne (zdrowie, siła, równowaga psychiczna)	17	5,5
religijne	4	1,3
nie ma takich	20	6,5
nie wiem	103	33,2

Część badanych rodziców nie wiedziała, czy istnieją wartości, których nie uwzględniali w wy-

chowaniu swoich dzieci (103 osoby, co stanowi 33,% respondentów). Rodzice przyznają, że wartościami najczęściej pomijanymi w wychowaniu a uwzględnianymi w edukacji szkolnej są: wartości estetyczne (tak uważa 70 osób – 22,6% badanych), wartości społeczne (41 osób – 13,2%) i wartości osobowe (26 osób – 8,4%).

Poproszono rodziców o ocenę wpływu edukacji zintegrowanej na kształtowanie pożądanych wartości ich dzieci.
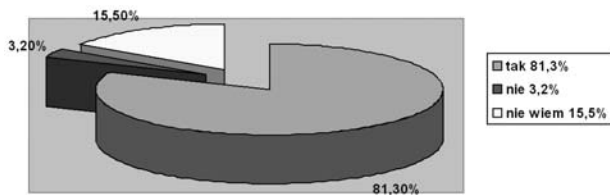
Wykres 5. Czy edukacja zintegrowana pozytywnie wpłynęła na rozwój pożądanych wartości dziecka (w opinii rodziców)?

Jak pokazuje powyższy wykres, większość rodziców (252 osoby co stanowi 81,3% wszystkich badanych) uważa, że edukacja szkolna pozytywnie wpłynęła na rozwój pożądanych wartości ich dziecka. 48 osób (15,5%) nie ma zdania na ten temat. Natomiast tylko 10 badanych (3,2%) twierdzi, że według nich edukacja szkolna nie ma znaczenia w kształtowaniu pożądanych wartości ich dziecka.

Ważne jest poznanie wartości, które zdaniem rodziców rozwinęły się od czasu, gdy ich dziecko uczęszcza do szkoły. Tabela nr 5 przedstawia wykaz wartości, które rozwinęły się u dzieci w szkole.

Tabela 5. Wartości, które rozwinęły się u dzieci w szkole (zdaniem rodziców)

Wartości	N	%
poznawcze (poznanie, wiedza)	242	78,1
moralne (dobro, uczciwość, sprawiedliwość)	101	32,6
estetyczne (piękno, wzniosłość, tragizm)	48	15,5
osobowe (zdolności, tendencje rozwojowe)	114	36,8
społeczne (patriotyzm, samorządność, praworządność)	98	31,6
witalne (zdrowie, siła, równowaga psychiczna)	73	23,5
religijne	86	27,7
razem	310	100,0

Największa grupa badanych rodziców uważa, że wartościami, które ich zdaniem rozwinęły się od czasu, gdy ich dziecko uczęszcza do szkoły, są wartości poznawcze. Tak twierdzi 242 respondentów, co stanowi 78,1% wszystkich badanych), osobowe (114 osób – 36,8%) i moralne (101 osób – 32,6%). Najmniej rodziców wskazuje na wartości estetyczne, które rozwinęły się u ich dzieci w szkole (48 osób – 15,5%).

Jak już zauważono, wychowanie do wartości nie może polegać na narzucaniu ich dziecku. Ważny więc wydaje się problem przekazu wartości. Dlatego zapytano rodziców, w jaki sposób ich zdaniem uczniowie poznają wartości w szkole? Tabela nr 6 przedstawia uzyskane odpowiedzi.

Tabela 6. Przekaz wartości w edukacji zintegrowanej (w opinii rodziców)

Sposób w jaki dziecko poznaje wartości w szkole	N	%
Poprzez informację jak należy postępować	156	50,3
Przykład osób znaczących	58	18,7
Uczeń pod kierunkiem nauczyciela stara się rozpoznać, zrozumieć i zaakceptować pewne wartości	176	56,8
Inne formy	9	2,9
Nie wiem	14	4,5
Razem	310	100

Ponad połowa badanych (176 osób, co stanowi 56,8% wszystkich respondentów) uważa, że ich dzieci pod kierunkiem nauczyciela starają się rozpoznać, zrozumieć i zaakceptować pewne wartości. 156 osób (50,3%) twierdzi[1], iż najczęściej stosowaną metodą przekazywania wartości w szkole ich dzieci jest informacja, jak należy postępować.

Wnioski

1. Badani rodzice uważają, że za kształtowanie pożądanych wartości odpowiedzialni są zarówno rodzice, nauczyciele jak i program nauczania.

2. Zdaniem respondentów w edukacji zintegrowanej powinny być głównie lansowane następujące wartości: patriotyzm, uczciwość, dobro, prawda, religia, miłość, szacunek, rodzina.

3. Rodzice uważają, iż w szkole, do której uczęszczają ich dzieci, najczęściej zwraca się uwagę na wartości poznawcze, następnie moralne i religijne.

4. Rodzice przyznają, że wartościami najczęściej pomijanymi w wychowaniu a uwzględnianymi w edukacji szkolnej są: wartości estetyczne (tak uważa 70 osób – 22,6% badanych), wartości społeczne (41 osób – 13,2%) i wartości osobowe (26 osób – 8,4%).

5. Większość rodziców (252 osoby co stanowi 81,3% wszystkich badanych) uważa, że edukacja szkolna pozytywnie wpłynęła na rozwój pożądanych wartości ich dziecka.

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[1] podobnie zauważa Z. Matulka, *Przekazywanie wartości w procesie edukacji szkolnej.* „Edukacja i Kultura", 1998, nr 1(23), s. 12 - 14.

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ROLE OF SCHOOL IN AXIOLOGICAL EDUCATION

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Abstract: The most important place where relations do proceed between a pupil and a tutor is family and, next to it, school. The presented manuscript addresses the issues of axiological education in early school education. The school (apart from the family) is an institution responsible for instilling values in the upbringing process.

The manuscript is divided into theoretical and research sections. The first elaborates on the literature of the subject, depicts major problems linked with values in education, the process of valuation and gaining axiological competences. The latter provides opinions of parents of IIIrd class pupils on the role of early school education in teaching values in the upbringing process.

Key words: values, valuation, education, axiological education.

This manuscript will be focused on the problem of instilling values in the upbringing process of children at a younger school age. This is a very significant stage in man's life, for it exerts a substantial impact on the successive years of life. The early school age is also a period when child's personality is being developed. It is also a time of special susceptibility to upbringing actions and of intensified cognitive curiosity. Apart from family, school is an important place where children are learning values. For this reason, this manuscript will present opinions of parents of IIIrd class pupils on the role of school in axiological education.

Values in education

B. Śliwerski elucidates that education "is the basic concept in pedagogics, covering a total of multi-dimensional activities and processes that serve to bring up and educate persons or social groups (Latin: *educatio*, *educo* – to introduce, to get out, to conduct, to educate)". Furthermore, this author notices that education is "on the one hand a factor of man's evolving, but on the other – an inseparable creative condition of man's natural development" (Śliwerski 2003, p. 906).

Thus, the broad notion of "education" encompasses all actions that lead to complete development of man, including upbringing which is a wide term comprehended in variety of definitions. Highly generally speaking, upbringing may be defined as a conscious and deliberate action aimed at triggering changes in personality of a pupil. Education contains also the notion of education, namely teaching and learning altogether.

Education means also to provide conditions for versatile intellectual development of man, i.e. acquisition of knowledge, views, and beliefs, development of skills and interests. Yet, neither bringing up or education of the identity of a young man are possible without precise "guideposts", meaning – without values.

As aptly emphasized by K. Popielski, "values bind human existence with life, activate the course of interpersonal relations and are a point of reference to an individual. They attract and open a person to the reality, they oblige and guide. In that meaning, a statement may be made on them in terms of reality, which enables an individual the process of auto-transformation, transformation, orientation and decision-making" (Popielski 1996, p. 62).

In pedagogics, values are often comprehended as something that is important and valuable to both an individual and to society. They are perceived as positive feelings that are the objective of man's pursuit.

According to M. Nowak: "Values express *what should be and what we aspire to*, they inscribe some *ultimate sense* into the reality, they depict what is really significant and what should be strived for. They are pillars, the social, personal and community life is based on. They motivate and control basic human behaviors. Finally, they constitute the primary element of man's attitudes and adopted stance" (Nowak 2001, p. 393).

A man who does not possess any role models, any points of reference in life, is at risk of moral ambivalence. Such a condition is likely to elicit the feeling of loss, uncertainty and apathy in a man. Hence, a task of a teacher – the one who guides – is to educate in the spirit of respect for moral values. According to D. Von Hildebrand – moral life is based on the following attitudes:

- rightness,
- faithfulness,
- being driven by the sense of responsibility,
- respect for the truth,
- kindness (Kuczkowski 1985).

Education may assure versatile development of a child only when the values are present in the entire process of upbringing and education. Conscious and deliberate affecting a pupil is possible when a tutor knows the hierarchy of values and transfers them to a child skillfully, so that the child takes them as his own.

There is a close relationship between values and objectives of school education. The latter are a conscious and "programmed" effect we wish to achieve in the development of pupils over the period of educational processes. What objectives are to be achieved depends on the pupil and tutor, but also on the social, cultural and political situation.

Process of valuation

Valuation may be defined as expressing evaluating opinions, either accepting or not accepting the existing state of affairs, some behaviors, phenomena, and events. Valuation requires accepting primarily some system of values which is the foundation for making judgments. According to "Nowy słownik języka polskiego" ("A New Dictionary of Polish") – "to valuate" means "to determine the ethical, moral and cultural value of something; to rank something according to that value, to estimate" (Dunaj 2005, p.764). Valuation is also defined as "evaluating, making evaluating judgments that either approve or disapprove the state of affairs, an event or behavior (acting)" (Łąkowski 1982, p. 836).

As claimed by P. Oleś: "Something is, or rather is becoming a value because it is valued, desired or acknowledged as a value. Realization of values comprehended in this way equates with the pursuit of either accepted or desired aim, and the behavior (pursuit) itself is sometimes believed to be a symptom of valuation" (Oleś 1989, p. 9).

The process of valuation, according to Z. Matulka, proceeds in two stages. First, a subjective hierarchy of values is being built, which is followed by evaluation to what extent the selected values were acquired by a person. Hence, the building of a hierarchy of values of a child occurs only when the child is introduced into the world of values by tutors and teachers (Matulka 2005).

Rathes, Harmina and Simon hold an opinion that the process of valuation should proceed according to the following postulates:

- free choice;
- out of independently-discovered alternative possibilities;
- after consideration of consequence of each of them;
- evaluated positively by an individual and being a source of satisfaction to the individual;
- agreed with values of other persons, meaning: evaluated positively also by the others;
- in accordance with the selection of action, meaning that the selection is to lead to the realization of values;
- establishing firm models of behavior, meaning realization of values in repeatable behaviors (Matulka 2005).

A question arises, then, how to organize school education to make it the education into values. It is a difficult problem, because instilling values in the bringing process cannot mean automatic imposing some values onto a pupil.

How to convey values in order not to make that process an indoctrination? – this question has been formulated by M. Nowak who after O. Reboul provides and example of Jesus Christ as a Teacher who when speaking about values has no intention of bringing up, yet He is bringing up even though. Taking this into account, the following strategies are postulated:

1) strategy of dissonance;
2) strategy of testimony;
3) strategy of stimulation (Nowak 2001).

In considering the process of bringing up into values, K. Olbrycht claims that axiological education should involve "help in acquiring knowledge about values and valuation as well as in the developing structures and processes responsible for: ability to recognize situation of choice, making a decision about accepting the valuating attitude, the selection of objectives and means linked with specified values as well as readiness to undertake and capability to complete actions corresponding with these values" (Olbrycht 2000, p. 88). Bearing this in mind, according to K. Olbrycht, the axiological education includes:

1) teaching on ways of treating values, on their substantiation, and on consequences of the choice of values,

2) referring educational activities to selected concepts of values.

Internalization of values will be possible if:
- they are learnt,
- they are understood,
- they are accepted,
- positive attitude is adopted towards them,
- independent choices are made and respective actions are undertaken to implement those values (Olbrycht 2000, p. 27).

Implementation of values is facilitated by compliance to the following principles:

1. Principle of personal development.
2. Principle of developing responsibility for decisions and choices.
3. Principle of extending the cause-and-effect thinking.
4. Principle of autonomy.
5. Principle of ceaseless enrichment of knowledge (Ostrowska 1999, p. 23).

As noticed by Z. Matulka, the most common method of conveying values in processes of school education is providing information. The learning of values, though highly needed, does not still mean the conveying of values. An important element in the process of transferring values is understanding and experiencing their attractiveness, emotional and volitional "adherence" to them. An effective method of conveying values is their revision by pupils in selected upbringing situations (Matulka 1998).

Z. Matulka claims that this process should proceed through a pedagogical dialog, which assumes partnership between a tutor and a pupil. Not only the tutor conveys values to the pupil, but interaction may be observed between these two subjects. It is vital, therefore, for behaviors of both the partners to be authentic.

The task of tutors is to find and implement desired values. To this end, the tutors should encourage children to make independent choices, should provide conditions for making free choices and demonstrate consequences of these choices. This may be accomplished with different techniques of values classification (e.g. sheets of written questions, unfinished sentences, construction of the list of values by children, psychodrama). (Węgrzyńska 2004).

Stages of acquiring axiological competences

When organizing the process of instilling values in the upbringing, consideration should be given to various stages of achieving axiological competences, which – according to U. Ostrowska – follow the below-presented order:

a) discovering, recognizing values (this stage requires: the ability to recognize good and evil by a child and the ability to notice what is valuable);

b) understanding values (this stage requires: knowledge about values and ability of logical thinking);

c) acknowledging, accepting values (this stage requires a child to adopt values as his own);

d) implementing values (this stage requires consequence in the range of commitments made in the world of values);

e) creating values (this stage requires creative activity) (Ostrowska 2006).

A teacher who is preparing a pupil for the adult life introduces the pupil into the world of values through the knowledge transferred and own attitude. A tutor shows what the values conveyed consist in. The organization of classes is important, yet dialog and creative engagement of a pupil are recommended as well (Ostrowska 1999).

K. Ostrowska is of the opinion that the task of tutors is to raise a man who will be interested in the world, and also in himself, will be searching for information but also will be able to adopt, process and use the gathered knowledge for the good of his own and others (Ostrowska 1999).

A tutor should convey such values that a child will be able to find by himself in the surrounding world, experience personally, and finally adopt as his own (Malicka 1999).

Analysis of empirical studies on the role of school in instilling values in the upbringing process

While instilling values to a child in the upbringing process, the following question should be answered: in what way does a child learn the values, how foes their transfer look like? This section of the manuscript will present results of a survey on determinants of learning values in the education process. It will depict opinions of parents of IIIrd class pupils from the Bialski Province. Data referring to determinants of values learning by children in a family were collected with the use of an own-construction *Questionnaire for parents*. As mentioned above, school – next to the family – is an important place where children are learning the values. For this reason, the presented opinions of parents of IIIrd class pupils will refer to the role of school in axiological education.

The parents were asked whether, in their opinion, values constitute a significant problem in school education. Opinions of the respondents were presented in Figure 1.
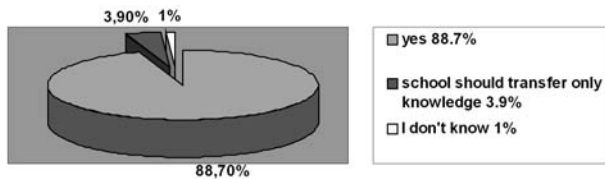
Figure 1. Do values constitute a significant problem in school education?

The majority of respondents (275 persons, which constitutes 88.7% of all respondents) claims that the values constitute a significant problem in school education, whereas 12 parents (3.9%) are of the opinion that school should focus only on knowledge transfer, and 3 parents (1%) have no opinion on that matter.

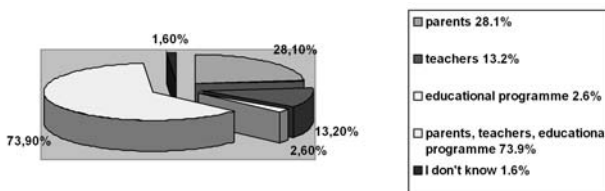Figure 2 depicts who, in the opinion of parents, is responsible for developing desired values in children.

Figure 2. Who, in parents' opinion, is responsible for developing desired values in children?

As shown in Figure 2, respondents are of the opinion that both parents, teachers and educational programme are responsible for developing desired values (229 persons, which constitutes 73.9% of all respondents). The second group of respondents (28.1%) claim that mainly parents should develop desired values in their children, whereas 13.2% of the parents think that this is a task of teachers and another 2.6% – that this is a task of educational programme. Finally, 1.6% of the respondents hold no opinion on that matter.

As it results from the analysis of study results, the majority of parents claim that the development of desired values in their children is affected, apart from parents and teachers, also by the educational programme implemented at school, thus the next question asked by the author of this manuscript seemed to be substantiated. It refers to respondents being familiar with the educational programme conducted at schools attended by the children. Figure 3 illustrates familiarity of parents with educational programme of their children.

As shown in Figure 3, most of the respondents (250 parents, which is 80.6% of all respondents) declare familiarity with the educational programme of their children. In turn, 55 persons (17.7%) possess little knowledge of what their children are learning about at school, whereas 5
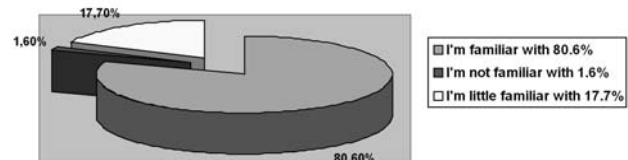

Figure 3. Parents' familiarity with educational programme

parents (1.6%) admit not to know the educational programme of their children at all.

Next, the parents were asked how they were familiarized with the educational programme of their child. Data collected in this respect are presented in Table 1.

Table 1. Mode the parents were familiarized with the educational program of their child

Mode of becoming familiarized with educational programme	N	%
Educational program was presented by school headmaster on parents meeting	29	9.4
Educational program was presented by child's tutor	215	69.4
Parents were familiarized with the programme while looking over child's textbooks	25	8.1
Parents were familiarized with the programme while doing homework with their child	14	4.5
Parents were familiarized with the programme while talking to their child	11	3.5
Parents learnt about the programme from other parents	1	0.3
Parents are teachers	4	1.3
No answer	11	3.5
TOTAL	310	100

As shown by results collated in Table 1, parents declared to learn about the educational programme of their child at school: from child's tutor – 215 persons (which constitutes 69.4% of all respondents) and from school headmaster – 29 persons (9.4%). In the questionnaire, the parents could also describe other ways of becoming familiarized with the educational programme of their child. This was an opportunity to 30 parents (9.6%) who declared that they have learnt about the educational programme: while doing homework with their child, while talking to heir child, from other parents, or because they are teachers themselves. In contrast, 11 persons (3.5%) did not answer that question. It may, thus, be assumed that they are not familiar with the educational programme of their child.

Afterwards, the parents were asked to express their opinion on what values should be promoted in education.
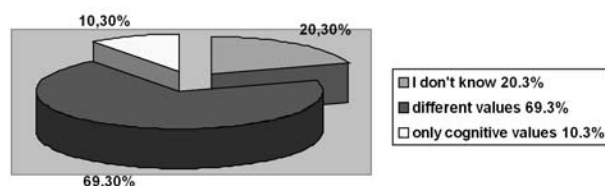
Figure 4. What values, in parents' opinion,
should be promoted in education?

Answers provided by the parents were diverse.
Part of the them claimed that at school attention
should mainly be paid to cognitive values (32 per-
sons, which constitutes 10.3% of all respondents).
In that group of respondents there might be noticed
opinions that "at school a child should most of all
acquire knowledge", yet most of these parents were
enumerating different values (215 persons –
69.3%). In contrast, 63 persons (20.3%) did not
know what values should be considered in their
child's education.

Table 2 presents opinions of the parents on
what values, apart from the cognitive ones, should
be promoted in integrated education.

Table 2. Values which, in parents' opinion, should
be promoted in integrated education

Values	N
Patriotism	125
Emotionality	120
Kindness, good	116
Truth, truthfulness	110
Religious values	52
Love	39
Respect	31
Family	28
Helping other people	23
Justice	19
Health, healthy lifestyle	19
Friendliness	18
Diligence	17
Law-abidingness	15
Friendship	15
Responsibility	14
Reliability	13
Scrupulousness	11
Honesty	11
Tolerance	10
Sensitivity	9
Honor	9
Dutifulness	8
Loyalty	8
Beauty, esthetic values	7
Understanding	6
Respect to human dignity	5
Independence	5
Resourcefulness	5
Joy of life	4
Politeness	4
Courage	3
Harmony	2
Objectivism	2
Peace	2
Care over natural environment	1

As shown in Table 2, in parents' opinion the
main values that should be promoted in integrated
education apart from the cognitive ones (knowl-
edge, wisdom, cognition) include: patriotism, ho-
nesty, kindness, truth, religion, love, respect, and
family.

Another stage of the conducted survey enabled
identifying what values, in parents' opinion, are
especially emphasized at school their child attends
to.

Table 3. Values preferred by school (in parents'
opinion)

Values	N	%
Cognitive values	211	74.6
Moral values (good, honesty, justice)	107	37.8
Religious values	53	18.7
Personal values (abilities, developmental tendencies)	51	18
Social values (patriotism, independence, law-abidingness)	51	18
Vital values (health, strength, psychical balance)	34	12
Esthetic values (beauty, nobility, tragic nature)	20	7.1
I don't know	8	2.8

Data collected in Table 3 indicate that parents
are of the opinion that at school attended by their
children the greatest attention is paid to cognitive
values, followed by moral and religious ones.

It has been assumed that while raising their
child the parents did not pay much attention to
some values promoted by the school. Therefore,
Table 4 presents values preferred by school and
not taken into account by parents in children up-
bringing.

Table 4. Values promoted by school that were
not considered by the parents in the
upbringing of their children

Values	N	%
Cognitive (cognition, knowledge)	20	6.5
Moral (good, honesty, justice)	9	2.9
Esthetic (beauty, nobility, tragic nature)	70	22.6
Personal (abilities, developmental tendencies)	26	8.4
Social (patriotism, independence, law-abidingness)	41	13.2
Vital (health, strength, psychical balance)	17	5.5
Religious	4	1.3
There are no such values	20	6.5
I don't know	103	33.2

Part of the surveyed parents did not know if
there were any values that they had not considered
in their child upbringing (103 persons, which con-
stitutes 33.% of all respondents). The parents ad-
mitted that the values most frequently neglected in

the upbringing, but taken into account in school education, were: esthetic values (70 persons – 22.6% of all respondents), social values (41 persons – 13.2%), and personal values (26 persons – 8.4%).

Furthermore, the parents were asked to evaluate the effect of integrated education on development of desired values in their children.
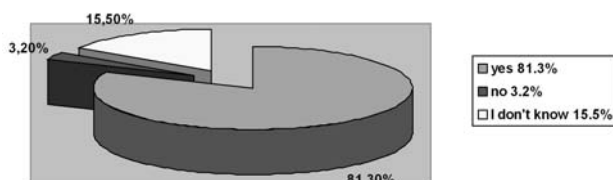

Figure 5. Did integrated education affect positively the development of desired values in child (in parents' opinion)?

As show in Figure 5, most of the parents (252 persons, which constitutes 81.3% of all respondents) were of the opinion that school education affected positively the development of desired values in their child. In turn, 48 persons (15.5%) held no opinion on that matter, whereas as little as 10 persons (3.2%) claimed that school education had not impact on developing desirable values in their children.

Of great importance is also identification of values developed, in parents' opinion, in their children since they have begun attending school. Table 5 presents the list of values developed in children at school.

Table 5. Values developed in children at school (in parents' opinion)

Values	N	%
Cognitive (cognition, knowledge)	242	78.1
Moral (good, honesty, justice)	101	32.6
Esthetic (beauty, nobility, tragic nature)	48	15.5
Personal (abilities, developmental tendencies)	114	36.8
Social (patriotism, independence, law-abidingness)	98	31.6
Vital (health, strength, psychical balance)	73	23.5
Religious	86	27.7
TOTAL	310	100.0

The greatest group of the parents surveyed is of the opinion that the values developed in their children since they started attending school were cognitive values (242 persons, which constitutes 78.1% of all respondents), followed by personal values (114 persons – 36.8%) and moral values (101 persons – 32.6%). The least number of parents pointed to esthetic values as being developed in their children at school (48 persons – 15.5%).

The teaching of values cannot consisting in imposing these values to children. Of crucial significance seems, therefore, to be the problem of transfer of values. Hence, the parents were asked how, in their opinion, pupils are learning values at school. Table 6 presents answers provided by the parents.

Table 6. Transfer of values in integrated education (in parents' opinion)

How is a child learning values at school?	N	%
Through information on how a person should behave	156	50.3
Through the example of significant persons	58	18.7
Pupil, supervised by a teacher, is trying to recognize, understand and accept some values	176	56.8
Through other forms	9	2.9
I don't know	14	4.5
TOTAL	310	100

Over half the respondents (176 persons, which constitutes 56.8% of all respondents) think that, under supervision of a teacher, their children are trying to recognize, understand and accept some values. In turn, 156 persons (50.3%) are of the opinion[1] that the most frequent method of conveying values at school attended by their children is showing how to behave.

Conclusions

1. The parents surveyed are of the opinion that both parents, teachers and educational programme are responsible for developing desired values in children.

2. According to the respondents, integrated education should promote the following values: patriotism, honesty, good, truth, religion, love, respect, and family.

3. The parents claim that at school their children are attending to, the greatest emphasis is put on cognitive values, followed by moral and religious ones.

4. The parents admit that the values most frequently neglected in upbringing but developed in school education are: esthetic values (70 persons – 22.6% of the respondents), social values (41 persons – 13.2%) and personal values (26 persons – 8.4%).

5. Most of the parents (252 persons – 81.3%) are of the opinion that school education affected positively the development of desired values in their children.

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[1] a similar observation was made by Z. Matulka, *Przekazywanie wartości w procesie edukacji szkolnej.* „Edukacja i Kultura", 1998, no. 1(23), pp. 12-14.

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Tamara Zacharuk

CHRISTIAN PERSONALISM AS A FOUNDATION FOR INCLUSIVE EDUCATION

Key words: personalism, Christian personalism, inclusive education

In contemporary pedagogy, there are many directions, trends, ideologies and orientations. For inclusive education, the best foundations are laid by the philosophy of, mainly Christian, personalism. This is because it specifically deals with man's upbringing, self-formation and development throughout the entire life. It is, moreover, extremely useful for practically oriented pedagogy.

While presenting Christian personalism as a foundation for philosophical inclusive education, it is necessary to present a few comments on personalism itself. It is a trend in contemporary philosophy expressed in a full affirmation of a person and their good. It is defined as "the basis or doctrine which places the basic value of a human being over all reason of state, economic interest or any other impersonal institution. (…) Personalism is a social doctrine, whose foundation (…) is the respect for the human being. (J. Didier, 1992, p. 250). While defining personalism, J. Galarowicz (1992) examines it in the wider or narrower sense. In the wider sense, it is "every philosophical direction promoting autonomy of a human being against social and material conditions, towards the system and objects as well as its primacy (priority) over them. In the narrower sense, it is one of the contemporary directions in Christian philosophy, initiated before WWII by Mounier in France, and developed in Poland, among others, by Karol Wojtyła." (J. Galarowicz 1992, p. 684). However, J. Homplewicz believes that personalism is a direction of philosophical thinking "which so fully and consistently exposed the value of man, his person and personality, and development that made personality the basic, autonomic value and the purpose of all activities" (J. Homplewicz, 1996, p. 106).

The term of personalism has been referred to many directions, to transcendental, existential and atomistic philosophy as well as to phenomenology, which in various ways developed and interpreted the problems of a human being, favoured personal autonomy, dignity, and the ability to go beyond nature and history. Personalism emerged in the 19th century, and

developed as a separate direction in the late 19th and early 20th century. However, certain elements of that type of philosophy go as far back as the ancient times. One may find them in the works of the sophists and Socrates, in medieval Christian philosophy, *e.g.* St. Thomas Acquinus, in the modern philosophy of R. Descartes or G. Berkeley, and later in German philosophy, as well as in the 19th-century French and American philosophies.

W. Granat (1985) points out that when we meet with various descriptions of personalism, we come across various labels, which are ascribed to it, *e.g.* personalism may be idealistic, panpsychical, dualistic, critical, monadistic, phenomenological, pantheistic, relativistic, absolutistic. Other accepted divisions include personalism that is metaphysical (W. Stern), ethical (N. Hartman, I. Kant), socio-moral (E. Mounier), religious (M. Scheller, D. Bonhoffer), philosophical (W. Stern, M. Buber,) and theological (E. Schillenbeeckca). (after: W. Granat, 1985, p. 76). Such diverse descriptions of personalism prove how hard it is to determine its common, strict perspective. One generally recognised distinction is between personalism as an attitude towards oneself and other people and personalism involved in a specific philosophy or religion.

In Poland, personalism rather refers to the traditionally Christian philosophy of a person, emphasising the exceptionality of a person among beings. The Polish Christian personalists include: K. Wojtyła, M. A. Krąpiec, T. Styczeń, M. Gogacz, J. Tischner, S. Grygiel, Cz. Bartnik, W. Granat.

S. Palka (1999) analysing the trends that have the word "personalism" in them indicates that on the basis of practically oriented pedagogy, one may perceive personalism:

o Very widely:

– placing pedagogic personalism according to L. Chmaj (1963) in the trend of naturalistic and liberal pedagogy, connected with the movement of "the new upbringing" and "the work schools" as well as associating it with the concepts of practical solutions of such foreign educationalists as: O. Decroly, M. Montessori, H. Parkhurst, C. Frienet, and Polish educationalists: J. Korczak, M. Grzegorzewska, H. Rowid,

– connecting personalism with the acceptance of the premises of independence of phenomena from the humane world and cognition in relation to the natural world and natural cognition. This trend was presented abroad by: W. Dilthey, W. Windelband, and H. Rickert, and in Poland by: S. Hessen and B. Nawroczyński, Z. Mysłakowski, B. Suchodolski

– connecting personalism with contemporary alternative humane pedagogy *e.g.* antipedagogy (E.v. Braunmuhl, H.v. Schonebeck) as well as trends referring to contemporary humane psychology (C. Rogers), to

critical philosophy (H. Gadamer), to the philosophy of dialogue (M. Bubera)

  o Specifically, in the manner narrowed to one doctrine, exemplified by attempts to apply the premises of Christian philosophy of personalism to pedagogical practice.

The latter approach narrowed to the premises of Christian personalistic philosophy and its applications in the practice of inclusive education is examined in this part of the work.

Christian personalism is a trend in Christian philosophy, which was developed in the 20th and the early 21st century. It stresses the personality of God and preaches superiority of a human being over historical and socio-economic circumstances. Christian personalism is described as "a set of philosophical and religious directions that accept the good and development of a human being as the main principle, they recognise its special value and role as a being that goes beyond nature and history, preach the primacy of personal values over other values as well as treat development of a human being as source and purpose of individual and social life" (Z. Drozdowicz, 1992, p. 248).

In the 20th century, a special role was played by two varieties of Christian personalism: neotomistic personalism according to J. Maritain and personalism of social commitment according to E. Mounier. "Both trends emerged in a perspective of Christianity as attempts to formulate answers to questions regarding human condition in contemporary, socially and politically diverse world, regarding the place of Christianity and the Church in it, as well as regarding the form of its activity, and also as an attempt to establish perspectives of development for Christian thinking towards the achievements of contemporary philosophy" (Z. Drozdowicz, 1992, p. 248).

The starting point for J. Maritain's personalism is the concept of the human being. Its ontological foundation is the general premises of tomistic metaphysics. For pedagogy, particularly for inclusive education, it is important how J. Maritain perceives man. Well, he perceives man as a complex being, whose key elements are the soul and the body. These create one ontological unity of *compositum humanum*. Man is a person due to the fact that he exists as spiritual beings do. As a person, man "takes a distinguished place in the universe, exceeding all its elements, which are instrumental in character and serve auxiliary functions in personal self-fulfillment. As a person, man goes above nature, but at the same time is an individual who connect with nature". (Z. Drozdowicz, 1992, p. 249).

In Mounier's personalism, one may notice considerable eclectics. The author often tries to synthesise various, often contradictory threads. Just as in other variations of personalism, for E. Mounier the most important con-

cept is the indefinable concept of "person". "The person is based on the lasting of the soul, which makes the person dependent on God (there is no personal life without God) and that makes the person autonomic towards the world, but at the same time the world is an area where personal life may be fulfilled, a divine act of creation places it in a specific reality" (Z. Drozdowicz, 1992, p. 252). According to E. Mounier, the person is a presence rather than a being, it exists as a gift and as a task, which confirms itself among the phenomena of the real world in activity and in communication with other people, in a protest against the impersonal world.

Christian personalism is involved with people's outlook on life. According to J. Mouroux (1953), "Man is destined to live in two universes; submerged in realities that the world both lives in among objects and (personal) beings, connected with other persons, develops his activity at work, in thinking and in love. Moreover, man is obligated to live among divine objects: Christ is present inside that world and his soul, in order to introduce us to the community of God's people and reward him in God. Man should breathe in eternity and in time at the same time" (after: W. Granat, 1985, p. 78).

The principle of Christian personalism emphasises dignity of a human being and constitutes a source of other principles. "Man is supposed to be the end, and never the means; the subject – never the object, a starting point – never a stop on the way to the finish – in all spheres of social and national life. Respect for man, for every man, and for his dignity should be a basic criterion for solving all kinds of problems. This is because no shared or common good may exist, whose foundation would not be the good of a human being – the good of a specific man." (A. Wuwer, 2006).

In the social teachings of the church, a particular significance for justifying the promotion and development of inclusive education can be found in the views expressed by Pope Paul VI, who emphasises in his *Octogesima adveniens* Epistle that the human being should be the principle, the subject and the end of all pursuits and social activities. And in the *Populorum progressio* encyclical, he distinguished man's right to the integrally understood intellectual, moral, religious and physical development. According to Paul VI, man, apart from his right to full development, is simply obliged to it: "the development of a human being is not left to man's free will. (...) The development of a human being epitomises in it all our obligations" (Paul VI, n. 5.). Man's right to the integral development is exercised through inclusive education, providing all students with the conditions to exercise their right to education.

Also in social teaching, John XXIII in the *Pacem in terris* encyclical of peace between all nations, based on truth, justice, love and freedom, often called a catalogue of man's rights and responsibilities, emphasises that the

foundation of man's rights is the dignity of a human being. The Pope enumerates the rights: to live as well as to enjoy dignified living standards, to use all moral and cultural values, to worship God in compliance with what their righteous conscience, to freely choose their status and to freedom of family life, the right in the sphere of economics, to associate, to emigrate and immigrate, to participate in public life and to protect their rights. (W. Piwowarski, 1993). For the inclusive education, the most important thing is to emphasise the right to live, which entails the execution of the remaining rights. It is necessary here to highlight that this right is very universal, and is more than imposing views by Catholics on those who do not believe.

Moreover, a wide justification for inclusive education can be found in the works of Pope John Paul II. According to John Paul II "Protection of the absolute sanctity of the unborn life is part of protection of human rights and human dignity" (1982, p. 299). In the *Evangelium vitae* encyclical he writes that "every man (...) from their conception until their demise (...), each human being has the right for absolute respect for that basic good. The recognition of that right constitutes the foundation of coexistence between people as well as the existence of the political community" (1995, s. 5).

In compliance with the Pope's message, "Children are not a burden for the society, not a tool for obtaining profit nor are they persons deprived of any rights; they are important members of the human community, a specific embodiment of its hopes, expectations and capabilities" (1999, s. 18). The Pope devotes a lot of attention to the fact "that each child has the right to develop in a normal healthy way on the physical, intellectual, moral, spiritual and social plates in the conditions of freedom and dignity" (1982, p. 92). These elements are provided by inclusive education, which assumes that every child is to be accepted as a student of a public school in the atmosphere of freedom and dignity.

The formation of a fairer world, as envisaged by John Paul II, is connected with making efforts to ensure there are no children that are undernourished, or deprived of education and upbringing (1982, p. 219). M. Śnieżyński (2003) points out that John Paul II strongly emphasises that „Upbringing serves the purpose of "humanising" man, in the particular sense of this word. Man, being one from the very first moment of his conception in the mother's womb, gradually learns how to be man – and this basic knowledge is identified with upbringing. The child is the future of their family and the entire mankind – yet man's future is inseparably connected with upbringing" (John Paul II, 1988, p. 28).

According to K. Wojtyła, upbringing is always focused on man and his good. "It is a creation of the most personal nature – what may be brought up

is a human, whereas animals may only be trained – and at the same time it is a creation in an absolutely human material: everything that naturally comprises man's upbringing constitutes a material for educators, a material which should reach for their love" (K. Wojtyła, 1962, p. 54).

Inclusive education points out that the pupil should be treated as a subject, not as an object. Karol Wojtyła (1962) very clearly highlights the common principle of personal subjectivity. It is being accomplished according to the inclusive approach, in which a child is not treated as a means to reach the end, but is the end in itself. "The essential value and personal dignity of each man never change, regardless of however specific the circumstances of its life. Man, even if seriously ill or unable to perform more complex actions, always remains a human, and never becomes >>a plant<< or >>an animal<< (John Paul II, 2004).

Inclusive education is practically implementing the Church's concern "to make human life more and more human, to ensure that everything that comprises life was adequate to the true dignity of man" (Redemptor hominis, 15).

"This dignity of a human being extends to include and refer to each individual, also to those disabled physically or mentally: (...) From the moment of conception, and later from birth, man is destined to fully express humanity, to make it happen. This refers to all people, including those chronically ill and underdeveloped. To be human is man's basic vocation: to be human so as to match the gift that was granted to him, to match the talent that is humanity and then to match all the talents which were granted to him." (John Paul II, 1994, p. 27).

Personalistic philosophy has its place in the contemporary ideology of Christian upbringing. What may serve as an example is the views of Kunowski, who believes that personalism "consists in emphasising man's great dignity and value as a person, i.e. a naturally free and rational being, not only an adult male, but also a female, a child, a disabled or handicapped person, for the price of the human soul, which exceeds in value all other treasures" (Z. Kunowski, 1993, s. 101).

Personalistic pedagogy is developed on the basis of personalism. To implement inclusive education it is important to recognise the achievements of personalistic pedagogy. These are contained in the main theses of personalistic pedagogy, presented by M. Nowak (2003, p. 246-247):

- upbringing is understood as an important factor (element) of the effort to promote "*universum personal*" or "the community of people";
- the highest purpose of upbringing is to enable to subject (the pupil) to take control of their own process of development;

- upbringing is understood as "maieutics of a person" (to inspire a person in the pupil);
- the pupil is not perceived as an object or thing to be filled with anything, neither is he or she a being to be trained, but a person who has to be "inspired" in them;
- the pupil is the first and basic factor in upbringing, the educator is only a co-operator in this process; this is the position that very clearly emphasises the realistic character of the educational relation, which definitely opposes the perception of it in idealism;
- essentially, there is support form the aspirations manifested in the movement of so-called new schools, in which mistakes are also noticed in the form of, for instance, naturalistic reductionism and (as previously indicated by E. Mounier), individualistic optimism originating from the liberal and bourgeois movement;
- as a person, the pupil neither belongs to the family not to the state, an no one holds any right to them for any reasons;
- The importance and the role of school is recognised, and its goals are indicated next to those of other educational institutions; the relation is emphasised between education and upbringing, the concept of "neutral school" is examined and rejected;
- School education should focus on "integral humanism", *i.e.* not only literary or artistic, but also scientific and technical;
- The educational function of the family is reinforced and defended, yet without overlooking the signs of crisis that the family is facing; threats are recognised connected with authoritarianism that may occur in family upbringing;
- The respect for "the mystery of the child" is emphasised (which is all the more possible when the climate of faith is accepted and when one opens themselves to transcendence). The child becomes a person under the influence of various stimulants from various educational institutions.

According to B. Śliwerski (2005), personalistic pedagogy is an important trend in contemporary pedagogic reflection. The reference point here is the concept of the world and man, which accepts the mutual dependence of indeterminism, freedom and transcendence. Epistemologically, the author treats personalistic pedagogy as a concept of upbringing based on the cognitive theory, which considers various degrees of cognition, while assuming the principle of the basic homogeneity of human cognition, able to search for the truth.

"The theoretical reflection sees its specific goal in personalistic pedagogy as being a kind of critical awareness in relation to pedagogy and upbringing.

For these reasons, personalistic pedagogy enters the discussion on pedagogy to protect the rights and dignity of a person on the one hand, and to point out to and warn against various claims that appear in pedagogy, and to assess their weight"(.B. Śliwerski, 2005, p. 246).

Moreover, what is the perfect source that justifies the implementation of inclusive education is the Christian personal and existential pedagogy based on Christian personalism. For inclusive education, it is important to be close to the other person. J. Tarnowski calls the pedagogy of being close to the other person the pedagogy of the future. J. Tarnowski's pedagogic motto (2001) justifies inclusive education, which comes down to five principles and dispels the following dilemmas:

1. As the starting point. In the first contact with the pupil or group, it is paramount to enter their world with genuine and authentic interest and a friendly attitude. The educator should adopt the point of view of the pupils met, to ensure they feel his respect and to avoid any incorrect moves towards them.

2. The pupil is not inferior to or less valuable than the educator, but on the contrary, he or she may, in many respects, be superior. We are not there to judge them. Any faults that we discover must not be associated with the specific pupil. One should always find the image of God in them, who loves and forgives.

3. The relation between the educator and the pupil. The educator should consistently aim at friendship, but must not expect gratitude or affection. The pupil should be made to feel love, but without obscuring the one who loves them far more: Jesus Christ. The factor that connects and bonds them is the prayer.

4. The process of upbringing. Listening to the pupil. Learning from and educating each other. Not imposing anything, but a subtle assistance to incite interest in and the search for the values leading us to the meeting with God in Christ thanks to the grace of the Holy Spirit. Hoping for a distant future rather than expecting immediate results. Constant patience and the atmosphere of joy.

5. The objective. To help the pupil find their place in life and their personal vocation in gradually approaching human and Christian maturity. Along with the process of upbringing of others, aim at self-improvement and living with Christ.(after:, J. Tarnowski, 2001, p. 73).

The ideas of Christian personalism are closely connected with pedagogic practice as well as man's life and development. They are very important from the point of view of inclusive education discussed here, which provides autonomy for disabled people. After all, in Christian personalism the basic category is the person. F. Adamski claims that "the value of a person is

special: we educators describe it as >>autonomy<< of a human being – it only exists because it is independent of others. Hence the relations between persons are in fact the relations between being who are equal in their dignity and freedom" (F. Adamski, 1993, p. 12).

Abstract

The ideas of Christian personalism are closely connected with pedagogical practice, man's life and development. They are very important from the point of view of inclusive education, which provides autonomy for disabled people.

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KEY COMPETENCES AS A WAY TO CREATIVE DEVELOPMENT

Key words: key competences, creativity, development, project

Many specialists, representing such fields as sociology, pedagogy, philosophy, psychology and economy, have undertaken attempts to define the notion of competences. Their efforts were determined by educational, cultural and linguistic context. As M. Romainville reminds us, the French term *compétence* was originally used in the context of vocational education, to define abilities to perform a given task. However, during the latest a few dozen years, this term has settled in general education, where most frequently it relates to "abilities" or "potential" of an individual to act effectively in a specific situation. What is important is not only the knowledge itself, as the ability to apply it. For P. Perrenoud, teaching of competences means allowing an individual to mobilise and apply the acquired knowledge in complex situations that are diversified and unpredictable. He proposes the following definition of competences: "ability to act in many specific situations, ability based on knowledge but not limited to it". After analysing many definitions of the notion of competences, F. E. Weinert concludes that in many disciplines, the notion of competences is interpreted as "a roughly specialised system of abilities, proficiencies or skills that are necessary to reach a specific goal". During the symposium of the Council of Europe on competences, J. Coolahan proposed to understand the term "competence" or "competences" as "general abilities (capabilities) based on knowledge, experience, values and dispositions which a person has developed through engagement with educational practices". (Definitions quoted after the European Office of Eurydice).

Key competences include:
1. Communication in the mother tongue This is an ability to express and to interpret ideas, thoughts, feelings, facts and opinions in speech and writing (listening comprehension, speaking, reading and writing) and to interact linguistically in an appropriate and creative form in the full range of societal and cultural contexts – in education and training, work, home and leisure.

2. Communication in foreign languages. It is based considerably on the same dimensions of abilities as communication in the mother tongue – on the ability to understand, to express and interpret ideas, thoughts, facts and opinions in speech and writing (listening comprehension, speaking, reading and writing) in an appropriate range of societal and cultural contexts (in education and training, work, home and leisure), depending on wishes or needs of a given person. Communication in foreign languages also requires such skills as mediation and understanding of cultural differences. The degree of language proficiency of a given person can be different for four linguistic competences (listening comprehension, speaking, reading and writing) and for individual languages, and it depends on societal and cultural personal context, environment and needs or interests of a given person.

3. Mathematical literacy and basic competences in science and technology. Mathematical competences include the skill of developing and using mathematical thinking in order to solve problems emerging in everyday situations. Process and activity are equally important as knowledge, whereas the basis is an appropriate proficiency in the computational skills. Mathematical competences involves – to various extent – the ability and willingness to use mathematic methods of thought (logical and spatial thinking) and presentations (formulas, models, constructs, charts and tables). Scientific competences relate to the ability and willingness to use the existing body of knowledge and the methodology to explain the natural world in order to formulate questions and draw conclusions based on evidence. Technical competences are viewed as the application of this knowledge and methodology in response to perceived human needs or wants. Competences in science and technology include understanding of changes caused by human activity and responsibility of individual citizens.

4. Digital competences. They include efficient and critical application of information society technologies (IST) for work, leisure and communication. They are based on basic skills in information and communication technologies (ICT): using computers to obtain, assess, create, present and exchange information and to communicate and participate in cooperation networks via Internet.

5. Learning to learn. This is an ability of consistent and determined learning, organizing one's own process of learning, including effective time and information management, both individually and in groups. This competence includes awareness of one's own process of learning and needs in this area, identifying available possibilities, and the ability to overcome obstacles in order to achieve success in learning. This

competence means acquiring, processing and assimilating new knowledge and skills, as well as looking for hints and using them. Learning-to-learn allows people to acquire the skill of applying previous learning experiences and general life experiences in order to use and to apply knowledge and skills in various contexts – at home, at work, as well as in education and training. Key factors in developing this competence in a given person include motivation and confidence in one's own capabilities.

6. Social and civic competences. They include personal, interpersonal and intercultural competences, involving a full range of behaviors that prepare people for efficient and constructive participation in social and professional life, particularly in societies characterized by increasing variety, as well as conflict solving, if necessary. Civic competences prepare a person for full participation in civic life, basing on knowledge of social and political concepts and structures, as well as a disposition to active and democratic participation.

7. Sense of initiative and entrepreneurship. They indicate an individual's ability to put ideas into action. They include creativity, innovation and risk taking, as well as ability to plan and implement projects in order to achieve intended aims. They support individual persons, not only in their private and social life, but also in their workplace, helping them to obtain awareness of the context of their work and ability to take advantage of opportunities; they are a foundation for more specific skills and knowledge needed by those who undertake social or commercial ventures or who participate in such projects. They should include awareness of ethical values and promote good management.

8. Cultural awareness and expression. Appreciating the importance of creative expression of ideas, experiences and feelings through a range of means of expression, including music, performing arts, literature and visual arts.

9. Key competences are regarded as equally important, since each of them can contribute to successful life in knowledge society. Many of those competences partially overlap and are interrelated, aspects that are essential in one field support competences in the other. Good command of basic language skills, reading, writing, calculating and skills in information and communication technologies (ICT) form the basis of learning, while learning-to-learn supports all other educating activities. Some issues can be applied in all elements of the reference framework: critical thinking, creativity, initiative, problem solving, risk assessment, decision taking and constructive management of emotions are important in all eight key competences.

On 18 December 2006, the European Parliament and the Council issued Recommendation on key competences for lifelong learning. Subsequently, on 28 September 2007, the European Commission issued a decision to implement the Human Capital Programme, one of programmes intended for implementing the National Strategic Reference Framework 2007-2013, covering the entire intervention of the European Social Fund (ESF) in Poland. The approval of the Programme is a confirmation of the main directions of developing and conducting employment policy of the government, and allows using the ESF funds in Poland in 2007-2013. The Programme is a response to challenges which the revised Lisbon Strategy poses on EU member states, including Poland. Those challenges include development of knowledge and innovations. Striving towards effective development of human resources, the Programme provides a focused support among others also in the field of education. One of the strategic aims of the Programme is to spread education of the society at each stage of instruction, while improving the quality of educational services and relating them more closely to the needs of knowledge based economy.

It should be said that the last decade brought a series of important changes in functioning of the education sector and in educational attitudes of Poles. Many of those changes were positive and contributed to a significant growth of investments in human capital. Also, we can identify a range of issues which the system of education is facing.

One of them is the quality of services offered by the education system. The problem of diversifying the quality of educational offer emerges on all levels of education, including an offer of life-long learning. This issue is demonstrated by differences in students' achievements, which on one hand show differences between the town and the country, and on the other – disproportions between regions. This differentiation results in low achievements of Polish students in the PISA tests in reading comprehension and mathematic thinking. The first test, in 2000, was taken by 265,000 students of 32 countries. Polish students ranked quite low, on the 24th place. In tests organized in 2003 (275,000 students from 42 countries), students from Poland achieved a better result in reading comprehension (improvement from 479 to 500 points), but mathematic skills remained at the same, quite low level. Subsequently, in 2006, out of 57 countries participating in the test, Polish students came in the 20th place (21st in mathematics).

Another problem is disproportions in the access to extracurricular classes. Extracurricular classes in schools have a rich and long pedagogical tradition in modelling and developing interests, in promoting talented students, helping students with learning difficulties, organizing preventive activities and those related to the choice of a carrier path. In the 1990s, the

number of extracurricular classes significantly dropped, as well as the number of participating students, e.g. in the school year of 1999/2000, these classes were attended by 34.7% of the total number of students. Although the number of those classes began to systematically grow, and in the school year of 2005/2006 even 61.4% students participated in extracurricular classes, still as regards access to extracurricular classes, the following theses can be formed:

- Teachers often conduct those classes on a voluntary basis (lack of means from the state or local government budget) or they are financed through payments made by parents (which eliminates students from families of weak financial position);
- Instructors often do not take into consideration students' needs, they base their work on forms, work methods and teaching aids which do not require any financial expenditures; in some environments (rural, economically neglected) those classes are completely inaccessible.

The needs in the area of extracurricular classes concern mainly:

– Equalization of educational chances for students from rural areas, who commute to schools, students from poor (unemployed) families, disabled, showing aptitudes and interests;
– Providing preventive care for students at risk of addiction and social pathologies and students with learning problems, who require reinforcement in preparations for further employment, in functioning within a social group.

Therefore, pursuant to the Recommendation of the European Parliament and of the Council of 18 December 2006 on key competencies in the process of life-long learning, the Academy of Podlasie in Siedlce in the partnership with the Foundation for Lubelskie Development and in the cooperation with the Paweł Włodkowic Higher School in Płock began in September 2008 implementation of the Project entitled "Key competences as the way to creative development" Contract No. UDA-POKL.03.03.04-00-046/08-00, co-financed by the European Union from the European Social Fund (Human Capital Operational Programme, Priority III, High quality of the education system, Action 3.3 Improvement of educational quality, Sub-activity 3.3.4 Modernization of the content and methods of educations). The project will last four years, *i.e.* to 31 August 2012.

The general aim of the project is to:

1. Increase, among students of primary schools, the level of key competencies as regards cultural awareness and expression, mathematical and technical skills, and communicating in foreign languages (particularly in the area of technology and mathematics);

2. Create possibilities of comparing achievements of students and student groups at regional and interregional events.

Detailed objectives of the project include:
- Increasing the level of students' knowledge and skills in mathematical and technological competences, which will bring about an expected improvement of test results by two stanines;
- Increasing the level of students' knowledge and skills in competences of communicating in foreign languages – both in the area of technology and in the area of communication, improving students' cultural awareness and expression;
- Improving students' creative activities in the areas of designing and presenting of projects, developing skills of overcoming fear and nerves;
- Increasing the level of students' knowledge about other regions of Poland;
- Increasing the level of the knowledge on methods of developing key competencies among staff in primary schools (headpersons, teachers) and representatives of managing authorities;
- Raising teachers' qualifications in the field of applying active methods in classes.

Although the Recommendation of the European Parliament and of the Council refers to eight competencies, the project under discussion develops three of them:
1. Communication in foreign languages,
2. Mathematical literacy and basic competences in science and technology,
3. Cultural awareness and expression.

Development of mathematic competences was induced first of all by poor results achieved by students in PISA tests. On the other hand, taking up the issue of technical competences was justified by the lack of a uniform concept as regards teaching this subject. The difficulties in developing such a uniform concept of teaching are accompanied by fast development of technology and constantly changing needs. Development of technical competencies is possible from early school education. This is proved by an effective way children handle modern technical devices. In the project, this competence (just like others) is developed in students of the 5th and 6th grades of primary school, and this action is carried out at the same time in Polish and in a foreign language. The purposefulness of developing these competencies in children under 12 years of age is confirmed *e.g.* by special university classes organized for children, conducted currently at the universities in Warsaw and Cracow. Introduction of mathematical and technical

competences into the project in combination with the development of communication in a foreign language is a new proposal, justified by a more successful motivation for children to learn a foreign language. Development of the competence of communicating in foreign languages was noticed in course of developing core curriculum for primary schools, which was reflected in the number of hours devoted to teaching of a modern foreign language (since 2008, also in integrated learning). In the project, this competence is not developed in the form of additional lessons, but through practical communication in a foreign language in the area of technology and mathematics during extracurricular classes. Development of technical competences is realized through a project method. In order to emphasize interregional features of the project and to make it more attractive, provincial and interregional mathematical and technical contests will be organized. Such contests will involve presentation of technical concepts, also in a foreign language. On the other hand, the interest in the issue of competences in cultural awareness and expression resulted from the fact that the level of cultural awareness and expression among children from rural areas and small towns is low. This is indicated, *e.g.* by the results of the conference of the Culture and Media Committee, organized in 2003. Differences concerning access to cultural values in big cities and in rural areas are huge. In the project, this competence is developed in two directions: through active tasks, giving children the possibility of developing creative skills, and by facilitating their participation in theatre performances and cultural events. Development of children's knowledge and creative skills will be completed by events, organized at the provincial and interregional level, aimed at presentation of their work and comparing it to the work of their peers.

Project participants include students of the 5th and 6th grades of primary schools from rural areas in the provinces of Lublin, Masovia, Podlasie and Warmia and Mazury, where stanines in competence tests were very low in recent years. Those relatively low results achieved in the test in the national scale were the reason behind the choice of provinces. Students from these provinces need support in developing key competences, but without activities financed from EFS, they have no chances to obtain such support. Implementation of the project for students of those schools is an effective response to poor results obtained in the mathematical part of the above mentioned PISA tests. It will contribute to practical use of a foreign language (learning through project activities), as well as to conscious and free cultural expression and reception of arts through children's own presentations and participation in cultural events. The project, in each of its elements, determines implementation of activities and interregional themes (all tasks of a horizontal nature), *i.e.* common tasks for all provinces, creating projects

which take into account features of other provinces, events and initiatives allowing other regions to participate, *etc.*

The project is intended to support students of the 5th and 6th grades, teachers and headpersons of selected schools, in the following amounts:

> ➢ Masovia Province: 1800 students of 30 forms (15 schools x 3 intakes of 600 students each), 15 headpersons and 75 teachers;
> ➢ Lublin Province: 1200 students of 20 forms (10 schools x 3 intakes of 400 students each), 10 headpersons and 50 teachers;
> ➢ Podlasie Province: 1200 students of 20 forms (10 schools x 3 intakes of 400 students each), 10 headpersons and 50 teachers;
> ➢ Warmia and Mazury Province: 1200 students of 20 forms (10 schools x 3 intakes of 400 students each), 10 headpersons and 50 teachers.

Totally, the project will include 5400 students of 90 forms, from 45 schools, 45 headpersons and 225 teachers. Indirectly, the project will involve a few dozen of representatives of school managing authorities.

Recruitment to the project began by sending information kit to schools and managing authorities, containing a description of the project and an invitation to participate in the procedure of selecting schools interested in developing selected competences. Invitations were sent to those schools that:

a) obtained the lowest results in tests of 2007 and 2008 (stanines 1, 2, 3, 4),
b) are located in rural areas (villages and towns below 25,000 inhabitants).

In response, schools were asked to prepare proposals for their participation in the project, containing:

a) a recommended method of developing three competences with justification of the need to conduct additional classes;
b) general information concerning the situation of the school: number of the 5th and 6th grades, number of teachers of such subjects as mathematics, technology, foreign languages, music, arts, and their interests in additional classes;
c) information concerning students' and their parents' declaration to participate in the project.

90 forms were selected on the basis of established criteria, pursuant to the accepted structure of the number of participants in the project. Recruitment ended with signing a contract with the school, which specified mutual obligations and methods of project implementation. School ensure participation of students in classes and provide classrooms, and the supervisor of the project – development of three key competences, pursuant to the description presented in the application. The contract also included informa-

tion, confirming the approval of the Board of Teachers or of the School Council for the school to participate in the project.

The project includes eight actions:

Action 1. Project management. The following functions were created for project management: project director, operating coordinator, reporting and accounting specialist, financial expert, and project assistant.

Action 2. Monitoring, evaluating and testing competences. The process of monitoring, beside involvement of specialists, uses an IT system (MIS), which monitors hard indicators of the project, *i.e.* training sessions of headpersons and teachers, competence developing activities, festivals and contests, *etc.* Additionally, tests measuring students' competences were conducted at their entry to the program, and after the 6th grade, competence measurement tests will be conducted at the exit. A full assessment of the undertaking will be carried out as regards the structure of competences, students, schools, regions and implementation times.

Action 3. Preparing project for implementation and promotion of the project. Recruitment and information kits were prepared and sent to schools. A program intended for preparing teachers to conduct classes and a framework programme of cyclical training workshops were developed. There were organized two-day training sessions for headpersons and 5-day training sessions for teachers dealing with competence development through active methods, particularly through project work. Headpersons participated in training sessions for teachers, for the first three days.

Action 4. Providing pedagogical and scientific guidance. The guidance is provided in two directions: by a scientific supervisor, whose task is to ensure appropriate subject-matter level of programmes intended for developing key competences and their possible modifications, and operationally, by headpersons in individual schools, through ongoing supervision over the activities. This guidance is also supported by provincial coordinators and subject-matter experts, through a regular analysis of carried out activities.

Action 5. Development of competences within KC2 – Communicating in foreign languages. Activities in this area will be carried out on the basis of prepared programmes (90 forms for 28 weeks a year, one hour weekly). This task is also combined with activity 6, described below.

Action 6. Development of competences within KC3 – Mathematical and technical competences. A test was taken by students at the entry to

the project. The results obtained will help to develop the most adequate (adjusted to the level of competences and possible gaps in competences revealed by the test) programmes for developing mathematical and technical competences, involving also the competence of communicating in foreign languages. Depending on test results, programmes will be modified and adjusted to current needs, on an ongoing basis. Extracurricular classes (90 forms for 28 weeks a year, three hours a week: 2 hours of KC3 + 1 hour of KC2) are carried out on the basis of the programmes developed. The classes will facilitate development of both communication and technical competences. Each edition of KC3 competence development begins with competence measurement at the entry and afterwards, at the exit.

Action 7. Development of competences within KC8 – Cultural awareness and expression. Activities within this competence began with a test at the entry, and after obtaining results, an adequate programme for developing competences in the field of culture and arts was prepared. The programme is used as a basis to conduct extracurricular classes (90 forms for 28 weeks a year, 2 hours a week). Awareness and cultural expression will be deepened through implementation of projects in this area and by providing educational services, such as theatre performance or cultural events (two one-day trips during a school year). After two years of work, prepared projects will be presented at schools. Each edition of KK8 competence development begins with measurement at the entry and ends with measurement at the exit.

Action 8. Interregional initiatives. They include activities for each edition of competence development (a two-year cycle, three editions): two-day workshop training for 225 teachers, the aim of which is to prepare a kit of class scenarios for one semester, working out rules for provincial and interregional festivals of culture and art projects, rules for mathematical and technical contest with elements of communicating in a foreign language, as well as a set of tasks for individual stages of the contest, organizing a presentation of projects prepared by culture and art groups functioning at schools, organizing a festival of the best school projects in the province for students of the 6th grade, organizing an interregional festival for 12 best projects in the region, three for each province, for students of the 6th grade, organizing a mathematical and technical contest at the provincial level for students of the 6th grade who obtained the best results in tests carried out at the exit, orga-

nizing an interregional finale of the mathematical and technical contest for 40 students (10 per province). The action will end with a conference summarizing the project and with a publication.

Project implementation assumes obtaining hard and soft outcomes.

Hard outcomes include: three programmes for developing key competences, 225 trained teachers, 45 trained headpersons, 45 trained representatives of school management authorities, 5400 students participating in classes intended for the development of three competences, 270 educational events (theatre performances, cultural events) in order to develop cultural competences, 6 festivals of culture: 3 provincial and 3 interregional ones, 6 mathematical and technical contests: 3 provincial and 3 interregional ones, 1 publication on key competence development, 1 seminar for representatives of school management authorities, 1 conference to summarize the project. Hard outcomes will be monitored and analysed with the use of an IT system, as well as by reports, attendance lists, management and educational supervision, monitoring visits, expert assessments and project evaluation.

On the other hand, soft outcomes of the project include: developing mathematical and technical skills, which will contribute to the improvement of results obtained in the mathematical and nature part of a junior secondary school leaving exam; improving the skill of communicating in a foreign language; developing the skill of understanding culture and of independent cultural expression; improving the skill of project and team work; broadening the knowledge about regions; enhancing teaching techniques with project method and other activities aimed at competence development, making school classes more attractive. Soft outcomes will be analysed through: tests for measuring competences at the entry and at the exit, periodical analyses of changes in the range of knowledge, skills and attitudes of students; evaluation of the project in the FGI mode with the participation of project experts. These results will directly contribute to the realization of project objectives. Preparation of headpersons and teachers to conduct classes intended for developing competences among students will facilitate proper realization of planned activities, which consequently will contribute to increasing the level of key competences of students. Intensive work with students, not only in the form of school classes, but also through trips and events (on the provincial and interregional level) will provide an efficient method of working with students, developing teaching techniques and improving general attractiveness of forms of knowledge and skills acquisition by students.

Added value of the project consists in: introducing active methods – learning through actions, combining learning of a foreign language with learning of mathematics and technique, inducing interregional activity of

schools for key competence development. Added value of the project will also include preparing and implementing procedures for key competence development through organization of extracurricular classes in schools from rural areas (publication) and developing regional and interregional models for comparing achievements and sharing experiences (programmes for KC development, rules for festivals and contests, a set of sample scenarios for classes conducted with the use of active methods, research reports).

The project is compatible with the Human Capital Operational Program, Priority III, where one of the objectives is improvement of the teaching offer, implementing innovative teaching curricula (also in mathematics and technology), and developing key competences of students, which fully corresponds to the aims of the project. It is also compatible with the Action Plan for Priority III (2007-2008), where development of key competences is the objective and expected outcome of actions. It is also compliant with the Recommendation of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning.

Attainment of specific objectives will be verifiable through the analysis of the results of educational measurements and of scientific research conducted during project implementation.

Abstract

Preparation of young people to handle challenges of information society and to maximally benefit from possibilities created by this society has been included among the most important objectives in various education systems in Europe. This made politicians, dealing with education, revise the curricula and teaching methods, which consequently increased the level of interests in key competences as elements which determine the success of an individual in subsequent participation in the society.

Competences are defined as combination of knowledge, skills and attitudes appropriate for the. Key competences are those, which are needed by every one for their self-fulfillment and personal development, for being an active citizen, for social integration and employment. Eight key competences have been established:
1. Communication in the mother tongue
2. Communication in foreign languages.
3. Mathematical literacy and basic competences in science and technology.
4. Digital competence.
5. Learning to learn.
6. Social and civic competences.

7. Sense of initiative and entrepreneurship.
8. Cultural awareness and expression.

Pursuant to the Recommendation of the European Parliament and of the Council of 18 December 2006 on key competencies for lifelong learning, the Academy of Podlasie in Siedlce, in the partnership with the Foundation for Lubelskie Development and in cooperation with the Paweł Włodkowic Higher School in Płock, began in September 2008 implementation of the Project entitled „Key competences as the way to creative development", co-financed by the European Union from the European Social Fund. The project involves development of three competences:
1. Communication in foreign languages,
2. Mathematical literacy and basic competences in science and technology,
3. Cultural awareness and expression.

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ARISTOCTARS IN POWER: MAKING SENSE OF BRITISH INSTITUITONS

Key words: aristocrats, the House of Lords, reform, the Westminster model, new institutionalism

Introduction

There is an abundance of books dealing with political institutions in the United Kingdom. At an introductory level targeting mostly students, the majority of them provide information on how UK institutions operate, present their functions as well as norms and facts. At a more advanced level, political science pundits dispute amongst themselves over how British institutions are interrelated and what resulting consequences of such inter-connectedness are. What unites these various models, especially the ones meant for students of political science, is an attempt to reject the traditional institutional approach adhering to the Westminster model, with its elusive concept of dominant Commons. The practice it adheres to was more characteristic of the British parliamentary customs in the 19-century, when in between 1846-68 the Commons enjoyed authentic dominance. With time, due to the development of the party system and subsequently party government, it became more mythical than real (Norton 2006: 377). By focusing mainly on formal rules, official structures and numbers, the Westminster model disregards the broader perspectives in which institutions are imbedded concerning informal constraints, values or cultural limitations. Consequently, it has been caricatured as hyperfactual, atheoritical and too formalistic (Manin 1997; Peters 1999; Rhodes 1997; Lowndes 2002).

Although the Westminster model itself no longer provides an accurate and comprehensive account of how Britain is governed, sticking to it remains a matter of convenience. For years it appeared most appropriate when applied to parliamentary practice or the British Constitution, in itself a complex issue. It helped to avoid misunderstandings and maintain a balance between political observations and sound judgements (Johnson 1999: 131). For some, its idealised view "still best captures the institutional continuities of the UK's political system" (Rhodes 1997: 3). It also functions as an organising principle and identifies the norms and meanings which dominate British

political discourse No wonder even the greatest advocates of the present parliamentary reform have problems with discarding its main assumptions.

The rediscovery of the issue of the anachronic character of British institutions has gained in prominence ever since Margaret Thatcher initiated some institutional transformations and further still after Labour started its constitutional reforms in 1997. The formalistic accounts advocated by the Westminster model of how institutions work have simply failed to explain the complexity of the change process, which instead of a smooth progress more frequently has been brought to a standstill. The new institutional theory in its numerous variants of rational, normative, empirical and historical perspectives appears more adequate in seeking to answer not only what an institution is but how it functions in wider social, economic and political contexts (Peters 1999:11). Also, the interconnectedness of the British institutions and the importance of understanding historical trajectories provide more adequate viewpoints on institutional relationships. Likewise, constraints on culturally and historically conditioned governance seem to explain more satisfactorily intricacies and limitations of what is perceived to be a constitutional change in its subsequent phases. Approaching British institutions from such perspectives is thus more agreeable with one of the basic tenets of the new instutionalism offered by Rhodes (1997: 3), whose claim is that understanding the present day British institutional forms requires some understanding of what has gone before.

One such institution which exemplifies all the issues raised by new theoretical approaches is the House of Lords. Its ancient composition including an element of hereditary aristocracy, though limited in 1999, best illustrates the complexity and paradoxes of any analysis concerning British institutions. When the issue of reform was raised by Labour in the eighties, the chamber seemed to be an easy target. Years later the prospect of eliminating lords' privileges both in the legislative and executive areas of power is still regarded as indispensable, but not necessarily forthcoming. The present article sets itself the task of outlining the problems concerning the unfinished reform of the British upper House in the light of historical institutionalism, which addresses the real questions of the issue more satisfactorily than the normative or sociological variants. Focusing on a broad cultural perspective within which institutions work (Johnson 1999; Rhodoes 1997), on power and its asymmetrical relations reflecting inequalities of access (Hall and Taylor 1996) as well as on 'path dependency' and change resistance analyses (Pierson 2000), historical institutionalists desire to indicate the nature of difficulties lying behind any reform in the British polity.

The Lords Reform

The UK parliament represents a form of asymmetric bicameralism, which, unlike other asymmetric systems in France, Japan or Poland, where the Senate's role is subsidiary and limited, gives its upper subordinate chamber a more substantial legislative function. The Lords not only replicates the legislative role of the Commons in its five-stage processing of statutes, but initiates about one third of the parliamentary legislative bulk. Besides, the House performs some executive and judicial functions as well. It provides some of the government personnel and its law peers function as the Highest Court of Appeal (Norton 1984: 277). Having in mind the anachronic nature of the chamber itself, the question which arises is why such an anomaly has been allowed. The investigation of the issue, according to the newest analyses of some historical insitutionalists, can be best accounted for in the light of the Lords' deeply-rooted elitist experience, its interinstitutional interactions and in cultural understandings of the roles ascribed to the main British political institutions (Peters 1999: 81-2).

The House of Lords is a quaint British institution; the quaintest in the country which has turned some of its *ancien régime* institutional structures into a system of government up to the present times. Variously described as "the British Senate", "the geriatric ward of the constitution", or "the Prime Minister's poodle", the Lords manages to be regarded both as the best and the worst part of the mother of parliaments. The best because it contains expertise, wisdom and experience of its life peers: former diplomats, ministers and civil servants. Its debates are serious, often wiser and better-informed than its lower counterpart's. Yet also the worst because some of its members, especially prior to 1999, could be silly and even prejudiced if at all they chose to attend the proceedings (Norton 1984: 280).

The best and the worst of the House of Lords seem inseparable. However, there seems little logical justification for the chamber's existence in its present form and name based on past or present patronage. The consequence of the historically bound evolution of the Lords is that the peers lack any legitimate base to assert their powers, check the ruling party or take firm stands in controversial political issues. Above all, nothing explains why some of its members, namely the remaining hereditary peers, should have the right to sit in parliament just because they inherited titles, and often wealth, from their forefathers, who either faithfully administered to monarchs in the past or bought peerages from Arthur Maundy Gregory, Lloyd George's honours broker (Cook 2006: 36-7).

Little seemed to upset the dominance of hereditary establishment in the heart of the British parliamentary circles until the 90s, when the Labour manifesto envisaged a two-stage reform. The initial proposal of complete abolition of the chamber, which the party had wanted in the early 80s, had been forgotten. Instead they started to advocate an abolition of the hereditary majority first to deal with the life peers at a later time. The reasoning behind the move was clear; inheriting a seat in parliament seemed illogical and happened nowhere else in the world. The survival into the 21–century of the medieval principle of primogeniture could not be tolerated any longer. Above all, the party's manifesto aims were very much in line with the tradition of the Left, which periodically used to weaken its upper counterpart. Given that the vast majority of hereditary peers were conservatives, introducing "a more democratic and more representative" second chamber guaranteed Labour a smoother legislative process (Cook 2003: 25-6) It solved a problem which had always haunted the party: a possibility of having power without any real majority in parliament. Besides, by eliminating hereditaries, Labour achieved its aim without upsetting the traditional Westminster model's values, where the powers of the tripartite sovereignty of Crown in both Houses of parliament give the Commons pre-eminence in the British parliamentary democracy (Cm 5291 2001: paras 13-17).

By choosing to reform the Lords, rather than abolishing it altogether, Labour avoided redistribution or real radicalism so uncommon to the British tradition. They also followed the tradition of preserving institutional unity of "crown-in-parliament", whose major feature was, in accordance with the view of another historical institutionalist, Krasner (qtd. in Peters 1999: 77), a periodic "disruptive change" or "punctuated equilibrium". What the theory implies is that any change in British institutions could be seen as a periodic adjustment of the power relationship between the crown and parliament, a response to external changes in its environment. Such externally conditioned modifications, result largely from the necessity of adapting to changed economic, social or political forces in the state. Finally, by modernising rather than abolishing the Lords, the reform tied in well with another major strand of New Labour thinking; namely modernisation of state structures. Nothing thus seemed easier than to reform the upper chamber by expelling its most vulnerable part, one which very few would or could defend. The abolition looked straightforward and easy, unlikely to arouse any protest, apart from some of the hereditary peers themselves.

For a state traditionally characterised by stability and continuity of its political institutions, any change, especially a disruptive one, in accordance with Krasner's view on change (qtd. in Peters 1999: 77), would consequently lead to rationalisation of power

dependence between the crown, parliament and executive. New divisions and institutional adjustments had always been the experience of the past and nothing different was to be expected now. Besides, the promise to modernise Britain received a popular resonance during Labour's landslide victory of 1997. Modernisation, and not a complete overhaul, adhered to yet another new historicism's claim, namely that change could also be conditioned internally. In such a case it does not necessarily come forward smoothly even if strongly desired. Institutional structures become self-reinforcing in time. In an evolutionary process of institutional development, which is the experience of the British state, institutions are usually change resistant, yet they have a capacity to learn and modify their own behaviour. Such learning mechanisms can be, however, subject to considerable limitations as the right timing and sequence of events may have an impact on the institutional development. The same factors may contribute to weakening of the initial impetus or blurring the reformers' initial assumptions and objectives. This results in postponements of subsequent phases or complete inertia of the change process (Hall and Taylor 1996: 942; Pierson 2000: 490). The history of the Lords' reforming attempts seems to confirm both strands of the change thesis.

On 19 Jan. 1999, the British government issued a White Paper, *Modernising Parliament: Reforming the House of Lords* (Cm 4183) and several months later, on 11 Nov. 1999, after the bill had gone through both chambers, the House of Lords Act received the Royal Assent. It enabled a removal of all but 92 hereditary peers from the upper House. Already this provision seemed puzzling. The concession of keeping an elected representation of the hereditary peers was introduced to ensure a smooth passage of the bill (Clarke and Venning 2008: 3-4). This indeed was the case except for a few incidents. One peer died right after giving a speech defending the *status quo* of the chamber. Another, Lord Burford, regarding himself a guardian of tradition, leapt from his seat on the woolsack to shout: "No Queen, no culture, no sovereignty, no freedom! Stand up for your Queen and country!! Vote this treason down!!!" The incident was widely reported in the press. Among many condemning voices, some newspapers expressed their approval of the lord's action. One would even call him "an old-fashioned and radical eccentric in a grand English tradition" (Masters 2001: 101). The whole incident could, however, be seen as a presage of what was to follow next.

At first sight the completion of the first stage of the Lords reform apparently follows the tradition of weakening the upper chamber, which, if judged historically, seemed legitimate. Ever since Gladstone's time, the Left has sought to weaken, not strengthen the second chamber. The 1911 and 1945 Parliamentary Acts contained provisions limiting the

peers' powers of delaying and vetoing governmental bills. This way the Lords was not supposed to sustain a threat to the legislative pre-eminence of the Commons. However, it is a fallacy to assume that the acts alone were the sole factor in enhancing the supremacy of the lower chamber. Since 1945 the Lords voluntarily went far beyond the acts' provisions. Through the 1945 Salisbury convention, the peers, of their own accord, agreed not to oppose legislation introduced in government's election manifesto and therefore approved by the people. They understood that without any legitimacy for their presence in the otherwise democratically elected parliament any serious dispute between the two chambers would be reminiscent of the year 1911 and their 'peers vs. the people' unsuccessful battle. By advocating a self-introduced reform, the Lords showed some capacity of learning and modifying its own behaviour. Such an institutional change, in contrast to external pressures theory, resulted from an internal adjustment; a response to alter some "dysfunctional element arising out of the initial institutional design" (Peters 1999: 79; Lowndes 2002:105)

After the completion of the first stage of the Lords' reform, the Labour government expressed its commitment to a long-term process of finishing its undertaking. However, this pledge was not accompanied by any blueprint for the reformed House. That seemed to forecast some further impediments. The establishment of Royal Commission under the chairmanship of Lord Wakeham, which published its report *A House for the Future* with 132 recommendations, did not have an enthusiastic reception either. Its most important provision to keep the existing power balance between the two Houses indicated indecision and timidity (McClean 2000: 282-3). Consequently, the modified upper House, an interim Lords, dormant for so long, stopped being complacent about its relationship with the lower counterpart. Paradoxically, they felt empowered after the removal of hereditary peers; the relics from the pre-democratic past. That was the reason behind the new resurgence in the activity of the Lords. Its Tory leaders thought that without the majority of expelled lords the chamber became more legitimate, more democratic. They had thus been emboldened by the purge and started playing the role of "the people's champion" (Wolf 2001: 7). Before 1999, the Lords was forced to concede to a few controversial government's reforms; namely the Common's Welfare Reform and the Pension Act. Once reformed, they even dared to reject the Labour Party's agenda for the first time in over 50 years. They also blocked the Commons motion which would restrict trial by jury practice in some less important cases, securing in this way every Briton's legal protection. In the 2001-2 session alone there were fifty six government defeats with some of the most important bills substantially modified, i.e. the Anti-Terrorism or Crime and Security Bill (Wolf 2001: 7-8; Carter 2003: 320). The Lords' increased activity

enhanced their prestige in a country with no written constitution and omnipotent powers of the executive.

The proposed second stage of the reform did not, however, disappear from Labour's agenda. In Lord's Wakeham's view (2000: 277-8), it became a real opportunity of laying the foundations for a successful long-term reform of the House of Lords. Failure seemed no option and the upper chamber was to change significantly. Although conscious of the difficulty of the issue, the commission adhered to its four rudimentary conclusions, which identified the main roles for the reformed House. It was expected to remain a chamber of expertise and experience, this time however involving a broader representation of the society. It was also to provide a formal voice in parliament for the nations and regions of the United Kingdom. Above all, in such modified circumstances the Commons was to retain its pre-eminence in the parliamentary sovereignty arrangement. The proposals, though seemingly justified, were to undermine some major centuries long principles of the British tradition lying at the heart of the Lords' existence. They did not satisfactorily define the reformed House's new powers, questioned the methods of peers' selection, and finally affected its future composition. Each and all of these issues further violated some other well-established conventions, namely the one of political representation elitism, the patronage of the winning party and several other unwritten principles on which the Lords rested. No wonder the troubles appeared in all of the fields to be affected by the change process.

The reformed second chamber might claim, at the very least, that the principle on which cabinet government is based, namely the dominance of the Commons, is not valid any more and thus threatened. A more representative and democratic upper chamber was likely to prove a stronger one, not weaker. History has manifested this already. On the whole, it was always Conservatives whose proposals such as Lord Salisbury's in the 1880, or Lord Rosebery's in the years 1908-11, sought to rationalise the composition of the Lords through, for example, introducing life peerages (Low 1904: 93-4). When in 1952 the Conservative government proposed all-party talks on the issue, Labour refused to participate. A few years later it opposed to the Life Peerage Act of 1958 precisely because it would strengthen the upper House. For many Labour supporters, the victory in 1964 over Tories personified by the land-owning Sir Alec Douglas-Home, symbolised a final removal of aristocratic unelected and ancestral power (Taylor 2004: 156). Such enthusiasm was, however, premature. Neither Asquith in the years 1909-11 nor Atlee during the post-war Labour governments showed any interest in rationalising the composition of the Lords. The 1960s also failed to break the power of aristocracy. Its presence and values remained very much at the heart of British

society and culture. Above all, fearing that a modified and thus stronger second chamber would prove a more powerful safeguard against a reforming government on the Left, Labour avoided any involvement in the Lords reforms. If carried out, they might not guarantee to maintain the pre-eminence of the Commons, thus violating the Westminster tradition (McLean 2000: 382).

An insistence on 'more democratic' participation of the future Senate members had some further constitutional implications. If the principle of representation upon which the second chamber rests were to be more valid, then in any clash between the two chambers, it would be argued that the second House should prevail. So far the problem has been avoided due to the method on which bestowal of peerages is based. Obtaining a life-long seat in the Lords is not conditioned territorially as is the case of MPs; the peers represent no one but themselves; the writs of summons are personal either by virtue of birth or political appointment. Such a selection of representation has, in time, resulted in frequently non-partisan traditions among the peers, both life and hereditary. With changing monarchs as well as governments, the peers, be it conservative or labour, have usually brought in a much more independent judgement into the process of governance. With more democratic thus egalitarian membership of the reformed chamber, this historically ground principle will be put to a new test. Besides, if the reformed House is to become more legitimate and consequently powerful, parties will do anything to control it. Then any proposals to diminish the degree of their involvement would again entail legitimate membership based mainly on appointment (Shell 1999: 393). Such a solution flies in the face of Lord's Wakeham's recommendations, as they seem to duplicate the present constitutional settlement on a revised set of principles. Wakeham's endorsement (2000: 289) that "no one party should ever again be able to dominate the second chamber" could thus be dismissed as his wishful thinking.

Another historically grounded issue which will have to be solved with the reform of the House of Lords is the problem of choosing an electoral method that would secure a more representative second chamber. If elected directly via proportional representation, a method so often attributed to the revised second House, the new Lords or Senate would again be regarded more legitimate than its hitherto existing dominant counterpart. It would rightly deserve to be listened to with greater respect than the Commons. This might undermine the existing practice of governance in the United Kingdom, whose underlying feature is that "a representative government remains what is has been since its foundation, namely a governance of elites" (Manin 1997: 232) Whether the new Lords' members are chosen by party mechanisms, as is the case with MPs in the Commons or life and law peers in the

Lords, they distinguish themselves from the rest of Britons by their social standing, education and way of life. In this respect membership of parliament has always been 'socially exclusive' in Britain. The intakes of present-day parliaments are not much different from the traditionally elected elites in the former times. The majority of parliamentarians are middle class, university educated and overwhelmingly male. Insistence on the upper House to become more representative would, in turn, entail involving more women and ethnic minorities. This could be partly achieved by introducing proportional representation. The problem then would be to find good candidates to stand for the new second House. The likelihood is that the chamber would attract those who have not been successful in securing nomination for a Commons constituency. Such senators would hardly guarantee preserving the present Lords' expertise in scrutinising and amending legislative work of the lower House. Meeting such seemingly unreconcilable criteria, namely preserving the sufficient legitimacy of the future Senate's membership and keeping specialised abilities of its members, might prove a difficult task. Likewise, expecting the revised upper chamber to remain in the same relations with the popular one and the executive which dominates it seems an implausible requirement (Puttnam 1999: 369).

An indirectly elected chamber, wholly or partially, might seem a better solution then. It would be less likely to challenge the government, nor could it easily become an independent centre of active political initiative. A suggested twelve-year term, with one-third of its members elected every four years, could, on the other hand, ensure the desired candidates. Such terms would be long enough to attract people with substantial reputations, who either see their membership in the upper House as a prelude to some other political role or a final career stage before retirement (Shell 1999: 394).

With no political consensus in parliament in which direction to follow, there was no progress in implementing either of the two electoral options discussed above. Finally, in 2003 a Joint Committee of both Houses prepared seven different options of the reformed chamber: a completely new elected or appointed one or one that forms something of a hybrid with different percentage of elected and nominated members. None of the suggested options gained sufficient support in the Commons. The dominant view of the Lords was in favour of an all-appointed House. Despite the lack of parliamentary majority for any option, the Joint Committee expressed their hopes that the momentum for reform could be regained (Clarke and Venning 2008: 9-10).

A much more serious debate was, however, raised in regards to the Wakeham's recommendation on providing the nations and regions of the United Kingdom a formal voice

in the revised House (2000: 278). Such a chamber would have to be composed of delegates from the devolved executives in Scotland, Wales and Northern Ireland. As England lacks its own regional administration, English representatives would be delegates from the London authority and other local authorities or regional chambers. Some politicians had even proposed an indirectly composed chamber modelled on the German Bundesrat (Bogdanor 1999: 285). Introducing such a model would, however, demand something that the present constitutional arrangement does not guarantee, i.e. the equality of its constituents. In the case of British institutions the solution thus seems inapplicable; any power analysis would first have to tackle the issue of the asymmetry in their reciprocal relations, which reflects historical inadequacies of power and access. Without acknowledging and amending them, no change progress could be either carried on or understood properly (Hall and Taylor 1996: 940). The problem with British regional executive and legislative institutions, i.e. the Scottish Parliament and the Welsh or Northern Ireland Assemblies, is that in the devolution process carried out in 1999, the United Kingdom became a form of asymmetric quasi-federalism, not a federal state. (McLean 2000: 384). Consequently, each nation of the British state gained different powers and relationship to Westminster. Insisting on an indirectly elected chamber modelled on its German counterpart would have an effect of reopening a debate on many of the contentious features of the devolution settlement. Such a discussion might also raise anew the West Lothian Question, i.e. the Scottish over-representation in the Westminster political circles; their right to vote for English domestic affairs or finally appropriateness of choosing Scots to become ministers or prime ministers in the devolved state. Any discussion on regional representation would further accentuate an already existing constitutional imbalance and cause more dilemmas (Richard and Welfare 1999: 172).

The tensions over choosing an appropriate electoral method, the future role of the reformed chamber or an appointment committee, in case the senators were to be nominated, inhibited every further attempt at reform after 2003. There were some intermittent proposals for reform but none commanded widespread support. All leading politicians' statements, though, expressed their commitment to abolishing the absurdity of the House of Lords with its hereditary peers. Likewise the major political parties assertively persisted in showing their attachment to the modernisation pledge. In their manifestos of 2005, the Labour Party, the Conservatives and the Liberal Democrats adhered to reshaping the upper chamber. It was, as in Lords Wakeham's recommendations (qtd. in Clarke and Venning: 2008: 25-33), supposed to remain complacent rather than replicative in its functions to the Commons, becoming at the same time more efficient, legitimate and representative. The only noticeable difference

was that with pending discussions on the reform, new controversies started to arise, namely the ones concerning potential changes of political conventions, codification of the future chamber's functions or even choosing the right age of the future senators.

With the impetus for reform petering out and numerous doubts expressed over the proposed solutions, postponements and all party consultations on the issue became a permanent feature of Westminster's proceedings. The slow change process and its subsequent phases seemed to emphasise the validity of Pierson's views on institutional continuity and persistence. Any further progress appeared to require some reconceptualisation of initial aims on the part of the reform advocates (1999: 490). With their constant insistence on the dominance of the Commons, some politicians would even anticipate undesirable outcome of the reform. Lord McNally (qtd. in Clarke and Venning 2008: 34-9), the leader of the Liberal Democrats, feared for the future parliament to assume a unicameral shape with all powers of the future Senate annihilated. One of the paradoxes of the British history, in his view, was that the Lords after 1999 gained higher reputation than at any time in recent history and already worked the way the revised chamber was supposed to do. It learnt to use its limited powers in a constructive way and still retained its right to say 'no' The most frustrating thing was that, as the deputy leader of the Commons noticed, "there was a large degree of agreement about the fundamentals of the proposed changes, yet [few could] find a clear way forward". Without doubt, there were also some politicians who still thought it would be safer to keep the *status quo*.

In 2006 a Joint Committee on conventions was established; an unavoidable step in the course of constitutional overhaul if any further stages were to be implemented. It contributed to the constitutional process with a special report, aiming to tackle some of the Salisbury convention dilemmas. These arose with the more robust activity of the Lords, which would occasionally block the governmental programme announced in the manifesto. It seems that, as Johnson noted (1999: 140), Britain reached the end of the epoch in its political evolution during which conventions and precedents were to shape constitutional norms. More and more frequent demands for the codification of the precise future Senates' functions, as well as an instance on abolishing of many of the existing traditions were in line with the initial tenets of Labour's modernisation and reform programme. The requirements for "a description of procedural niceties", was, however, more likely to produce an opposite effect; a legislative gridlock. The Lords as a self-regulating chamber has learnt how to choose its powers properly. It is precisely the procedural flexibility of the upper House that has made it successful and working. The demand for a more powerful and effective upper chamber in this context might

seem somewhat puzzling (Carter 2003: 319-20). When the Committee's report was finally brought forward, its recommendations once again tried to reconcile the opposing and contradictory views. Unsurprisingly, the Committee insisted on the primacy of the Commons, but ruled out any legislation that would codify and effectively turn conventions into any written form. It also approved of the Lords' right to reject statutory instruments in exceptional circumstances. Furthermore, it refused to impose any limits on the Lord's legislative considerations (Clarke and Venning 2008: 42-5). Traditionally, running the upper House has always been more flexible than that of the Commons. Thus, any prospect of imposing some regulations seems of little value and unforceable, unless ironically it were to be implemented by unelected judges (Carter 2003: 321).

The Joint Committee consensus appeared to uncover all weakness of the reformers' activity; their inability to go forwards with seemingly well designed aims. The common ground in all considerations was that the Lords was to remain a revising chamber, where governmental measures are to be scrutinised and amended. All other suggestions brought more difficulties than decisive solutions. Part of the problem was probably due to the way the government approached its programme of constitutional reform. With an assumption that any change was to remain minimal, with little or no consequent effect on other practices, conventions or institutions, each element was treated as discrete and self-contained. British governance practice, however, characterised by countless forms of political restrains and controls as well as by shared values and attitudes, could not be treated with half-way measures. Despite some politicians' scepticism and wish to neglect the well-established conventions and traditions, the attempt to disregard them altogether proved to cause more difficulty than it had initially been anticipated. In the words of Johnson (1999:150), a keen advocate of a thorough parliamentary reform, already at the first stage of the reform, there was too much uncertainty whether the legal arguments and analyses were sound and adequate. What was even more uncertain was whether people at large were ready for the change.

The spring of 2007 appeared to bring new hope in constitutional chain of events. On the seventh of March, the Commons voted for a fully elected House of Lords by a majority of 113 MPs; supporting at the same time the principle of bicameral legislature. A week later, the peers followed suit by choosing the same option. Both votes were, though, of an advisory kind, a guide for government's further steps and as such had no force of a legislative statute (Clarke and Venning 2008: 50-2). With the weakening position of Tony Blair and constant speculations on Gordon Brown's succession, further cross-party talks on the reform's minor issues as well as some other legal impediments, the pace of pro-reform activity seemed to lose

much of its already weakened impetus. The only positive outcome of the year 2007 was that Gordon Brown finally became Prime Minister, which closed endless speculations on Labour's leadership. Once chosen, the new premier again committed the party's readiness to constitutional reform for the coming year. Similarly, Queen Elizabeth II, in her speech delivered in November 2008 (*The Queen's Speech*), pledged that "[her] government [would] continue to take forward proposals on constitutional renewal, including strengthening the role of parliament and other measures". Nevertheless, with other far more pressing problems in the fields of finances and social issues no vital constitutional steps have been taken ever since.

However tempting it is to come forward with some definite guesses on what may happen in the nearest future it seems impossible to predict a definite outcome. The second stage of the reform process, seemingly coming to an end, might take anything from weeks to years. After all, the 1911 interim Lords survived for almost a century through the lack of agreement and unwillingness of subsequent governments to enact further reform steps. The 1999 Lords reconstruction, which was supposed to bring a tangible effect right away, has turned to be a drawn-out, incompressible many years-long process. It would, however, be wrong not to admit some other successes accomplished along the parliamentary overhaul. In the year 2000 the British parliament accepted European legislation on Human Rights. This move, as well as the debates on the Lords' numerous functions, has led to substantial changes in the judiciary area; separations of the lord chancellor's executive and judicial powers, the establishment of the Ministry of Justice or the current removal of law lords from the House. The future Highest Court of Appeal to be operational from October 2009 might, in turn, play a crucial part in any further separation of powers in the United Kingdom.

There have, however, remained some other untouched and thus unsolved problems of the half-reformed Lords, i.e. the privilege of the Church of England to maintain its representation in the House, the future of the presently elected life peers or the issue of the bestowal of honours and titles to name just a few. As for the last one the Public Select Administration Committee has already recommended a complete break with the practice of linking conferring awards and offering a seat in the Legislature. Peerages and honours, so characteristic of British culture of elitism, are not, however, to be abandoned altogether. They are, as is already the case with some life peerages, to be conferred for past activities to distinguished citizens (Clarke and Venning 2008: 64). Even retaining the official title of the otherwise modernised post of the Lord High Chancellor has proved timidity and uncertainty on government's part. The present chancellor, Jack Straw, a member of cabinet and custodian of the Great Seal, is at the same time the first chancellor since 17‑century to be a commoner.

Retaining the historic office, "so vital in protecting the rule of law", has helped "to preserve the balance of powers in Britain's unwritten constitution" (Hurst 2004: 2).

Keeping the title of Lord Chancellor might, however, exemplify something completely different; the strength of the tradition of the privileged and honoured. Keeping the system of titles and honours intact, supposedly for historical associations, has also proved useful for some other reasons. Peerage patronage remains a vital mechanism of rewarding and building support in the ruling party; a mechanism which not necessarily merits those who deserve them. As the 2006 cash-for-honours scandal proved, the latest controversial nominations draw parallels with the events of nine decades ago, when Arthur Maundy Gregory sold peerages from 1918 and throughout the 1920s. Above all, any attempt at modifying the system might raise an array of other interrelated issues, i.e. the role of the monarch in the hierarchically ordered elitist state, the hereditary basis on which the institution of monarchy rests or powers vested in the institution itself. Furthermore, raising the issue of modification of the titles and honours system would question retaining numerous ceremonies and duties, which such practices entail, including the State Opening of Parliament. It would be difficult to abandon them as they are claimed to strengthen all the very values which symbolise the British national unity and its continuity (Norton 2006: 386; Johnson 2004: 57-76).

CONCLUSION

The decade long persistence of Labour governments in administering institutional change based on the proposals of the 1999 White Paper has resulted in some paradoxical outcomes. First, it has made all adherents of constitutional reform focus on the Westminster model in any official political discourse. This, in turn, seems to have halted rather than pushed forward institutional reconstruction. Continuing centrality on the pre-eminence of the House of Commons has not facilitated any substantial internal as well as external organisational interactions among institutions. Disagreements in which way to follow have also posed challenges which Labour did not foresee initially. In offering a clearly-defined institutional arrangement, Wakeham's proposals denied legitimising a more radical or rational overhaul of the future Lords. Consequently, it has stopped any thorough debate on the question of both Houses' powers, making other issues, i.e. the one of their composition or codification of main principles, equally difficult to define.

Sticking to institutional norms and values associated with the Westminster model has accordingly left many questions unanswered. Responding to them properly would entail

upsetting the balances in the parliamentary system, not only between both chambers but between parliament as a whole and the executive. Last but not least, the norms approved of by the present parliamentary system, i.e. those of party loyalty, career aspirations or appropriate behaviours, would have to go under a more meticulous scrutiny. In a governance system which has taken shape over centuries norms do not belong to individuals. Intrinsically, they constitute the core of the institutions themselves, be it the Commons, the Lords or the Executive.

It seems that by choosing to modernise Britain, Labour has entered a minefield, where every single step immediately creates potential obstructions. It should be remembered that any radical change in the British polity, a reform of the Lords being a case here, may pose a severe threat even to the unity of its state with its unwritten constitution and ancient conventions still in use. Much that remains at the core of parliamentary practice has been the outcome of gradual constitutional evolution, which though codified in statutes, acts or statutory orders, is at the same time a matter of conventional behaviours, customs and honorary practices. All these, according to historical institutionists, cannot be underrated and cast aside. Without sustained exposition of the wider context in which institutions are embedded, Labour governments, or any other that wish to go forward with the reform, will have to be confronted with either keeping an elitist, partially hereditary chamber at the heart of the British political system or embarking on a new path in parliamentary arrangement with uncertain effects. The institutional interconnectedness, 'the path dependency' of the past and present choices or the set of norms, values and meanings are all immanent features of any British institution. As such they have always acted as safeguards being at the same time deterrents to change.

The present accelerated pace of constitutional adjustments might still lead to a huge muddle or, at least, an inertia with the half-reformed Lords becoming the new 1990s unfinished business. It might, though, under some favourable circumstances, reshape the upper chamber into a stronger, more legitimate and efficient House. Without doubt, Britain needs its new Lords to scrutinise and improve the Commons' output. It remains to see what it will get.

Abstract

The process of modernisation of the British state, and in particular the reform of the House of Lords, a key project of the whole undertaking, became the main issue for the Labour

Party coming into power in 1997. The transformation of the Upper House of the British Parliament into an elected chamber, and above all, debarring the hereditary peers from the influence on the legislative and executive governmental spheres, seemed to be an easy task. Few, therefore, had foreseen difficulties with which the Labour governments would have to struggle until this day.

The present article sets itself the task of outlining the problems concerning the unfinished reform of the British Upper House in the light of the historical institutionalism theory. It presents the discrepancy between the reformers' discourse and aims advocating the idealised Westminster model, which allegedly serves as the basis of the British parliamentary practice, and the real comprehensive account of how power is exercised in the United Kingdom. The article illustrates the complexity of any attempt at institutional change in a state characterised by numerous historically grounded institutional interactions, which makes the future of the ambitious project of abolishing the Lords uncertain.

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CONVERGENCE OF POPULAR CULTURE AND POLITICS IN THE USA DURING THE 2008 PRESIDENTIAL ELECTION CAMPAIGN

Key words: Barack Obama, celebrity, popular culture, political discourse, presidential election.

Introduction

This article is designed to explore the convergence of popular culture and politics during the presidential election campaign of 2008. The article shall commence with the clarification of the meaning of the concepts of popular culture and celebrity, and will continue with a short overview of the existing theoretical framework dealing with different approaches to fame and celebrity culture. The analytical part of the article will be devoted to the examination of the narrative structure of the celebrity persona of Barack Obama created by media during the last presidential campaign. The analysis shall be based on a wide range of popular culture texts: newspaper articles, campaign memos, interviews, advertisements and TV reports. The aim of this article is to show how the saturation coverage of celebrity changes political discourse, and how the concept of fame used in the campaign facilitates the reading of celebrity as a derogatory force which downgrades serious politics.

Barack Obama in an interview for the Rolling Stone magazine entitled "A Conversation with Barack Obama" says that popular culture "both shapes and reflects what's happening in the country as a whole" (qtd. in Wenner 2008). His remark aptly reflects the belief that popular culture nowadays with its discursive framing of social issues is at the center of debates concerning contemporary culture. In fact, it is a focal point for the discussion of current political issues and provides a rich conceptual repertoire for their interpretation. However, it is often the case that the boundary between popular culture and politics is blurred or even nonexistent as the authors of *Celebrity Politics* claim when advocating that "Politics *is* popular culture" (West and Orman 2003: ix). This tenet is the starting point for the investigation of the convergence of popular culture and politics. The aim of this

project is to focus on one particular aspect of the contemporary restyling of politics, namely the dissemination of celebrities in political context and the celebrification of politicians.

Entertainment and media have undoubtedly intruded on the sphere of politics. However, while "manufactured pop has adopted some of the paraphernalia and conventions of political electioneering, politics has become more of a 'culture industry', increasingly resembling a talent show or popularity contest", as Corner and Pels claim. Thus, "star-gazing and infotainment have become equally central as they are to the tabloids and the celebrity magazines" (2006: 2). In this vein, it should come as no surprise that contemporary methods of political communication are based in the particular culture of the time. The contemporary one is pervaded with media generated personas; therefore, the interpolation of ubiquitous phenomenon of celebrity into politics reflects a general trend in contemporary culture. As Liesbet van Zoonen believes: "Politics has to be connected to the everyday culture of its citizens otherwise it becomes an alien space, occupied by strangers no one cares and bothers about" (2005: 3). This everyday culture which constitutes politics could thus be defined as popular culture which is:

> *"a site where the construction of everyday life may be examined. The point of doing this is not only academic – that is, as an attempt to understand a process or practice – it is also political, to examine the power relations that constitute this form of everyday life and thus reveal the configurations of interests its construction serves".*

> (Turner 1996: 6)

Reflecting contemporary popular discourse, the unprecedented dominance of celebrity in contemporary culture finds its manifestation in two major perspectives on this phenomenon. In a "populist democracy" approach, celebrities represent a process of social leveling (Evans 2005: 14). This perspective reflects a Warholian '15 minutes of fame' for everybody. Moreover, it underscores a positive role of this kind of fame, which contributes to effective democracy as it perceives fame as a positive phenomenon connected with personal freedom, equality and self-made men. Leo Braudy considers the lack of accomplishment, which is an integral part of the generic understanding of celebrity, to be functional as "the less you actually had to do in order to be famous, the more truly famous you are for yourself, your spirit, your soul, your inner nature" (1997: 555). Championing being famous for yourself is the epitome of modern 'DYI' fame. Furthermore, the 'populist democracy' approach to fame finds merit in celebrity on the basis of the fact that it serves as a source of cohesion in the society. Ponce de Leon claims that in the culture of celebrity we celebrate "democratic and collectivist

values connected with the ideal of true success and contrary to the atomistic individualism of capitalist market economy" (2002: 281).

Accordingly, in the vein of the populist approach, the media saturated political culture can be perceived as a positive phenomenon. From "an enabling perspective", presented by John Corner and Dick Pels in their collection of essays called "Media and the Restyling of Politics", the media are "necessary agents of the practice of modern, popular democracy" because "their circulation of knowledge, presentation of diverse views and critical scrutiny of those in power will act as a guarantor of political health" (2006: 3). Another optimistic argument for "performative politics" is the fact that it first attracts and then engages the audience. The politics of personal style "may generate democratic effects, by expanding the platforms for engagement and citizenship, and by offering forms of popular appeal and emotional identification that cut thorough technocratic some-screens and institutional inertia" (Cornel and Pels 2006: 10).

The second group of perspectives on celebrity culture called the "cultural decline" or "mass culture" approach looks at contemporary form of fame from a different angle. This critical approach maintains that celebrity is a symptom of cultural decline. It assumes meritorious ground for fame in the past when fame was scarce, and claims that celebrity is "empty fame" devoid of any merit or accomplishment and as such it degrades cultural discourse. Daniel Boorstin (1992) with his seminal work "The Image: a Guide to Pseudo-Events in America" asserts that in the past fame was synonymous with greatness and now the household names are no longer heroes but artificial new products, 'human pseudo-events'. This negative approach to celebrity is shared by Richard Schickel (2000) who describes celebrity as a distorting force in a society fostering the illusion of intimacy between the favored ones and the unknown mass, a type of "pornography of the spirit".

In accordance with this line of reasoning, the media saturated political culture is perceived as a negative phenomenon in which there is a dominance of image over substance. In this "disabling" perspective, democracy is undermined by "the substitution of entertainment for knowledge" in which political values are replaced by those of the media (Corner and Pels 2006: 4). In such a case, important issues are downgraded, watered down and distorted because of the personalization of politics, in which image is more important than substance. Such personalization of politics takes place when "powerful sets of values that are historically bound up with celebrity, such as intimacy, confession and revelation of personal lives, are 'leaked' into political life more generally" (Evans 2005: 48).

Both approaches to contemporary form of fame indicate a widespread critical belief that the development of celebrity has an ever-increasing influ-

ence on different spheres of life. Through celebrities the media are believed to shape the reality and convey the way in which people see and interpret the world. Through the symbolic meaning of celebrity image, the media create polysemic texts which can be analyzed in a hermeneutic way, housing a number of different discourses, discourses which are interpreted and appropriated by different power groups within the society. Leo Braudy in his seminal book "The Frenzy of Renown: Fame and its History" accounts for this appropriation of celebrity fame into contemporary politics in the following way:

"In aristocratic societies, the political system to a great extent had determined the system of public fame. In mass democratic or totalitarian societies of the twentieth century, however, it is fame that primarily determines political power. Through both the totalitarian "cult of the personality" and the democratic appeal to the crowd, the leader (along with lesser politician) often stresses his symbolic significance more than his actual policies." (1997: 556)

What Leo Braudy describes in this short excerpt is the issue of the "personalization" of politics, which gave birth to the concept of the "celebrity politician". Liesbet van Zoonen in "Entertaining the Citizen: When Politics and Popular Culture Converge" proposes to "consider the contemporary politician in terms of the persona he or she manufactures from the equally important ingredients of politics and celebrity culture" (2005: 17). The desired merger of these two is the "public personality". Also P. David Marshall, while discussing the relationship between politicians and celebrities, points to the fact that "One of the critical points of convergence of politics and entertainment is their construction of public personalities" (1997: 203). Furthermore, in his book "Celebrity and Power: Fame in Contemporary Culture", Marshall advances an argument that the political leader and other forms of celebrity "are forms of subjectivity that are sanctioned by the culture and enter the symbolic realm of providing meaning and significance for the culture" (1997: 19).

There is a prevalent sense that the dissemination of celebrities in politics provides meaning and significance for the audience because its function is to "to make a highly complex, and sometimes rather opaque, world simpler by furnishing it with a 'human' or personalized dimension" (Evans 2005: 43). In other words, celebrities organize the perception of the world for us and humanize intricate issues. By doing it, they provide a point of identification and facilitate understanding of the issues in question. However, the potential for criticism of such a convergence of popular culture and politics is not difficult to foresee, especially from the culture decline perspective.

Nonetheless, J. R. Cutler, the producer of the political reality show "American Candidate", in response to criticism connected with the trivialization of political issues in his program, retorted as follows: "Far from trivializing, far from blurring the line we celebrate, in a fairly romantic way, the notion of politics and electoral politics" (qtd. in Stewart 2004). It seems that no event can better illustrate appropriation of political electioneering into popular culture and humanization of politics than the Showtime's Network reality series, "American Candidate". This televised political popularity contest has been designed to choose a person who has the qualities to become the President of the United States. Ten contestants vie for the $200,000 prize and the chance to address the nation on TV. Each week, they perform the same tasks as real politicians: go around the country, speak at rallies, and hold press conferences. They win the episode on the basis of the number of telephone calls in their support. The program is an excellent example of the convergence of the sphere of politics and entertainment not only in the way it brings "nonpoliticos" into the enactment of fake presidential primaries, but also in the way it uses well-known political spin doctors and famous people to legitimize the show.

To start with, one of the major assets of the show is its creator R. J. Cutler, who was a producer of D. A. Pennebaker and Chris Hegedus's "The War Room," the behind-the-scenes documentary about Bill Clinton's 1992 Presidential campaign focusing on the activities of spin doctors James Carville and George Stephanopoulos. Secondly, the "American Candidate" features a number of well-known political experts advising the candidates. However, as Jennifer Lee (2004) points out in her New York Times article entitled "I Am a Political Consultant and I Play One on TV": "instead of operating behind the scenes, as they do in ordinary elections, in "American Candidate" they were all paid to be both strategists and characters, on-screen players in the unfolding action". The name-brand political consultants who decided to take part in the show include such names as: Joe Trippi, Howard Dean's campaign manager; Tony Fabrizio, a former pollster for Bob Dole; Rich Bond, a former chairman of the Republican National Committee; Frank Luntz, a Republican pollster, and Carter Eskew, a top strategist in the Al Gore 2000 presidential campaign.

The popularity contest reality show in the vein of "American Idol" is an excellent example of the convergence of popular culture and politics. One of the political consultants on the reality series, Carter Eskew, compares the presidential primaries to "one big, extended reality show where people are getting voted off" (qtd. in Lee 2004). Joe Trippi, in turn, comes to believe that "reality television was a suitable home for electoral politics, the elimination game that predates "Survivor" and "The Apprentice." (qtd. in Lee 2004) but

this time "contestants consume political strategy instead of bugs" (qtd. in Keveney 2004). Frank Luntz goes even further claiming that "In one sense, the reality television was more real than real life. The candidate actually lived or died by their own performance, as opposed to campaigns, which have a lot of external influences" (qtd. in Lee 2004).

Such a refashioning of popular culture and politics has far reaching consequences for the way in which political discourse is conducted. One of them is the trivialization of politics; however, Martin Kaplan, an associate dean of University of Southern California's Annenberg School for Communication claims that "elements of the news media already work to transform politics into "entertainment and punditry"„ (qtd. in Keveney 2004). Nonetheless, potential criticism that the show might muddy the waters between politics and entertainment is hard to deny. In response to the above argument, J. R. Cutler says that the line between these two areas „has been blurred probably since the tabloids made vicious fun of Adams and Jefferson in the first contested election we had after George Washington" (qtd. in Stewart 2004).

Undoubtedly, the "line" has been blurred; media and celebrities have become an integral part of political life, especially since the presidency of Bill Walker Clinton and his appearance on the "Arsenio Hall Show". However, the recent developments show a drastic change in the perception of the "celebrity-in-chief" president and the White House. It seems that the love affair with the ubiquitous celebrity rhetoric started on July 30, 2008, when a groundbreaking television advertisement titled "Celeb" was released by the campaign of the republican presidential candidate John McCain. In this video, presidential contender Barack Obama is referred to as the „biggest celebrity in the world". What is even more significant for the subsequent use of the celebrity discourse, the ad shows the footage from Obama's speech in Berlin with people chanting "Obama, Obama" and thus suggesting a rock star adulation, and features images of pop star Britney Spears and socialite Paris Hilton reeling across the screen. "He's the biggest celebrity in the world. But is he ready to lead?" says the ad's narrator against the background of throngs screaming the name "Obama". The narrative structure of this advertisement creates a storyline corresponding to the imagery used for the presentation of a rock-star rather than a politician. By juxtaposing the image of the presidential candidate with the most recognizable and least liked celebrity signs of Britney and Paris, Obama's leadership skills are called into question and, thus, the ad's imagery highlights his lack of accomplishment. The advertisement establishes a narrative of empty fame by associating the Obama persona with celebrity "a person who is known for his well-knowness" (1992: 57), as the most famous definition by Daniel Boorstin

asserts. Bubble-gum celebrities Britney Spears and Paris Hilton are known exactly for the sole reason of being visible because they are "'names' who, once made by news, now make news for themselves" (Boorstin 1992: 61).

The argument of Obama's lack of experience and necessary leadership skills is incorporated in the narrative texts created by McCain Campaign. The commercial was followed by the memo issued by Rick Davis, McCain Campaign Manager. This memo, entitled "Barack Obama's Celebrity", tries to establish the narrative which, according to Tom Bevan (2008), presupposes that "Obama is a popular, presumptuous poser whose lofty rhetoric is at odds with his real world accomplishments and experience". Rick Davies (2008) accuses Obama of egotism, arrogance, and being famous. He writes:

> *"Barack Obama is the biggest celebrity in the world, comparable to Tom Cruise, Britney spears and Paris Hilton. As he told Congressional Democrats yesterday, he has become the "symbol" for the world's aspirations for America and that we are now at "the moment... that the world is waiting for."*

> (Memo)

Furthermore, Davis uses popularity as the argument against Obama claiming that "Only a celebrity of Barack Obama's magnitude could attract 200,000 fans in Berlin who gathered for the mere opportunity to be in his presence. These are not supporters or even voters, but fans fawning over The One".

Rick Davis was not the first one to refer to celebrity status of the presidential candidates as the John Edwards Campaign, bragging about defeating Hillary Rodham Clinton, issued "The State of the Race Memo" slamming Obama and Clinton for being „celebrity candidates". Issued on January 4, 2008, the Edward's Campaign Memo says as follows:

> *"The Democratic Party should be the party of the people. The January 8th New Hampshire primary will be an election – not an auction. Just look at the results of the first contest: two celebrity candidates spend $200 million against a candidate who's got an unstoppable message of fighting for the middle class".*

The John Edwards Campaign uses the term "celebrity" in a negative way. However, in comparison with the meaning of celebrity employed by the McCain campaign, the discourse imbedded in this memo has different connotations. While Rick Davies emphasizes the "affective" aspect of the celebrity phenomenon, John Edward's Campaign associates celebrity status with

elitism, being a part of the "power system" which manipulates ordinary people. Such an approach to celebrity is nothing new as it reflects the long-standing attitude which maintains that celebrities are used to control the society, in Marshall's words, celebrities are considered to be "attempts to contain the mass" (1997: 243).

Undoubtedly, the use of celebrity as a key factor in the race for the White House is a recent development in the history of "official politics". However, the problem of convergence of popular culture and politics is by no means a new phenomenon. As early as in 1944 sociologist Leo Lowenthal in his essay entitled "The Triumph of Mass Idols" examined the evolution of popular biographies. On the basis of his research, Lowenthal concluded that the focus of media coverage had shifted from the heroes of the past, which he called "idols of production", to the "idols of consumption" who were related to the sphere of leisure (2006: 130). Neil Postman, in turn, in his "Amusing Ourselves to Death" warns that "Television frees politicians from the limited field of their expertise. Political figures may show up anywhere, at anytime, doing nothing, without being thought out of place. Which is to say they have become assimilated into the general television culture as celebrities" (1985: 135). This argument raised many years ago succinctly reflects the situation of "celebrity politicians".

The current intersection of Hollywood type of entertainment and politics could be very clearly observed during the last presidential campaign, in which the term celebrity was used as a weapon against the contenders. In a CNN report entitled "Politics Back in Popular Culture" Jennifer Westhoven points to the fact the major focus of tabloids is no longer on celebrity drama but presidential politics. This tendency can be symbolized by the appearance of the eight-page cover story about Barack Obama in the issue of People magazine right next to a story detailing Lindsay Lohan's relationship with her new girlfriend, Samantha Ronson.

That is why, it should come as no surprise that the U.S. presidential race turns candidates into celebrities as politics has become a pop culture phenomenon. With the advent of Barack Obama as "a celebrity-in-chief", "a pin-up-president", "megacelebrity", "a pop culture star/icon" and "a presidential idol", we have entered a new era of celebrity politics of pure spectacle. Such a celebritisation of politicians results in the re-fashioning of politics, turning it into an aesthetic exercise when image has overtaken reality, and the truth is submerged in the sea of irrelevance. In the mediagenic culture, fame and celebrities function as a meta-discourse that shapes social and everyday life.

Abstract

This article is designed to explore the convergence of popular culture and politics during the presidential election campaign of 2008. The article shall commence with the clarification of the meaning of the concepts of popular culture and celebrity, and will continue with a short overview of the existing theoretical framework dealing with different approaches to fame and celebrity culture. The analytical part of the article will be devoted to the examination of the narrative structure of the celebrity persona of Barack Obama created by media during the last presidential campaign. The analysis shall be based on a wide range of popular culture texts: newspaper articles, campaign memos, interviews, advertisements and TV reports. The aim of this article is to show how the saturation coverage of celebrity changes political discourse, and how the concept of fame used in the campaign facilitates the reading of celebrity as a derogatory force which downgrades serious politics.

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ZMIANY LEGISLACYJNE ZMIERZAJĄCE DO POLEPSZENIA BYTU DZIECI W WIKTORIAŃSKIEJ I EDWARDIAŃSKIEJ WIELKIEJ BRYTANII

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Cezary Michoński

Państwowa Szkoła Wyższa im. Papieża Jana Pawła II w Białej Podlaskiej

Streszczenie: Głównym celem niniejszego artykułu jest próba przedstawienia wysiłków legislacyjnych podjętych w XIX i na początku XX wieku, mających na celu polepszenie bytu dzieci, które mogą być uznane za początek państwa opiekuńczego w Wielkiej Brytanii. Wydaje się, że największe nasilenie tego typu działań nastąpiło w latach 1870–1908 i to właśnie wtedy można doszukać się początków państwa opieki społecznej w Wielkiej Brytanii. Kolejnym wnioskiem wypływającym z artykułu jest stwierdzenie, że niełatwo jest porównywać obecne standardy życia dzieci z dziewiętnastowiecznymi, gdyż nawet samo pojęcie „dzieciństwo" wydaje się trudne do zdefiniowania. Podczas gdy dzisiaj za koniec dzieciństwa zwykle uznajemy osiągnięcie pełnoletności w wieku lat osiemnastu, w dziewiętnastowiecznej Wielkiej Brytanii pełnoletność mogła oznaczać lat dziewięć lub dziesięć, gdy chodziło o zdolność do ciężkiej pracy fizycznej, lat dziesięć lub dwanaście, kiedy większość młodych ludzi kończyła edukację, czy nawet dwadzieścia jeden (mężczyźni) i trzydzieści (kobiety) w przypadku czynnego prawa wyborczego.

Słowa kluczowe: dobrobyt dzieci, państwo opiekuńcze, ustawodawstwo, epoka wiktoriańska, epoka edwardiańska, dzieciństwo.

Wstęp

Pod wieloma względami epoka wiktoriańska jest kluczowym okresem w historii społecznej Wielkiej Brytanii, gdyż to właśnie w niej struktura społeczna uległa bardzo istotnym zmianom. Brytyjczycy stali się pierwszym narodem w historii, który poniósł negatywne konsekwencje rewolucji przemysłowej, do których należy zaliczyć znaczne poszerzenie się przepaści pomiędzy warstwami społecznymi. Chociaż choroby, przestępczość oraz ciemnota od zawsze towarzyszyły brytyjskim biedakom, nigdy wcześniej nie występowały one na taką skalę jak na początku epoki wiktoriańskiej. Dlatego właśnie w tym okresie, po uchwaleniu w r. 1832, ustawy *Parliamentary Reform Act*, poszerzającej czynne prawo wyborcze, zostały zapoczątkowane reformy społeczne. Ten sukces legislacyjny rozpoczął działania reformatorskie, które pełniej zaowocowały w drugiej połowie dziewiętnastego wieku (Birch 1974, s. 14).

Dzieci odgrywały bardzo ważną rolę w epoce wiktoriańskiej ze względu na duże znaczenie przywiązywane do życia rodzinnego. Szczególna sympatia, jaką poddani królowej Wiktorii darzyli dzieci, uważana przez Trevelyana (1991, s. 546) za jedną z najistotniejszych wartości wniesionych przez Brytyjczyków do światowej cywilizacji, posłużyła reformatorom społecznym jako argument w kampanii mającej na celu wzbudzenie współczucia dla losu dzieci masowo zatrudnianych w fabrykach i kopalniach. Dzieci zdobyły owo współczucie, gdyż warunki ich pracy były tak potworne, że wręcz niewyobrażalne dla klas wyższych (Lipoński 2005, s. 496-497). Wystarczy wspomnieć, że niektóre dzieci były zatrudniane już w wieku 5 lat do zajęć trwających 15, 16 czy nawet 19 godzin dziennie, co powodowało, że rzadko mogły spać 4 godziny na dobę (Wood 1977, s. 89).

Dzięki wysiłkom reformatorów w 1833 r. Parlament uchwalił ustawę *Factory Act*, którą można uznać za pierwszą istotną interwencję państwa w sferę relacji pomiędzy pracodawcami a pracownikami. Ustawa ta zabraniała zatrudniania dzieci poniżej dziewiątego roku życia w fabrykach tekstylnych, spowodowała skrócenie godzin pracy dzieci starszych oraz wprowadziła wymóg zatrudnienia inspektorów nadzorujących pracę w fabrykach. Ponadto, w 1840 r. rząd brytyjski mianował Królewską Komisję do Spraw Zatrudniania Dzieci (Royal Commission on Children's Employment), która opublikowała raport ukazujący przerażające warunki pracy dzieci. W kopalniach zatrudniano je od piątego roku życia na ponad 12 godzin dziennie, gdzie musiały pracować w wąskich korytarzach często w zupełnej ciemności, natomiast starsi chłopcy, zaprzężeni do wózków z węglem byli wykorzystywani jako siła pociągowa (Wood 1977, s. 116). Ustawa *Mines Act* z roku 1842 zakazywała zatrudniania pod ziemią dzieci poniżej dziesiątego roku życia, natomiast nowa ustawa *Facto-*

ry Act z roku 1844 skróciła do 6,5 godzin dzień pracy dla dzieci poniżej trzynastego roku życia oraz nakładała na pracodawców obowiązek zapewnienia minimum bezpieczeństwa pracy.

Biorąc pod uwagę ustawy z lat 1830-1850 dotyczące zatrudnienia dzieci w fabrykach, należy stwierdzić, że już wtedy państwo brytyjskie zaczęło brać na siebie odpowiedzialność za losy dzieci z klasy robotniczej. Jeśli przyjmiemy za Scrutonem (1983, s. 492), że pojęcie „dobrobyt" definiuje szczęście istot ludzkich, wyeliminowanie wyzysku dzieci jako siły roboczej, wydaje się pierwszym krokiem we właściwym kierunku.

Głównym celem niniejszego artykułu jest przedstawienie kontekstu społecznego, w którym państwo brytyjskie zaczęło brać odpowiedzialność za dobrobyt dzieci z klasy robotniczej. Wydaje się, że ustawodawstwo zmierzające do polepszenia bytu dzieci w epoce wiktoriańskiej było nie tylko reakcją na trudne warunki życia w dziewiętnastowiecznej Anglii, lecz stanowiło również początek długiego procesu, który znalazł swoje uwieńczenie w stworzeniu państwa opieki społecznej (*welfare state*) w Wielkiej Brytanii po zakończeniu drugiej wojny światowej. Ponadto celem artykułu jest zachęcenie czytelnika do refleksji na temat ewolucji znaczenia pojęć "dzieciństwo" oraz "dobrobyt" od wieku dziewiętnastego do chwili obecnej.

Ideologia państwa opiekuńczego

Price (2007, s. 61) utrzymuje, że w latach 70. XIX w. po raz pierwszy państwo brytyjskie poczuło się odpowiedzialne za ochronę dzieci przed wykorzystywaniem ich przez własnych rodziców. Rzeczywiście, późna epoka wiktoriańska, dzięki politycznej filozofii J.S. Milla, przyczyniła się do rozwinięcia koncepcji państwa opieki społecznej. Przełom nastąpił, gdy politycy zdali sobie sprawę, że działalność charytatywna jednostek lub organizacji, zarówno religijna jak świecka, musi być zastąpiona przez, lub przynajmniej uzupełniona, o interwencję państwa. Ta zmiana ideologii jest wyraźnie widoczna w programie sformułowanym przez J. Chamberlaina: „Polityka jest nauką ludzkiego szczęścia, a zadaniem polityka jest ustalenie, jak może polepszyć byt społeczeństwa: jak może uszczęśliwić tych, którzy są w gorszej od niego sytuacji" (cyt. za Birch 1974, s. 91-92, tłumaczenie własne). W cytacie tym Chamberlain zakłada, że w swoich działaniach rząd musi zapewnić dobrobyt wszystkim obywatelom państwa, co dziś wydaje się truizmem, lecz w realiach dziewiętnastowiecznej Wielkiej Brytanii nie było dla wszystkich oczywiste.

Przełomowym wydarzeniem w rozwoju koncepcji państwa opiekuńczego okazało się rozpowszechnienie poglądu, że ubóstwo nie zawsze wynika z winy jednostki, lecz bywa skutkiem procesów społecznych. Można przyjąć, że to dzięki takim poglądom, rozpowszechnianym m. in. przez Towarzystwo Fabiańskie (*Fabian Society*), w 1906 r. Partia Liberalna, przy dużym poparciu klasy robotniczej, zdobyła przytłaczającą przewagę w Izbie Gmin. Nic zatem dziwnego, że dobrobyt dzieci okazał się jednym z priorytetów rządów liberalnych w latach 1906-14 (Cootes 1985, s.240; Price 2007, s. 61).

Ustawodawstwo dotyczące zatrudniania dzieci

Pomimo tego, że ustawy fabryczne z pierwszej połowy XIX w. zlikwidowały najbardziej rażące aspekty zatrudnienia dzieci w zakładach przemysłowych, w okresie późnowiktoriańskim wykorzystywanie dzieci do pracy fizycznej wciąż było zjawiskiem nagminnym. Ma to odbicie w popularnych wyobrażeniach tej epoki, gdyż zazwyczaj "przedstawiamy sobie dzieci epoki wiktoriańskiej jako umorusanych obdartusów, przypominających małych kominiarczyków" (Himmelfarb 2007, s. 216, tłumaczenie własne). Rzeczywiście, wydaje się, że największym zainteresowaniem publicznym w tym okresie cieszyli się pomocnicy kominiarzy, których zadanie polegało na wspinaniu się na kominy (*climbing boys*). Chłopcy ci, często sprzedawani na służbę przez rodziców czy opiekunów, byli traktowani niewiele lepiej niż niewolnicy. Oprócz konieczności pracy ponad siłę byli oni bici i głodzeni przez swoich panów, a wszyscy, z którymi mieli kontakt, traktowali ich jak wyrzutki społeczne (Mason 1990, s. 166). Pomimo ustaw z lat 1840 i 1846, zakazujących tego procederu, w latach 60. XIX w. wciąż pracowało około 3000 pomocników kominiarzy, gdyż utrzymywano, że czyszczą oni kominy dużo skuteczniej niż zdalnie sterowane urządzenia. Dopiero w roku 1875 bardziej skuteczna ustawa położyła kres haniebnej praktyce wykorzystywania chłopców w charakterze czyścicieli kominów.

W drugiej połowie XIX w. dzięki ustawom fabrycznym oraz działalności związków zawodowych dzieci zatrudnione w zakładach przemysłowych zostały już objęte pewną opieką, natomiast poprawy wymagał byt dzieci pracujących chałupniczo (Trevelyan 1946, s. 484). W latach 80. XIX w. koronkarstwo było najczęściej publicznie atakowane jako przemysł najbardziej wyzyskujący pracę dzieci, lecz już w latach 60. pojawiło się wiele raportów donoszących o tak zwanych koronkowych i słomianych „szkołach" (*lace-making and straw-platting "schools"*). W przybytkach tych dzieci nie uczyły się niczego oprócz wytwarzania modnych, wiktoriańskich koronek lub plecionych koszy, spędzając tam po 12-16 godzin dziennie. Pomimo powszechnej krytyki te chałupnicze warsztaty pracy mogły zostać zlikwidowane dopiero po wprowadzeniu powszechnego obowiązku edukacji podstawowej.

Kolejną grupę zawodową, która przyciągnęła uwagę opinii publicznej, stanowiły dziewczęta zatrudnione przy produkcji zapałek (*match girls*). Była to praca bardzo szkodliwa dla zdrowia z powodu kontaktu z siarką i fosforem, gdyż obie te substancje są nie tylko łatwopalne, lecz wydzielają trujące wyziewy, które mogą doprowadzić do deformacji ciała (Mason 1990, s.144). W latach 70. XIX w. problem ten został nagłośniony w prasie w formie publikacji wielu rysunków przedstawiających młodociane pracownice fabryk zapałek, jak wychodzą z pracy, spowite fluorescencyjnym blaskiem, co było spowodowane kontaktem z fosforem. Wydaje się, że w dużym stopniu to dzięki owej kampanii prasowej wprowadzono ustawę zabraniającą zatrudniania w fabrykach zapałek osób poniżej dziewiętnastego roku życia.

Jednakże *match girls* stanowiły jedynie drobną część populacji dzieci, które dramatycznie potrzebowały ochrony ze strony państwa. Wielu mieszkańców miast dziewiętnastowiecznej Wielkiej Brytanii niemal od urodzenia wiodło życie przestępcze, w którym żebranie, kradzieże i prostytucja wydawały się sposobami utrzymania odpowiednimi zarówno dla dorosłych, jak i dzieci. Chociaż ustawy usiłujące ograniczyć żebractwo zaczęto wprowadzać już w XIV w., zjawisko to przybrało w wieku XIX rozmiar niespotykany kiedykolwiek wcześniej. Chesney (1991, s.237) twierdzi, że „najbardziej odrażającym aspektem żebractwa było regularne wykorzystywanie małych dzieci, często zanim zaczęły chodzić", którymi handlowano i poddawano je specjalnemu szkoleniu. Wysiłki zmierzające do rozwiązania tego problemu, np. założenie Stowarzyszenia dla Zlikwidowania Żebractwa (*Society for the Suppression of Mendacity*) czy wprowadzenie regulacji prawnych, które miały karać żebrzące dzieci, były mało skuteczne z powodu nasilenia zjawiska (Chesney 1991, s.240).

Również kradzieże dokonywane przez młodocianych przestępców, a zwłaszcza ich specjalność, czyli kradzieże kieszonkowe, okazały się niemożliwe do opanowania czy nawet kontrolowania przez wymiar sprawiedliwości. Nierzadko gospodarze domów noclegowych organizowali dziecięce gangi złodziejskie, prowadząc przy tym swoiste kursy przygotowujące do fachu kieszonkowca, jak opisał to Dickens w powieści *Oliwer Twist* (Chesney, 1991, s.111).

Podczas gdy chłopcy zajmowali się kradzieżami, rozbojem i włamaniami, prostytucja głównie dotyczyła dziewcząt. Biorąc pod uwagę warunki życia w slumsach, nie powinien nas dziwić fakt, że niektóre z nich oddawały się tej profesji. Zdumiewającym jest natomiast fakt, że w epoce wiktoriańskiej, zwykle kojarzonej z etycznym i seksualnym purytanizmem, aż do roku 1875, kiedy to podniesiono wiek przyzwolenia (*age of consent*) do lat 13, stosunek seksualny z dwunastolatką nie był wykroczeniem. W latach 1881-82 Komitet Izby Lordów (*Committee on Prostitu-*

tion of Young Girls) przeprowadził dochodzenie w sprawie handlu młodymi Angielkami, które miały pracować w europejskich domach publicznych, lecz dopiero kampania T.S. Steada w 1885 r. poruszyła opinię publiczną do tego stopnia, że spowodowało to ustawowe podniesienie wieku przyzwolenia do 16 lat oraz wprowadziło konieczność ścigania osób dorosłych promujących prostytucję dziecięcą lub z niej korzystających (Chesney, 1991, s.408).

Ustawodawstwo dotyczące edukacji

Państwo brytyjskie nie mogło jednak znacznie poprawić bytu dzieci zarabiających na swoje utrzymanie legalną czy nielegalną pracą, dopóki nie powstał system powszechnej edukacji. Stworzeniu państwowego systemu szkolnictwa pomogło dość powszechne w wyższych klasach społecznych przekonanie, że Wielka Brytania straci swoją przewagę przemysłową nad innymi krajami, jeżeli nie będzie w stanie odpowiednio wykształcić wszystkich swoich obywateli (Cootes 1985, s. 208). W swoim wystąpieniu w Izbie Gmin W. H. Forster opisał edukację brytyjską w następujący sposób: "rezultat oddania przez państwo inicjatywy ochotnikom jest taki, że tam, gdzie pomoc państwa jest najbardziej potrzebna, jest ona najmniej odczuwana" (cyt. za Birch 1974, s. 91, tłumaczenie własne). Komentarz ten odnosi się do istniejącej sieci szkół wyznaniowych, częściowo finansowanych przez państwo, które nie były w stanie zapewnić wszystkim dzieciom elementarnej edukacji. Birch (1974, s. 90) pisze o 60% dzieci z klasy robotniczej w wieku 6-10 lat, których jedyną szansą na jakąkolwiek formalną edukację stanowił pobyt w przytułku (*workhouse*), zakładzie poprawczym, więzieniu czy szkole przyzakładowej.

W celu poprawy sytuacji w 1870 r. Parlament uchwalił ustawę o edukacji (*Elementary Education Act*), która podwoiła środki finansowe przyznawane istniejącym szkołom wyznaniowym oraz wprowadziła nowy typ szkół świeckich dla dzieci w wieku 5-10 lat, tzw. *board schools*, finansowanych częściowo przez samorządy lokalne a częściowo przez rząd centralny. Jednakże dopiero w roku 1880 szkół tych powstało wystarczająco wiele, aby uczęszczanie do nich uczynić obowiązkowym. W roku 1899 przedłużono obowiązek szkolny do 12. roku życia, natomiast w roku 1918 do 14. roku życia. Początkowo rodzice musieli wnosić niewielką opłatę za naukę ich dzieci w *board schools*, którą zlikwidowano w roku 1891, kiedy szkolnictwo podstawowe stało się dostępne i bezpłatne dla wszystkich. Wprawdzie kolejna ustawa edukacyjna w roku 1902 (*Balfour's Education Act*) wyraziła konieczność pomocy finansowej najuboższym na następnym etapie edukacji, ale dopiero w roku 1907 stworzono system stypendialny, dzięki któ-

remu najlepsi uczniowie ze szkół podstawowych mogli kontynuować naukę w szkołach średnich, otrzymujących publiczne granty. W ten sposób powstała „edukacyjna drabina", dzięki której wszystkie zdolne i pracowite dzieci, bez względu na pochodzenie społeczne, mogły zdobyć średnie wykształcenie.

Ustawodawstwo dotyczące zdrowia

Kiedy przymus obowiązkowej edukacji sprowadził do szkół hordy zaniedbanych, głodnych i obdartych dzieci, często cierpiących na choroby zakaźne, okazało się, że wykształcenie nie było ich najbardziej naglącą potrzebą. W niektórych szkołach konieczne stało się zapewnienie tanich posiłków, bezpłatnej opieki lekarskiej oraz rozdawanie używanej odzieży. Dopiero w roku 1907 wprowadzono bezpłatne posiłki szkolne, co należy uznać za jeden z ustawodawczych kamieni milowych w historii państwa opieki społecznej (Morgan 1991, s.108). W celu uporania się z problemami zdrowotnymi poważniejszymi niż niedożywienie, w tym samym roku rząd brytyjski nałożył na władze lokalne obowiązek zapewnienia uczniom szkół podstawowych możliwości skorzystania z bezpłatnych badań lekarskich.

Ponadto podjęto kroki zmierzające do zmniejszenia śmiertelności noworodków i poprawy stanu zdrowia niemowląt. Wydaje się, że wysoka śmiertelność noworodków, zwłaszcza wśród dzieci urodzonych z nieprawego łoża, była związana z procederem „hodowania dzieci" (*baby farming*) (Chesney 1991, s.415). Zajmowali się nim ludzie przyjmujący za opłatą pod swoją opiekę noworodki, których matki nie mogły się same nimi zajmować. Dzieci te zwykle żyły dopóty, dopóki były źródłem dochodu, po czym umierały, wyposażone w polisę ubezpieczeniową wcześniej wykupioną przez ich tymczasowych opiekunów. Jeśli niektórym udawało się przeżyć dłużej, były sprzedawane jako tanie źródło siły roboczej. Proceder *baby farming* próbowano ukrócić poprzez przyjęcie ustawy *The Infant Life Protection Act* z roku 1872 oraz założenie Narodowego Towarzystwa Zapobiegania Okrutnemu Traktowaniu Dzieci (*National Society for the Prevention of Cruelty to Children*) w roku 1884, lecz dopiero w roku 1908 ustawa *The Children's Act* okazała się bardziej skuteczna (Chesney 1991, s. 419). Zabraniała ona kupowania i sprzedawania dzieci, oddawania pod opiekę innych osób dzieci poniżej 8. roku życia oraz kupowania im polis ubezpieczeniowych na wypadek śmierci. Ponadto ustawa ta chroniła dzieci przed wykorzystywaniem i maltretowaniem ich przez rodziców, którym można było odebrać prawa rodzicielskie w przypadku okrutnego traktowania potomstwa.

Zwiększona troska o zdrowie dzieci przejawiła się również w ogólnonarodowym programie ochrony zdrowia, który zawierał promocję szczepień w 1884 r., poprawę higieny przechowywania mleka (*hygienic milk depots*) w 1899 r. oraz zatrudnienie pielęgniarek środowiskowych w latach 90. XIX w. Nadrzędnym celem wszystkich tych działań było zmniejszenie śmiertelności niemowląt (Gourvish 1988, s. 184). Na przełomie wieków pojawiły się również pierwsze ogólnie dostępne place zabaw, parki oraz biblioteki, które dawały miejskim dzieciom szansę na sensowne spędzanie wolnego czasu po zajęciach szkolnych (Trevelyan 1946, s. 545).

Wnioski

Porównanie bytu dzieci w Wielkiej Brytanii przełomu XIX i XX wieku z wizją dobrobytu dzieci przedstawioną w Konwencji Praw Dziecka ONZ z roku 1989 pozwala zauważyć, że podstawowe prawa dzieci do życia, nauki oraz ochrony przed wykorzystywaniem były zapewnione, lub przynajmniej uznawane, w późnej epoce wiktoriańskiej. Jednakże największą różnicą pomiędzy tymi dwoma wizjami wydaje się być samo rozumienie pojęcia „dzieciństwo", a zwłaszcza kwestia wieku, kiedy istota ludzka może być traktowana jako osoba dorosła. Obecnie, tak jak przewiduje to Konwencja, dorosłość zaczyna się w wieku lat 18. Kiedy natomiast dziecko stawało się kobietą lub mężczyzną w epoce przedstawionej w tym artykule? Odpowiedź na to pytanie zależy od tego, co przyjmiemy za atrybut dorosłości. Jeśli bycie dorosłym oznacza posiadanie czynnych praw wyborczych, dojrzałość dla większości Brytyjczyków zdefiniowano dopiero w roku 1918, gdy mężczyźni musieli mieć skończone 21 a kobiety 30 lat, żeby mieć prawo głosować w wyborach powszechnych. Jeżeli bycie kobietą jest równoznaczne z tym, że państwo już nie ochrania jednostki przed wykorzystywaniem seksualnym, Brytyjki stawały się kobietami w wieku 16 lat w roku 1885, lecz już w wieku lat 13 w roku 1875. Za kolejne kryterium moglibyśmy uznać wiek, w którym młodzież już nie musi uczęszczać do szkoły, lecz wtedy Brytyjczycy stawaliby się dorosłymi w wieku 12 lat w roku 1899, ale już w wieku lat 10 w roku 1880. Gdyby wziąć pod uwagę możliwość bycia zatrudnionym, dziesięcioletnich chłopców pracujących w kopalniach w roku 1842 czy nawet dziewięciolatki w fabrykach w roku 1833 należałoby uznać za dorosłych.

Wydaje się, że wnioskiem płynącym z niniejszych rozważań może być stwierdzenie, że chociaż państwo brytyjskie w latach 1870-1908 rzeczywiście zaczęło się czuć odpowiedzialne za dobrobyt swoich najmłodszych obywateli, życie większości brytyjskich dzieci, to znaczy istot ludzkich poniżej 18. roku życia, nie było tak dostatnie i szczęśliwe, jak być powinno w najbogatszym i najpotężniejszym w tym okresie państwie świata.

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LEGISLATIVE CHANGES AIMING TO IMPROVE CHILD WELFARE IN VICTORIAN AND EDWARDIAN BRITAIN

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Abstract: The article addresses the issue of state responsibility for the welfare of children in Britain in the Victorian and the Edwardian periods. Taking into consideration the number of Acts of Parliament attempting to improve child welfare in the years 1870-1908, it seems that it was particularly in this period that the state assumed a considerably greater degree of responsibility for the well-being of its youngest citizens than ever before. Another conclusion of the article seems to be a realization that it is very difficult to compare the standards of child welfare at present and in the nineteenth century, for even the very concept of childhood seems to be in a sense untranslatable. While today we generally regard the end of childhood to coincide with and the beginning of adulthood, both of which happen at the age of eighteen, in nineteenth century and early twentieth century Britain this age might have been as little as nine or ten, if the ability to work was concerned, ten or twelve, if we regarded the school leaving age or as high as twenty-one or even thirty if the voting rights are concerned.

Key words: child welfare, state responsibility, legislation, the Victorian period, the Edwardian period, childhood.

Introduction

In many respects the Victorian Era is crucial in the social history of Britain, for it was then that the most profound changes took place in the structure of British society. The Victorians were the first nation in world history to experience the consequences of the Industrial Revolution, the most important of them being the growth of towns and widening of the gulf between the rich and the poor. It is among the poor that disease, crime and ignorance have always existed, yet never before had they been as concentrated and widespread as in the Early Victorian period. That is why social reform began precisely at this time, after the passing of the Reform Act of 1832. The legislation of the early Victorian years with its new administrative devices had begun a powerful movement for reform "whose own momentum would carry it into the second half of the nineteenth century" (Birch 1974, p. 14).

Children played a very important role in this age that thought much of family life and reared numerous offspring. The enlarged sympathy with children, regarded by Trevelyan (1991, p. 546) to be one of the chief contributions made by the Victorians to real civilization, was used by the promoters of factory legislation to appeal to humanity through compassion for the lot of children employed in factories and coal-mines. This was easily done for the conditions of child labour were hardly imaginable for the upper classes (Lipoński 2005, p.496-497). Children often worked from the age of five for fifteen, sixteen, or even nineteen hours a day, and, allowing for the time necessary to reach the mill, a child would be lucky to get more then four hours' sleep (Wood 1977, p.89).

The Factory Act of 1833, under which children under nine were prohibited to work in all textile factories and older children had their hours of work shortened, through the employment of factory inspectors, established the principle of state intervention between employers and workers. Furthermore, in 1840 the government appointed a Royal Commission on Children's Employment that issued a report revealing to the public the appalling conditions of child labour. Children from the age of five were kept over 12 hours a day in the pits, often sitting in darkness to operate a trap door while older boys, harnessed to trucks of coal, were used like beasts of burden (Wood 1977, p. 116). The Mines Act that followed in 1842 prohibited the employment of girls and boys under ten from working underground. Under the Factory Act of 1844, the working day for children under thirteen was cut to six and a half hours and all dangerous machinery had to be fenced.

Considering the factory legislation of the 1830's and 1840's, it must be acknowledged that it was already then that the state began to take responsibility for child welfare. If "welfare (...) is meant to describe the flourishing or happiness of human

beings" (Scruton 1983, p. 492), eliminating the exploitation of child labour, an evil several centuries old, was rightly the first step taken towards greater happiness of thousands of children.

The main aim of this article is to present the social context in which the state began to take responsibility for child welfare in Great Britain. Moreover, it could be argued that the legislation aiming to improve the welfare of children introduced in the Victorian period was not only a response to the harsh conditions of life but also the beginning of a long process which culminated in the creation of the welfare state after the end of the Second World War. Finally, the article attempts to encourage the reader to compare the concepts of childhood and child welfare in the past with their present equivalents.

Ideology and the welfare state

According to Richard Price (2007, p. 61), it was in the 1870's that "state regulation of key aspects of family life crossed a previously established boundary as it began to assume responsibility of protecting [...] children against certain abuses by [...] parents". Indeed, the late Victorian era, influenced by the political philosophy of J. S. Mill, did make a contribution of its own to the advance of the welfare state. The change took place when politicians realized that charity, religious or secular, had to be replaced or at least supplemented by state action. The attitude is clearly visible in J. Chamberlain's

Unauthorized Programme of 1885: "Politics is the science of human happiness, and the business of a statesman and of politicians is to find out how they can raise the general condition of the people: how they can increase the happiness of those who are less fortunate among them" (qtd. in Birch 1974, pp. 91-92). What Chamberlain seems to imply is that government must act with the welfare of all the citizens of the state in mind, which now seems to be a truism but at that time apparently was not obvious to everybody.

A major breakthrough in the development of the welfare state, influenced by the spreading Fabian assumption that poverty was not connected with the failings of the individual but with the shortcomings of society itself, came in 1906 when, with strong working-class support, the Liberal Party gained a massive majority in the House of Commons. Not surprisingly, child welfare was the first priority of the Liberal Governments of 1906-14 (Cootes 1985, p.240; Price 2007, p. 61).

Child employment legislation

Even though the greatest abuses in the employment of children had been removed by the factory legislation, there still was a lot of child labour exploitation in the late nineteenth century. Indeed, as Himmelfarb (2007, p. 216) claims "we envisage Victorian children as begrimed and ragged, looking like chimney sweeps fresh from their jobs." It could be argued that the working children who attracted the most attention in the Victorian period, partly due to the publication of C. Kingsley's *Water Babies*, were the "climbing boys" of chimney sweeps. Often sold by their mothers or guardians, they were treated little better than slaves. According to Mason (1990, p.166A), they were "almost always cruelly used, starved, beaten and overworked by their masters, and treated as outcasts by all with whom they came in contact". In spite of the Acts of 1840 and 1846, which were feebly enforced and often ignored, in the 1860's there were still about 3000 little chimney sweeps, apparently only because they cleaned chimneys better than remotely manipulated machines. It was only in 1875 that a more effective act prohibiting the use of climbing boys put an end to this outrageous practice.

Since standards of factory life had already been raised by the Factory Acts and Trade Union action, children employed in the domestic trades became the focus of public attention in the late nineteenth century (Trevelyan 1946, p.484). In the 1880's lace was one of the trades that was most attacked as a great exploiter of child labour, but as early as in the 1860's there were numerous reports about children employed in the so-called lace-making and straw-platting "schools", where children did not learn anything but produced the fashionable Victorian lace or platted baskets for 12-16 hours a day. Despite public criticism, these "schools" could only be abolished with the introduction of real elementary schools requiring compulsory attendance.

Another group of children engaged in highly unpleasant employment that attracted enormous attention in that period were the match makers, who earned their meagre living by dipping matchsticks into phosphorus or sulphur. The work was dangerous because of the fact that both the chemical substances were not only inflammable but also gave off poisonous fumes and induced spectacular body deformities, especially of the lungs and jaws (Mason 1990, p.144). Match girls received much publicity in the 1870's in the form of press drawings depicting children pouring out of match works, glowing in the dark, which was another shocking result of phosphorus. This publicity helped to prohibit the employment of people under nineteen in match factories.

However, it could be claimed that an even bigger part of the children population was in desperate need of some help from the state. Indeed, in the nineteenth century there was a multitude of city dwellers who were, from their earliest days, predestined to a life of crime, where begging, thieving and prostitution seemed to be occupations suitable for both adults and children. Although legislation against it began in the fourteenth century, begging was more widespread in the nineteenth century than ever before. Chesney (1991, p.237) claims that "the most abominable feature of beggardom was the systematic employment of young children, often initiated into the business before they could walk." Enhancing an adult beggar's appeal, children were hired, traded and instructed by master beggars (Chesney 1991, p.237). The efforts to deal with the problem, for instance the foundation of the Society for the Suppression of Mendacity or the introduction of legal measures to punish begging children, were mostly ineffective because child beggars outnumbered adult beggars (Chesney 1991, p.240).

Juvenile thieving and pick-pocketing, a crime-specialty of the young, were activities that the police and magistrates were quite powerless to stop or at least control. Not infrequently did house keepers of lodging houses maintain gangs of professional child thieves and ran schools for pickpockets in their kitchens similarly to the one depicted in C. Dickens' *Oliver Twist* (Chesney, 1991, p.111).

While thieving with street stealing and house breaking was what boys specialized in, prostitution was mostly reserved for girls. Considering the conditions of life in the slums, it is not surprising that some children were ready to "exploit their readily cashable asset"; what is astonishing is the fact that in this age of ethical and sexual puritanism, until 1875, when the age of consent was raised to 13, sexual intercourse was legal with a twelve-year-old girl. In the years 1881-82 the Lords' Committee on Prostitution of Young Girls investigated a trade in English girls shipped to work in continental brothels, but it was only the campaign of T. S. Stead in 1885 that moved the public opinion and made the government raise the age of consent to 16 and indict adults taking advantage of or promoting child prostitution (Chesney, 1991, p.408).

Education legislation

The state, however, could not improve the welfare of the majority of children exploited in labour or involved in crime until a national system of compulsory education was developed. Fortunately, the belief that crime was the result of ignorance and the conviction that Britain would lose its industrial

supremacy if the system of education were not improved became widespread among the middle and upper classes (Cootes 1985, p.208). In his speech in the House of Commons, W. H. Forster used these words to describe the existing situation: "the result of State leaving the initiative to volunteers, is, that where State help has been most wanted, State help has been least given, and that where it was desirable that State power should be most felt it was not felt at all" (qtd. in Birch 1974, p.91). Here Forster refers to the existing network of voluntary religious schools, paid for by private subscription and grant-aided by the State, which could not satisfy the need for elementary education. He points to 60% of working class children between the ages of six and ten whose any chance to be subjected to formal education was during their occasional stay in the workhouse, reformatory, jail or industrial schools (Birch 1974, p.90).

Consequently, the 1870 Education Act doubled state grant to existing church schools and introduced Board Schools, which, paid for partly out of local rates and partly by government grants, would provide education for the 5 to 10 age group. By 1880 there were enough schools for attendance to be made compulsory; the school leaving age was raised to 12 in 1899 and to 14 in 1918. At the beginning parents were charged a small fee which was still too high for many, so in 1891 elementary education was made free for all children. In 1902 Balfour's Education Act made secondary schools for the first time a concern of the state, but it was only in 1907 that secondary schools receiving public grants introduced a system of scholarships for the best pupils from the elementary schools. Thus an "educational ladder" had been created for able and hardworking children from any social background.

Health legislation

However, when compulsory attendance brought to school hordes of "brats" who were suffering from infectious diseases, without proper clothing and too hungry to learn, it became evident that there were things more basic than education that those pupils needed. Some school boards found it necessary to arrange for cheap meals, free medical attention and distribution of charity clothing, but it was only in 1907 that the provision of school meals constituted one of the "first legislative milestones of the modern welfare state" (Morgan 1991, p.108). In order to deal with deprived children's health problems other than undernourishment, in the same year the government made local authorities have pupils in elementary schools medically examined.

Attempts were also made to reduce infant mortality and improve the health of surviving children. The high death rate among babies, which was in 1867 eight times higher in those born out of wedlock, must have been connected with the trade known as baby farming (Chesney 1991, p.415). Baby farmers were people who, for a certain amount of money, accepted babies that mothers could not afford to keep. The children usually survived as long as they were a source of profit, but died (insured) or were sold to some employment area when they became a problem. The Infant Life Protection Act of 1872 and the foundation of the National Society for the Prevention of Cruelty to Children in 1884 were the first steps to control this ruthless trade, but more effective was the Children's Act of 1908 (Chesney 1991, p.419). It not only stopped buying and selling children as commodities as children under the age of 8 could no longer be put under care or insured, but also protected children from abuse, by taking them away from their parents if they were treated cruelly.

The health of children was also an objective in a general health programme that included the promotion of vaccination in 1884, establishing "hygienic milk depots" in 1899 and appointing health visitors and district nurses in the 1890's, all of which measures were to promote the infant survival (Gourvish 1988, p.184). The turn of the century was also the time when the first play centres, public parks and libraries appeared in order to give city children an alternative to roaming the streets uncared for after school (Trevelyan 1946, p.545).

Conclusion

Comparing child welfare in the nineteenth and early twentieth century Britain to the vision of child well-being conceived in the United Nations Convention on Children's Rights of 1989, we can see that the basic children's rights to live, learn and not be exploited were already provided or at least acknowledged in late Victorian Britain. However, the greatest difference in the two approaches seems to be the definition of childhood, namely the question of the age when a human being is no longer a child and may be treated like an adult person. Nowadays, as granted in the Convention, adult life begins at the age of 18. But when did a child become a man or a woman in the period discussed in this article? The answer depends on what is considered to be an attribute of adulthood. If being an adult means franchise, then maturity for most British subjects came only in 1918 when males had to be 21 and females 30 to have a right to vote. If becoming a woman equals not being

protected by law against sexual abuse, then English girls became women at the age of 16 in 1885, but already at 13 in 1875. School leaving age might be another criterion, yet then the age would be 12 in 1899 and 10 in 1880. If the fact of being employed were taken into account, then ten-year-old boys in the mines in 1842 and nine-year-olds in factories in 1833 would also have to be regarded as adults.

The conclusion seems to be that, although the state did begin to feel responsible for child welfare in 1870-1908, the life of the majority of children, i. e. human beings younger than 18 years of age, in that period was not as happy as it should have been in the wealthiest and most powerful country of the world.

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Wiesław Romanowicz

POLESZUKS AS AN ETHNIC COMMUNITY

Key words: ethnic community, nation, culture, society

Social, political and economic changes that have been taking place in Europe since the 18th century contributed to the formation of national cultures and directly impacted the emergence of modern nations. The concept of a nation is very difficult to define, and it poses a problematic task for researchers. According to Jerzy Szacki, the concept of a „nation" may denote a variety of communities whose genetic similarity could be debatable. The terms *demos* and *ethos* imply both the population of a state that is undergoing cultural unification as well as a cultural group attempting to form an organised state (Szacki 1999).

There exist vast disproportions in the developmental stages of each national community. The shaping of a nation is a long process, and those processes often take on a different course in the history of particular nations. Both in the past and the present, nations were always in different phases of their development. In addition to „old" European nations that have evolved throughout the centuries as part of a distinctive state structure, there are oppressed nations that make attempts to free themselves from the imposed political framework and form their own states. Yet even the „old" Europe is witnessing the birth of not ethnic, but national groups that press for political autonomy (the Basques) (Turowski 1994).

The historical aspects of the formation of nations are generally known. Each nation has a set of distinctive features, such as language, territory, religion or state. Yet as noted by R. Radzik, the above features had existed in each community for millennia before the concept of nationality was formed. The social and cultural dimensions of those characteristic attributes were very important in the process of forming national identities. The distinctive features of a nation were assigned new functions as the significance of social communication and culture grew, thus providing them with a new social dimension. Subject to the historical and cultural context, different cultural elements contributed to the ascent of a nation. The emergence of objective attributes differentiating one community from another was never a decisive factor in the process of shaping a separate nation, nevertheless,

a greater accumulation of those attributes increased the probability of a distinctive nation being formed in Europe in the last two centuries. In reference to individual communities, it could be said that the same attributes have a different „national dimension" (Radzik 2001).

Despite the above, not all communities were successful in forming a nation. Some of them were even unable to preserve their cultural identity and were often assimilated into the structure of „stronger nations". One of such communities will be discussed in this study. They are the Poleszuks, the indigenous people of the pre-war region of Polesie. In general, the Poleszuks described themselves as „local" people, and this term was officially used in Poland in the interwar period. A „local" community was usually identified in view of two distinctive attributes: an absence of a distinctive sense of national identity and the use of Belarusian and Ukrainian dialects. In my opinion, the above list of attributes should be expanded to include religion as a vital characteristic of the described community as well as a cohesive and unique natural environment in which it lived. In view of the above, the main objective of this study will be to provide an answer to the following, fundamental question: why a distinctive and unique ethnic group like the Poleszuks was unable to form a national community and why did it lose a previously manifested sense of identity and uniformity?

I will base my deliberations on the available resources, mainly the work of ethnographer and sociologist Józef Obrębski. In the 1930s, Obrębski conducted highly original, pioneer field research in the region of Polesie. His findings are an excellent venture point for a discussion on the inhabitants of Polesie whose descendants have been nearly completely assimilated and today, they identify mainly with the Belarusians, the Ukrainians or the Poles.

Ethnic community

The definition of the term „ethnic community" poses as many interpretation difficulties as the term „nation". The essence of ethnicity lies in a sense of group identity and a strong feeling of separateness. Ethnic communities are cohesive, they are bound by strong social ties which makes them fit the definition of a „group". They are sometimes referred to as „ethnies".

Researchers generally agree that the root of ethnicity is a clear-cut division between „us" and „them". „We" have a set of unique and characteristic features that boldly differentiate us from others. The set of distinctive features that will continue to describe a given community is determined by coincidence and circumstance. They could be the language, religion, custom, physical appearance, etc. Most importantly, those attributes have to form

a given community's exclusive asset which clearly differentiates it from other groups, including, or perhaps especially, those that share many similarities (Szacka 2003).

According to A. Kłoskowska, the primeval, traditional ethnic community, i.e. an ethnic group, is closely attached to its territory which has practical value as the basis of the community's material existence, as well as symbolic and magical significance. It is a group of direct, habitual ties marked by neighbourhood relations and a traditional folk culture which is shared by the entire community and is resistant to change. Its members lack historical awareness and self-reflection, but due to close interpersonal relations and habitual similarities in behaviour, they form a tight community (Kłoskowska 2005).

In view of the above, an ethnic group may be defined as a community that shares a number of cultural elements, but which has not developed a sense of historical oneness and intergroup solidarity. All of the above attributes exist and can be identified in the life of every community, but as noted by R. Radzik, the sense of solidarity that binds individuals to the group follows from the relationships between individuals and other group members, rather than the an individual's relations with the group as an ideological whole (Radzik 1996).

The next chapter analyses the constituent features of the Poleszuks' ethnicity in view of the above definition of an ethnic community.

Structural dichotomy of the Poleszuk community

As it was the case throughout the entire *Kresy* region (the borderline territory stretching along Poland's eastern frontier), the social division into two generically separate and isolated social groups of the gentry and the peasants who did not intermix and coexisted side by side only mechanically, was most clearly and radically manifested in Polesie. It was in Polesie that the two opposing social poles came into direct contact: the most noble Polish lords – the princes of the *Kresy* region, and the lowest strata among peasants – the Rusyn *muzhiks*. No other Polish region had a social system that was as powerfully divided into the social castes of *Kresy* lords and their peasant subjects. The two groups did not develop even the most fundamental of social relations, they spoke different dialects and had a completely different set of religious beliefs. In no other Polish region did the gentry flourish with equal vehemence, while the peasants were reduced to a social strata that constituted the perfect antithesis of the lords' excellence. The social structure of Polesie was the purest example of social dichotomy that was characteristic of Poland. It was the most highly developed symbiotic relationship

between two different, alienated and antagonistic worlds that created a single social system of lords and peasants. Throughout Polish history, this region was marked by the most extreme manifestations of both gentry and peasant traditions. It was a region of princes and *muzhiks* (*i.e.* peasants – W.R.) (Obrębski 2007).

Polesie witnessed the birth of social centres which furthered the development of the noble culture and the refined traditions of grand lords and magnates. The most notable examples of the above were Dawigródek, Pińsk, Nieśwież and Słonim.

The only type of human settlements other than grand palaces and noble manors were primitive huts where semi-naked and semi-savage Rusyn *muzhiks* huddled in the smoke of an open fireplace. Lordliness, nobility and Polishness were synonymous in this context. Polishness and culture were synonyms. In no other region, the grand culture of the Polish nobility reached such heights of sophistication as it did in the eastern borderlands where Polishness was limited exclusively to lordly residences and noble manors, and it never reached the still predominantly Rusyn countryside. In no other region, the noble culture was equally oppressive on the local peasant community. Grand manors accumulated all that was most refined, worldly and expensive in Poland and abroad, but the source of that luxury, sophistication, excess and extravagance was the unrewarded labour of the Rusyn *muzhik*. Bonded by servitude in noble manors, the *muzhiks* were forced into hard, physical labour and used primitive, self-designed tools to turn local crops into commodities exported to the same foreign markets that supplied the lavish embellishments of the noble lifestyle. In large magnate estates, an army of servants, stewards and administrators guarded the process in which the life and work of peasants was reduced to the contents of the magnate's treasury, and the magnate's treasury became an essence of the lordly lifestyle (Obrębski 2007).

The lordly economy combined two opposing poles and two separate worlds into a single system. From the structural point of view, it was a social, rather than an economic system. Social ties dominated over material ties. The relations between lords and peasants were not shaped by a free and voluntary exchange of goods and services. The opposite applied: the material functions of the lord and the peasant were assigned based on tradition and a strictly defined set of social roles of the lord – the land owner, and his faithful subjects. The lord reigned supreme. He owned land, people and assets. The peasants' only purpose was to generate that wealth. The lord made a living from peasants' toil, and peasants – from the lord's land. There was no exchange of goods and services between the lord an the peasant, and there was no room for economic circulation. The relationship

between lords and peasants was one of subjugation between the ruler and his subjects, and it created room solely for the peasant's rent and the lord's favour. For this reason, a lordly economy was a tight and self-sufficient economic organism in which production and consumption merged into a continuous and inseparable process, „flowing" side by side (Obrębski 2007).

Between Russia and Poland

In the peasants' eyes, the lord's exploitation of his subjects stood in contradiction with lordly generosity and favour, the same favour which was utterly prodigal and uneconomical when it came to satisfying the lavish lifestyle and culture of a noble manor. This was robbery, and the only difference from an ordinary robbery was that this act of crime was organised, tightly controlled by the police, a substitute for law, and governed less by legal regulations and customs than the need to protect the victim to ensure the continuity of the process. For this reason, the peasants' memories of serfdom were wrought with a feeling of constant danger and uncertainty. „The subjects were punished by mob action. If a lord wanted to kill a man, he would kill him. If he wanted to sell him or exchange him for a dog, he was free to do so. If he wanted a man to live, he would live, if not, his days were numbered" (Obrębski 2007).

The lords' tyrannical power over Polesie peasants gave rise to the stereotype of the lord-oppressor and the „lord's servants" who were directly responsible for the peasants' bondage, suffering and poverty. The Polesie tradition knows no other lords than the „Lachs" (Poles). In a tradition where lordly rule and the lord-oppressor had the most negative connotations on the peasants' scale of collective values, a lord symbolised a Pole, and serfdom was synonymous of not only lordly, but also Polish law. In Polesie, the historical origins of Polishness were associated with oppression and peasant bondage. Serfdom was not a product of spontaneous evolutionary processes of the local Ruthenian and Lithuanian community. It was imported from Poland, it was transferred and installed with the Polish nobility's expansion to Ruthenian territory. Before the Polish-Lithuanian union, Ruthenian peasants, Ruthenian *boyars* and even the Ruthenian *knyazes* (princes) shared the burden of Lithuanian princes' autocracy. The nobleman's Poland may have freed the Lithuanian lords and lordlings, but it also subsumed Ruthenian peasants under serfdom and bondage.

The Polesie peasants' fate was somewhat changed only after 1831 when the Russian authorities realized that the country folk could be an ally in Polish agricultural relations. They imposed a rent on peasants farming land that was awarded to the Russians under a majorate, something that the Polish

authorities had been unable to do since 1790. In 1846, peasants farming private land were subsumed under government control. In 1864, they were granted property rights to the land. A manifesto was published to demonstrate that only the Russian government was capable of effectively amending the peasants' fate.

According to W. Grabski, the country folks' worship of emperors did not originate during the partitions of Poland. It followed from the successive Polish governments' complete inability to provide its common citizens with any kind of legal protection and terming the care exercised by grand lords as favour whose effectiveness was steadily declining (Grabski 1938).

The land reform not only freed the peasants from lordly control, giving them a deserved share of their land and a vast degree of physical freedom. Above all, it revolutionised the peasants' traditional views on the social hierarchy of the world which were shaped within the tight boundaries of a lordly economy. The Russian authorities' intervention into the serf-lord relationship introduced the peasants to the concept of the supreme ruler and lord, the Russian tsar who embodied the traditional features of a grand and beneficent ruler, the peasants' benefactor and vanquisher of their oppressors. The tsar's favour and care superseded everything that the peasants had previously owed to their local lords. It toppled the existing foundations of the hierarchy of lordly rule, turning a lord's serfs into the faithful subjects of the tsar.

From the perspective of the tsar's decree, even the most generous and beneficent Polish lord was a small, vile, „stupid and wicked" man. The tsar's decree dethroned grand lords and replaced them with the one and only super-ruler who reigned on the peasants' social horizon (Obrębski 2007).

Those events left a lasting imprint on the local peasants' memory. They symbolised their perseverance, the victory of Polesie's indigenous people over the grand lords and Russia's victory over Poland. Those events gave rise to myths depicting peasants as indigenous, local people who were strongly attached to the land of their fathers and grandfathers. This was the cradle of their culture which was meticulously passed on in the form of customs and traditions to the successive generations. It was probably at that time that the people of Polesie began to develop interpersonal and neighbourly relations based on a shared fate and a common place of residence. The place of residence became a distinctive feature and a symbol of Polesie's community which later gave rise to the concept of „locality".

Language as a distinctive feature

The census of 1921 showed that a vast number of Polesie's inhabitants were unable to define their national identity. 38565 people declared themselves to be „locals”, Poleszuks and Rusyns, 375220 claimed to be Belarusians, 156142 – Rusyns, and 214052 – Poles. The following census, held ten years later, produced an even higher number of respondents who were unable to define their native language. When asked about nationality, many of them pointed to their religion and claimed to speak a „local” language. This answer was given by 707100 people, i.e. around 63% of the surveyed population. Belarusians and Poles had a visibly smaller share of the local community in comparison with the census of 1921 (Tomaszewski 1985).

A low level of national identity was also a characteristic feature of the counties of Nowogród, Wołyń and Białystok, adjacent to Polesie. It was not uncommon in other regions of Poland. An ethnographic study of Polesie's community was carried out in the interwar period. It involved direct field work with the aim of mapping differences between Belarusian and Ukrainian languages. This was no easy task as only some northern Ukrainian (Poleszuk) dialects preserved the characteristic features of this language group in a relatively pure form. The majority of dialects were transitional forms between the southern group of Ukrainian dialects and the neighbouring Belarusian dialects. The results of the study suggested that all of the above dialects, although marked by significant differences, should be regarded as a „separate dialect in the Slavic language group”.

The study investigating the national identity of Polesie's indigenous people had to be based predominantly on the statements of „outsiders” rather than the very few documented declarations of the Poleszuks themselves. The inhabitants of the Wołyń region had a deeply rooted sense of separateness from both the Belarusians and the Rusyns (Ukrainians). In northern Polesie, the people of Łuniniec declared themselves to be Poleszuks, but referred to their neighbours from the nearby area of Kleck as Belarusians or Poles residing in the country of „Pol” (...). For reasons of simplification, the indigenous people of Polesie were sometimes divided into two linguistic groups: the northern Belarusian group and the southern Rusyn (Little Russian or Ukrainian) group. The criterion applied in the above classification was the „softness” (Belarusian) or the „hardness” (Ukrainian) of pronunciation. The river Prypeć, considered to be the natural boundary separating the two language groups, could not prevent the mutual permeation of influences. The culture of the Little Russians inhabiting the Wołyń area of Polesie differed substantially from the traditions of the Rusyns settled furthered down to the south. Their dialect from the north Ukrainian group became decomposed into „several transitional dialects moving in the direction of the

Belarusian dialect or related to it". The Poleszuks' weakly developed national identity was characterised by a sense of separateness and unique syncretism. This dilemma was often encountered by people who declared themselves to be Ukrainians, Belarusians, Poles or Russians, subject to circumstances (Wysocki 2009).

Religious beliefs of the Poleszuk community

In the pre-Christian era, the Slavic people were not familiar with church structures, and they did not have a defined concept of priesthood. They worshipped mostly astronomical phenomena and forces of nature, building wooden and stone statues for their gods. The cult of Perun, the god of thunder and lightening, was most widespread among the eastern Slavs. The difficult weather conditions encountered daily by the tribes inhabiting the area between the rivers of Prypeć and Niemen shaped a concept of beneficent and maleficent spirits in the collective consciousness. The Slavs were familiar with many spells for keeping evil spirits away, cursing or blessing people.

According to W. Szafrański, farmers ascribed souls to all forces of nature and relied on magical practices to influence the „spiritual" atmospheric phenomena and celestial objects to win their graces and guarantee the success of their business endeavours.

The life-giving sun was the object of the highest worship. It was depicted as a solar ring, a solar disc, but it also took on the form of various animals, such as the ox, horse, swan or duck. Those zoomorphic representations were a relic of totemism which is characterised by a belief that man is related to animals or that mankind has animal ancestors (Szafrański 1988).

After the Christianisation of the Kievan Rus, the local people were converted to a new religion. Christianity arrived from the Byzantine Empire, and the descendants of the Poleszuks became natural followers of Orthodox Christianity.

In 1303, Halicz prince Jerzy I was granted the consent of the Patriarchate of Constantinople to establish a separate metropolis seated in Halicz. This led to the creation of dioceses, archpriestships (decanates – administrative districts of ten churches) and parishes. Historical sources indicate that archpriestships were seated in state capitals, administrative and judicial units, regional and provincial capitals. Administrative centres with a high number of Orthodox churches and priests were a natural candidate for this role. One of the archpriestships was seated in Brest (Mironowicz 1991).

The above suggests a high number of Orthodox parishes in the Brest area. The establishment of parishes led to the gradual management of land

and Rusyn settlement, but it did not always reflect the religious needs of the local population. Prestigious and property considerations played a very important role in the process. The founders of Orthodox churches had the right of patronage which gave them practically unrestricted control over the clergy. The aristocratic strata of society had different origins, and they exerted a massive influence on the social and religious development of the local people. The most notable aristocratic families in Polesie were the Sapiehas, powerful estate owners in the area of Kodeń and Bociek, the Sanguszkis and the Chodkiewiczs.

The Catholic church had a different status in the discussed region. When Władysław Jagiełło became the king of Poland, he vowed to Christianise the people of his country. After the formation of the Polish-Lithuanian union, Jagiełło personally led a Polish clergy's mission to Lithuania (Kłoczkowski 1986).

The first Catholic dioceses were established in Vilnius and Halicz in the late 14th century, but they were quickly moved to Lviv. According to J. Kłoczkowski, the above paved the way to a peaceful coexistence between Catholic and Orthodox church followers and the merging of Western and Eastern Christian traditions (Kłoczkowski 1990). A great number of parishes were built on Rusyn and Lithuanian territories in the 14th and 15th centuries, yet they differed in size and affluence. Small Catholic congregations were served by a very modest number of priests.

In the 16th century, the Catholic church made attempts to subjugate Orthodox followers in the eastern borderlands of Poland. Polish kings also had an interest in this process. They hoped to strengthen the rule of the state by bonding the Rusyn Orthodox population to Poland. The Union of Brest was proclaimed in 1596. Rusyn bishops from the territory of Poland acknowledged the Pope's supremacy and Catholic dogmas, but they retained the Eastern liturgy, the Julian calendar and Orthodox traditions (...). The union was to cover all Orthodox dioceses in Poland, but it was finally set up in 6 dioceses, and it was rejected by the bishops of Lviv, Przemyśl and Łuck (Wójcikowski 2005). The dispute between Eastern Rite Catholics and Orthodox followers continued for many years. It was used by Tsarina Catherine who, already in 1795, dissolved Eastern Rite dioceses on Polish territories annexed by Russia under the pretext of protecting the Orthodox church (Wójcikowski 2005).

The voluntary and compulsory conversion of Eastern Rite Catholics to Roman Catholicism soon gained speed, but the real issue at stake was more than religious beliefs. Linguistic, ethnic and cultural differences were still an obstacle to the equal treatment of the Eastern Rite Catholics who were discriminated in legal, property and daily life matters. The above was a conse-

quence of the Eastern Rite priests' belief that they were a part of the Catholic clergy. Unfortunately, the Catholic clerics did not subscribe to this sense of spiritual unity (Mironowicz 2005).

The material status of the Orthodox Church did not change after the dissolution of the Union of Brest. The authorities placed the landowners under the obligation to build shrines, keep the clergy and Orthodox schools. Catholic landowners were not interested in the spread of Orthodox influences. In 1842, the Tsar deprived the clergy of their property and became the sole supporter of both Orthodox and Roman Catholic priests. This decision did not give equal rights to Orthodox and Catholic clerics. Most Orthodox followers were inhabitants of rural areas, while Catholic believers constituted landowners and the nobility. The latter gave generous financial and political support to the Catholic clergy. The belief that the Orthodox faith was a religion of the common folk, while Catholicism was a faith of the nobility became deeply rooted in social consciousness (Mironowicz 2005).

According to J. Obrębski, in addition to the deep-rooted principles of the Poleszuks' family life, the Orthodox faith is the second most important factor that prevented individuals from adopting new social ideas and values. The above holds true despite religious indifference or laicisation which leads to the rejection of rural Orthodox dogmas, even agnosticism. The Poleszuks' religious revolutionism was based mainly on the rejection of old rules, moral and legal standards which were discarded as the former principles of social life became obsolete. The fact that the peasants' traditional legal and moral norms had powerful religious connotations made those manifestations of individualism a sacrilege. Despite the above, the religious organisation of life was not affected and it continued to thrive despite many transformations. Through ritual and ceremony, religion pervaded nearly every area of the peasants' life (Obrębski 2007).

Obrębski claims that religious traditions bordering on the realm of magic were closely related to various areas of daily life (family, business, social, recreational), thus introducing a certain degree of order without which rural life would have descended into chaos. Orthodox followers were not the people who performed their religious practices in Rusyn, they were not the people who emotionally participated in the religious and magical rituals of the rural Orthodox tradition, but those who began and ended their work with others, those who observed calendar holidays and participated in social life, in short – those who synchronised their lives with the existence of others in line with traditional, becoming active members of the rural, local and provincial community (Obrębski 2007).

Protestantism was the third Christian movement to have spread in the Poleszuk community. The exact number of Protestants in Polesie is un-

known due to an absence of reliable data. Many Protestants were never registered, while others were often listed as Orthodox believers. Polesie's Protestants buried the dead without the involvement of the parish priest, many of them did not report stillbirths, as the result of which parish records ceased to be an accurate reflection of the local population. The numbers describing each religious congregation quickly changed over time, some groups were marked by a growing tendency, while others seemed to disappear. Selected statistics could, at least in part, make a reference to the same communities under different names. According to official sources, the number of Protestants in Polesie increased from around 0.5% of the total population in 1921 to 1.5% in 1931.

In general, the vast majority of the Poleszuks identified with Eastern Christian traditions in the Orthodox or Eastern Rite form. Those movements were more consistent with the local people's expectations as regards both their daily lives and religious needs.

To conclude, a brief reference should be made to the Poleszuk community's attempts to stage a nationalist campaign. The most recent and probably the best known national organisation in the region was the Polisje Social and Cultural Association of the Poleszuk Community, founded in 1988 by Mykola Shelahovitch. According to R. Oryszczyszyn, the transfer of the nationalist rhetoric to local ground did not bring the anticipated results, mainly due to problems with establishing the Poleszuks' national identity. According to the association, the Poleszuk population, estimated at 1.5 million, descended from the Yotvingians. This claim was probably made in an attempt to set a clear ethnic boundary separating the Poleszuks from the neighbouring Belarusian, Ukrainian and Polish communities, which seems highly improbable in the light of scientific evidence. The Polisje Association considered the Polesie dialect to constitute a separate language, and it even published a magazine in this dialect. A minor campaign was staged for the creation of a separate Polesian state covering a vast area of Belarus and Ukraine as well as the eastern edge of Poland. The leaders of the movement proclaimed the Poleszuks' ethnic separateness from the Belarusians and the Ukrainians. The movement had very limited coverage, and it did not gain the support of Polesie's people (Oryszczyszyn 2003).

I am aware that this article paints a very selective and fragmented picture of the unique ethnic group of the Poleszuks. I would like to address the following postulate to researchers representing various scientific disciplines: the region of Polesie requires an in-depth investigation to preserve from oblivion the history and culture of the Polish-Belarusian-Ukrainian borderland which profoundly impacted its contemporary people.

Abstract

The contemporary Poleszuk community is a poorly documented ethnic group with a weak sense of national identity. This study aims to describe the characteristic features and the culture of this unique ethnic community. It discusses the way of life, the typical activities and the relations binding the indigenous people of the former Polesie voivodeship. By living in harmony with nature and overcoming the hardships of daily life, the Poleszuks formed a unique and separate ethnic enclave. Despite its scientific inaccuracy, the term „local" has a wealth of meanings that encompass tradition, language, customs, material culture, religion, way of life, cultural values and world views.

The presented discussion is based in its entirety on the work of interwar ethnographer and sociologist Józef Obrębski. His findings are an excellent venture point for a discussion on the inhabitants of Polesie whose descendants have been nearly completely assimilated and today, they identify mainly with the Belarusians, the Ukrainians or the Poles.

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IN SEARCH OF A NEGOTIATION PARADIGM

Key words: negotiations, paradigm, dilemmas of negotiation science

"Paradigm" is a notion that is frequently used in discussions dedicated to the issues of science. A particular role of a paradigm results from the fact that it appears in the context of determining the level of advancement of a given scientific discipline. A similar role is played by a paradigm in relation to negotiations, while negotiations are not understood as a set of activities of interrelated parties, linked with common and different interests, undertaken in order to solve a perceived conflict of interests existing between them, but as a science dealing with the analysis of this phenomenon. The only attempt to characterize a negotiation paradigm has been taken by R.A. Rządca in his book entitled "Negocjacje w interesach. Jak negocjują organizacje" *[Negotiations in interests. The way organization negotiate]* (Rządca 2003). In the first chapter, entitled "Negotiation – a dominating paradigm", he reconstructs – as he claims – "a dominating paradigm of negotiations, in Kuhn's meaning of this term" (Rządca 2003, p. 8). A negotiation paradigm, according to the author, includes eleven statements gathered into two groups. The first group contains statements "related to the issue of negotiations and answering the question of what negotiations are about" (Rządca 2003, p. 33). These are the following statements:

1) Negotiations are a manner of conduct in the face of a conflict and mutual relations.
2) Negotiations are a complex social process.

The second group contains statements concerning "possibility of cognition, of analysing a phenomenon that is of interest for us" (Rządca 2003, pp. 33-34). R.A. Rządca assigns nine statements into this group:

1) The process of negotiations includes making offers (demands), obtaining information about the needs of the other party, convincing and withdrawing.
2) Negotiators behave (not always) rationally (but they should).
3) Negotiators move between two points: the aim and the point of resistance.
4) The aim of each party is to maximize its share.

5) Negotiations create a chance to achieve common and different aims through problem solving.

6) Behaviours of the parties are also modelled by immaterial variables and aims.

7) Relations between the parties affect the talks conducted by the parties, and the talks affect relations between the parties.

8) Ethics determines limits of what is permitted in negotiations.

9) Negotiations are the matter of the parties. Intervention takes place when parties cannot reach the conclusion.

Do the statements presented above deserve to be called a negotiation paradigm? The analysis of the issue carried out in this article will be used as a basis to formulate more general conclusions concerning the current state of advancement in negotiation science. However, before the discussion concerning the subject matter begins, it seems necessary to present some remarks concerning Kuhn's understanding of the term "paradigm".

Kuhn's understanding of the notion of a "paradigm"

Making an effort to "reconstruct a dominating paradigm of negotiations in Kuhn's understanding of this term", R.A. Rządca does not discuss views of T.S. Kuhn or of his many sympathizers and critics. He does not refer either to any works of this author, or to numerous publications that appeared during the broad, almost fifty-year long discussion devoted to the phenomenon of a paradigm. It seems therefore necessary to put into words a few observations concerning the manner of understanding the notion of a "paradigm" by T.S. Kuhn. It was used for the first time by T.S. Kuhn in the work entitled "The structure of scientific revolutions", which appeared in print at the beginning of the 1960s (Kuhn 1968)[1]. This is a basic element of a theory created by the author, which emerged first of all with natural sciences in mind to illustrate the mechanism of its development. Kuhn, who was interested in exact science, and more precisely, in physics[2], carried out an analysis concerning the mechanisms of science development on the basis on observations in this field. The beginnings of his interests in this issue are connected with his preparations to deliver a cycle of lectures concerning sources of the 17th century mechanics, during which he took on establishing what the predecessor of Galileo and Newton knew about mechanics. In this way, he began investigating the questions of motion in Aristotle's "Physics". He

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[1] *The structure of scientific revolutions* was published in 1962. Its Polish translation dates back to 1968.

[2] T.S. Kuhn was a physicist by education. He wrote his doctoral thesis in physics.

commented on his observations made while investigating achievements of Aristotle and of his successors in the following way: "Like the majority of previous historians of science, I examined those texts, referring them to my own knowledge about physics and about Newton's mechanics…just like them, I asked a question referring to these texts: what was known about mechanics within the Aristotle's tradition and what remained to be discovered by the 17th century scientists? Those questions were formulated in Newton's categories; they required answers in the same language, and those answers were clear. Even on a descriptive level, Aristotelians did not know much about mechanics, and most of what they had to say was wrong… Aristotle, dealing with other issues than physics, was a sharp-witted observer. Additionally, in such fields as biology or social behaviour, his interpretations of phenomena were deep and insightful. Why were these abilities failing when he was dealing with motion? How is it possible that he said so much, as it may seem, nonsense about this subject? And first of all, why were his views treated so seriously by his past successors?… Galileo or Cartesius, who laid foundations of the 17th century mechanics, had their roots in the tradition of the Aristotle's science… But the key to their achievements was finding a new method of reading texts… This change was referred to by Hubert Butterfield as "adopting at a given moment of a different thinking attitude" (Kuhn 1985, p. 13). T.S. Kuhn describes this specific thinking attitude, different from the previous manner of perceiving the reality under examination, using the term of a "paradigm".

The concept of T.S. Kuhn brought about a great commotion in scientific circles, winning many keen followers and opponents. Of course, relations between achievements of Aristotle and of his successors, Galileo or Cartesius, were not an immediate reason for this interest. It was aroused by the attempt to answer the following questions: What is the role of tradition in the development of scientific knowledge? What is its carrier? How is it transferred or broken? (Amsterdamski 1985). T.S. Kuhn assigned a key role in explaining this mechanism to a paradigm. But the notion of a paradigm in the work in which this term was introduced, i.e. in "The structure of scientific revolutions", has not been clearly defined. M. Masterman, who has taken pains to analyse all meanings which were given by T.S. Kuhn to the notion of a "paradigm" in "The structure of scientific revolutions", distinguished twenty-two different methods of understanding of this notion – from a commonly accepted scientific achievement, to a set of characteristic beliefs and prejudices, instrumental, theoretical and metaphysical (Masterman 1970). In one of his subsequent works "Dwa bieguny. Tradycja i nowatorstwo w badaniach naukowych" *[The essential tension: Selected studies in scientific tradition and change]*, T.S. Kuhn, fully accepting the objection con-

cerning the lack of explicitness of the notion created by him, wrote: "Even if, while writing my book, I do not understand perfectly well what paradigms are, I still believe that they deserve a lot of attention" (Kuhn 1985, p. 407).

Although the title of T.S. Kuhn's work in which he introduces the notion of a paradigm is "The structure of scientific revolutions", the author does not talk about revolutions in science in this book, but refers his considerations to scientific disciplines. A paradigm, in the view of T.S. Kuhn, fulfils a particular role in the development of a given discipline, since it emerges in close – both physically and logically – vicinity to the notion of "scientific community" (Kuhn 1968). "It specifies what is common to all members of a given scientific community and only to them. And the other way round, having a given paradigm makes a group of otherwise dispersed persons, such a community" – T.S. Kuhn claims (Kuhn 1985, pp. 407-408). It is "a set of characteristic beliefs of the community of scientists, its working "tools" ...*consensus omnium* (uniformity of beliefs – JK) of the group, facilitating a fast progress, without returning to already established issues" (Amsterdamski 1985, p. 491). Scientists, whose research is based on a common paradigm, conform to a specific way of thinking about a given phenomenon. There exists a consensus[3] between them, regarding the subject of research, posing questions and the method of recognizing the phenomenon analysed. In the opinion of T.S. Kuhn, followers of various paradigms speak different languages, expressing different cognitive convictions, corresponding to various worlds (Kuhn 1985). "Changes of paradigms result in a new view on the entire field of research, its restructurization, interpretation of facts previously accepted, which become something else than they used to be" (Amsterdamski 1985, p. 492). Therefore, a paradigm is of crucial importance from the point of view of the progress in a given discipline. Its form proves its maturity, creating a necessary condition for granting a discipline a role of "institutional science" (*normal sciences*). Further development of the discipline takes place through the appearance of new paradigms, considered to be more appropriate. In this situation, some scientists remain faithful to old opinions, while others become followers of new ideas. Works of scientists who did not keep pace with a new paradigm cease to be attractive, and their carrier collapses. In this sense, a paradigm is "responsible" not only for the development of the discipline, but also for the career of individual researchers.

The analysis of features given by T.S. Kuhn to the notion of a paradigm is crucial if we want to explain the nature of a paradigm, in Kuhn's under-

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[3] In the initial version of *The structure of scientific revolutions,* a paradigm was referred to using the term of "consensus". "Consensus" was replaced with "paradigm" only during the final phase of working on the book.

standing of this term. For Kuhn, a paradigm is exceptional, hegemonic, occasionally changing and at the same time arranging knowledge in many fields. "In the period, which in *The structure of scientific revolutions* I described as pre-paradigmatic – T.S. Kuhn claims – representatives of the discipline are divided into a range of schools, fighting with each other, each of whom sets up claims to be competent in a given subject matter, but approaches it in a completely different way. After this phase of development, a relatively quick transition takes place to the so-called paradigmatic period. It happens usually as a result of an important achievement. This period is characterized by disappearance of all or of almost all schools, which allows for much more effective operations of members of the remaining society" (Kuhn 1985, p. 408). A monopolistic domination of a paradigm is the most important theoretical objection advanced to the conception of T.S. Kuhn, mainly by representatives of social sciences. A sceptic relation towards this point of view is expressed, among others, by the translator of the Polish edition of "The structure of scientific revolutions", S. Amsterdamski. In his "Afterword" to the work of T.S. Kuhn, he reflects on the question whether the thesis claiming that it is possible to distinguish such periods in the development of individual disciplines in which all researchers accept a common paradigm is legitimate. He elaborates on this thought at the occasion of publishing in Poland of another Kuhn's work "The essential tension: Selected studies in scientific tradition and change", when he writes: "If the notion of a paradigm as applied to natural sciences was to indicate, regardless of how satisfying, a phenomenon that has not been recognized so far – functioning of historically changeable *consensus omnium* within them, then in relation to various schools in the humanities, this is nothing more than an introduction of a new, fashionable name, and moreover, it is done in a way that is inconsistent to its content, since a disciplinary *consensus omnium* itself does not usually exist in these disciplines. Even more: specifying that they are undergoing now a "paradigmatic" phase ensures that creation of such at least disciplinary *consensus omnium* becomes their aim, which, perhaps, they may realize or should realize. Meanwhile, I believe, that the aim of those disciplines is exactly working out of v a r i o u s (emphasis of S.A.) visions of the world, and that they live because of their "multiparadigmatic character", while development of *consensus omnium* in those disciplines would mean their end" (Amsterdamski 1985, p. 513).

Kuhn's way of understanding a paradigm, assuming its monopolist domination (hegemony with a discipline which it relates to) makes the usage of the term "dominating paradigm", applied by R.A. Rządca, sound as proverbial tautology. A paradigm, according to T.S. Kuhn, is therefore, due to its nature, a type of consensus in relation to a given view, which becomes thus

a dominating belief for a common scientific community. The question whether one can talk about "a dominating paradigm", and if so, in what situations, becomes then a rhetorical question, since for T.S. Kuhn, a paradigm is a dominating view out of its nature.

Thus, is it justified at all to use the term "a dominating paradigm"? It is acceptable to talk about a dominating paradigm in the meaning in which the term "paradigm" is often used nowadays in social sciences. With time, this notion gained a slightly different interpretation, other than Kuhn's understanding. As emphasized by S. Olson, it has been distorted, in certain sense, by social researchers. It became a synonym of a school of thoughts or a model. For this reason, we can observe the existence of many paradigms within one discipline, as well as the occurrence of competing paradigms, instead of one paradigm that would be common for many disciplines (Olson 1997, p. 43). In this new meaning, we can talk about a dominating paradigm. Certainly, this is not the understanding which is given to the notion of a "paradigm" by its originator, T.S. Kuhn.

Negotiation paradigm – critical analysis

Previous considerations indicated that "a dominating paradigm in Kuhn's understanding of this notion" is not a very relevant expression. In this situation, for purposes of further analysis, let us assume the method of understanding negotiation paradigm proposed by R.A. Rządca. He describes a negotiation paradigm as "a dominating method of perceiving negotiations, a binding assumption concerning what negotiations are and how they can be analysed or recognized" (Rządca 2003, p. 8). Let us follow therefore, to what extent it is consistent with view of authors dealing with this subject matter. The analysis will allow us to answer the question whether a set of theses, referred by R.A. Rządca by using the term of "dominating negotiation parameter", contains commonly accepted beliefs that do not raise any controversies. Due to a limited size of the present paper, it is not possible to evaluate every statement posed by R.A. Rządca.[4] However, most of them require an implicit commentary. Let us start with first two statements, which, in the opinion of their author, "concern the issue of negotiations and answer the question what negotiation are about", i.e. the first statement, claiming that "negotiations are a manner of conduct in the face of a conflict and mutual relations" and the second statement, assuming that "negotiations are a complex social process".

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[4] A chapter devoted to a paradigm of negotiation covers eighty pages of text in the thesis discussed.

Negotiations are inseparably related to the phenomenon of conflict. This relation does not raise any doubts of authors expressing their opinions in the subject of negotiation. They are unanimous as to the fact that a causative factor of negotiations is a conflict between the parties, and the parties to this conflict are interrelated. There is nothing to discuss without a conflict; and in turn, mutual relationships of negotiation parties means that none of them is able to achieve the aim it assumes without the participation of the opposite party. While conflict, as a causative factor of negotiations, does not raise any doubts among authors dealing with the subject matter, essential differences appear as regards the scope of interest in the conflict itself, which is, to various extents, the object of interest for authors dealing with negotiations. Sometimes, it does not constitute a subject of deeper analysis, since it is assumed to be treated as a given one (*e.g.* Fisher *et al.* 2004; Lewicki and Litterer 1985; Mastenbroek 1996; Ury 1995); in other cases, on the basis of the assumption that the structure of conflict situation influences, to a significant extent, chances of reaching an agreement and affects course of talks, the interest in conflict is much deeper. The issue of the dilemma concerning this question, which can be found in literature, is well rendered by the position of R.A Rządca, who reveals the absence of the univocal character of opinion, presenting contradicting positions. He claims that "conflict is treated as a given one – its sources are not very important" (Rządca 2003, p 34), and immediately adds, "on the other hand, features of a conflict situation affect the course of talks" (Rządca 2003, p. 35). Controversies among authors dealing with negotiations also concern the notion of a "conflict". For some of them, "it exists when persons are engaged in competition to achieve contradictory aims, or aims that are perceived as such" (Moore 1996, p. XIII). For some others, it means "severe incompatibility of interests" (Lewicki *et al.* 2005, p. 33). Pursuant to the former of the approaches presented, conflict requires involvement, and its creation is not possible without an active attitude of parties. However, when understood as incompatibility of interests, it exists objectively, regardless of the activity of its participants, which is not a necessary element to talk about the occurrence of a conflict. In addition, some authors understand each conflict as a conflict of interest, which means that conflict and conflict of interests are synonymous notions for them. For others, a conflict of interests is one of a few types of conflicts apart from the conflict of relations, values, structure and data (Moore 1996), which means that not every conflict is a conflict of interests out of its nature. This distinction is of basic importance if we want to arrive at a precise definition of situations in which the rise of negotiations can be talked about. For some people, any conflict can be the reasons for starting negotiations, since each conflict deals with interests, as out of its nature, conflict is a conflict of

interest. For other people, not all types of conflict form a basis to look for a solution through negotiations. While investigating further the differences in opinions found in the literature, it can be noticed that also the notion of "interest" can be understood in various ways. R. Fisher and his co-authors equate it with the notion of the "need", claiming that "The most important interests are basic human needs" (Fisher *et al.* 2004, p. 85). (If we assume that these notions are identical, then why do we not talk about conflicting needs when talking about negotiations?). For others, interests are a recognized need. Generally, with reference to the notion presented, a large freedom of interpretation can be found in literature. At the same time, the authors are not especially prone to engage in polemics with the views of authors presenting a different point of view, silently accepting the lack of unanimity in understanding basic notions.

Let us move to the second statement, assuming that "negotiations are a complex social process". It can be easily noticed that this statement is contradictory to the first one, which assumes that negotiations are the way of conduct in the face of a conflict and mutual relations. This means that they are a particular type of conduct aimed towards other people, therefore – a social activity. If we accept this assumption, then negotiations cannot be described as a social process. The notion of a "social process" is reserved in social sciences for phenomena occurring in the sphere of social development concerning changes in the entire society; it refers to its history and is most related to such terms as social change, development and social progress. A social process is a sequence of social changes, following one another, which may concern the structure of society that takes place, *e.g.* as a consequence of its aging or in relation to economic migrations of young people abroad. They can be also the effect of growing social inequalities, being a result of the enrichment of one group and impoverishment of others. The notion of a social process does not, therefore, concern the behaviour of individuals, but as P. Sztompka claims, "the entire level of the society's dynamics" and it is reserved for phenomena of a mass character (Sztompka 2002). The entity participating in a social process is anonymous, thus the analysis of social processes is based on assuming the principle of anonymity of the individuals. In negotiations, as well as in management sciences, the examined entity is not anonymous. Assuming the thesis that negotiations are a social process would move away the interest in this subject matter from the area of management science, where the subject of interest is a precisely identified object.[5] Negotiations are a phenomenon originating from the

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[5] The principle of anonymity of an individual seems to be more typical for the discipline of economy (it particularly concerns theoretical economy) than for management science.

sphere of interpersonal relations. They concern the behaviour of individuals and small social groups. Such terms are used in their description as: behaviour, actions, social activity, interaction and social relations. They are a particular type of social activity, a behaviour directed towards other people, therefore they can be described using the term of social activity.[6] This activity is of an interactive character, which is the reason why the best definition for negotiations seems to be the notion of a "social interaction". And this is the way in which most authors describe negotiations. R. J. Lewicki, J.A. Litterer, D.M. Saunders, J. Minton claim that "the majority of real negotiations are in fact complex social interactions" (Lewicki et al. 1993, p. 289). Thus, negotiations should be defined in this way, and not as a social process.

If the literature describes negotiations as a process, it is used in the meaning which is given to the notion of the "process" in the theory of decision taking or in the communication science. This term is used each time in situations when an element of multi stages appears and when we deal with the occurrence of individual phases following one another (*Słownik...* 1979, pp. 926-927). Therefore, *e.g.* decision taking, communicating or learning are all processes. In this meaning, negotiations can be described using the term of a process. While defining negotiations, we can distinguish individual stages (phases) following one another. That is the reason why they are described in literature according to this basic way of understanding the notion of a "process". L. Thompson, quoted by R.A. Rządca, understands negotiations in this way. Like many other authors, she clearly differentiates between the process of negotiations and negotiations themselves, treating the process, understood as what happens between the parties, as their crucial element. That is, besides the parties, the alternatives held by them, negotiating issues, interests, positions and the outcome of negotiations are important analytic elements of negotiations (Thompson 1998).

Let me conclude this part with one more comment. R.A. Rządca claims that "negotiations are a *complex* (emphasis by JK) social process". The term "complex" suggests that social processes include processes that are not complex, *i.e.* some of them can be considered as simple processes. Due to their nature, all social processes are complex. Therefore the term "complex social process" proposed in relation to negotiations should be considered as a not very accurate term.

To sum up, the usage of a term "process" with reference to negotiations can be justified only when it refers to the basic understanding of this notion, which takes into consideration a multi-stage character of the phenomenon, *i.e.* in the meaning which is given to it in the decision making theory or in

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[6] The notion of a social activity, understood as an activity directed towards other people, was introduced to the language of social sciences by Polish sociologist, F. Znaniecki.

communication science. However, it seems incorrect to use the term "social process" while referring to negotiations, since this notion is reserved for changes occurring on the scale of the entire society. In particular, it is improper to define negotiations as a "complex social process", because all social processes are in their nature complex ones. It would seem most appropriate to apply term of "social interaction" while referring to negotiations.

Let us move now to discuss selected statements from the other group. The first statement says that the "process of negotiations includes making offers (demands), obtaining information about the needs of the other party, convincing and withdrawing". Let us examine the first of the components of this statement, *i.e.* making an offer (a demand), since negotiations are most often identified with this element. Let us therefore answer the question whether making offers (demands) is a necessary condition of each negotiations. R. Fisher, W. Ury and B. Patton from Harvard Negotiation Project in their bestselling work "Getting to Yes. Negotiating agreement without giving in" prove that conducting negotiations on the basis of offer making is not the only or the best way to reach a wise agreement. According to them, offers are a typical tool only in the so-called soft negotiations. "In a soft negotiating game the standard moves are to make offers and concessions" – they claim (Fisher *et al.* 2004, p 37). However, a hard game, being the opposite of soft negotiations, is more based on using threats. While answering the question whether to use soft or hard negotiation game, they say: "Neither. Change the game" (Fisher *et al.* 2004, p. 40). They propose an alternative method of negotiations, designed especially to reach a wise outcome in an effective and amicable way. This method is referred to by them as principled negotiation or negotiation on the merits. Besides a few generally known rules which they propose, they assume the possibility to resign from making an offer (demands). "It would be a mistake to assume that making an offer is always the best way to put a figure on the table – they claim (Fisher *et al.* 2004, p. 224). It would be much better to *anchor* the discussion early around an approach or standard favorable to you" (Fisher *et al.* 2004, p. 224). „...the firmer you suggest early figures to be, the greater your damage your credibility as you move off them. It is safer and at least as effective to say something like: *Well, one factor to consider would be what others are paying for comparable work. In New York, for example, they pay $ 18/hour. How does that sound?* Here you have put out a standard and a figure without committing to it at all – the authors claim" (Fisher *et al.* 2004, p. 225). Therefore, making offers (demands) is not a necessary condition of negotiations. What is more, in numerous cases, it can make it difficult to carry out a nego-

tiating strategy, which should be based on a win-win strategy.[7] As an alternative, R. Fisher and his co-authors suggest a process of negotiating without mutual demands and concessions, based first of all on the analysis of mutual interest. "You begin with identification of the interests of each of the parties... – Ury elaborates on this thought in his subsequent book "Getting past No" W. Ury (Ury 1995, p. 26). Subsequently, by applying various techniques, alternative in relation to making demands, such as brainstorming or one-text procedure, he recommends searching for the possibilities to achieve these interests.

In the light of the position assumed by R. Fisher and his co-authors, also the third statements from among those presented by R.A. Rządca requires redefining, namely, that one claiming that "negotiators move between two points: the aim and the point of resistance". The situation described here often happens during negotiations. However, it is not a *sine qua non* condition of every discussion.

Let us examine the second statement, saying that "negotiators behave (not always) rationally (but they should)". If we assume, as R.A. Rządca claims, that negotiations are "a complex social process", they should not be assessed from the point of view of rationality. The successive changes, achieved on the society scale, described as a social process, are not subject to assessment from this perspective. It is therefore difficult to assess to what extent social processes are rational or irrational. Rationality is a notion inseparably related to the activity of an individual. While using a Weber's division of activities, each activity can be assessed as: rational, routine or affective (emotional). Although a large group of authors pay attention to questions of rationality in negotiations, and this issue occurs most strongly in those perspectives which refer directly to the decision making theory, the question of rationality, or rather of its absence in negotiations, is not a totally obvious issue. A bulk of studies devoted to negotiations, and in particular, models referring to game theory, takes an entirely opposite assumption. Namely, it assumes "superrationality" of negotiation participants.

A great part of statements making the paradigm of negotiations as formulated by R.A. Rządca are dedicated to the issue of the aim of negotiations. Besides the third statement that has been already mentioned, the issue of aim in negotiations has been referred to in the fourth statement, claiming that the aim of each of the parties is to maximise its share; the fifth, assuming that negotiations create a chance to reach common and different aims thanks to problem solving; and the sixth one, saying that behaviours of the parties are also modelled through immaterial variables and aims.

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[7] This is illustrated by the example of a conflict in the library, described on pages 75-76 of the book.

A few words about the fourth statement, saying that "the aim of each of the parties is to maximise its share". The aim is an indispensable element of each planned activity. It specifies the direction of activities that are undertaken and creates a basis for controlling their outcomes. Each of the complex tasks includes more than one aim from the point of which the efficiency of persons making the effort to complete tasks is assessed. The same situation emerges in negotiations, so the acceptance of the assumption that the aim of each of the parties is only to maximise its share constitutes a guideline for a specific assessment of negotiator's efficiency. If we accept this principle, the outcome of negotiations should be assessed from the perspective of maximisation of the party's share. According to this way of thinking, a negotiator will be fully effective when he reaches everything, while the other party reaches nothing. However, it is not the case, and the criteria of assessing activities of negotiators, considered from the perspective of assumed aims, are more complex. For example, in a situation when inhabitants of the housing estate object to creating a centre for the mentally ill in their neighbourhood, if they negotiate effectively, such a centre will not be created. Many authors recognized as authorities in the field of negotiations go beyond defining the aim of negotiations only in terms of maximising one's share. For example, Fisher and W. Ury, the authors quoted above, observe that the main aim of a negotiator is to direct the other party towards agreement through convincing it to participate in common problem solving. The aim of the party to negotiations is not, in their opinion, a maximisation of its share, but it is work with the opposite site with the aim to find an optimal solution for parties, for the conflict existing between them. "Negotiations are not a quarrel or a fight of two parties. The aim of the process is not obtaining by one of the parties a great concession from the other party – claims another famous author, T. Colosi. The issue of negotiation is to create a possibility of exchanging promises, thanks to which they will be able to reduce differences existing between them. Agreement does not consist in obtaining less or more, but rather in expressing the exchange of promises. Since the emphasis is on eliminating differences through the exchange of promises, the process is directed towards agreement." (Colosi 1993, pp. 295-296).

The sixth statement – "behaviours of the parties are also modelled by immaterial aims and variables", assumes a diversified character of negotiating issues, which include not only those questions that are of a material character, but also immaterial ones. It seems still necessary to comment on the issue which raises doubts of many authors. As results from the statement of R.A. Rządca, material and immaterial aims can be easily identified, since the interests of the parties of negotiations are specified and unchanging.

Acceptance of those assumptions raises serious doubts of some group of people interested in the subject of negotiations. M. Watkins, a professor of management at Harvard Business School, while giving lectures on the subject of negotiations, comments on this issue as follows: "Treating negotiations as interactions that engage several parties and clearly specified issues is a simplification, since not many real negotiations reflects such a transparent system. Equally unrealistic (and potentially dangerous) is the conviction revealed by many authors of how-to books that the interests and alternatives of negotiators remain unchanged during the course of the process" (Watkins 2005, p. 9). Equally important, or even more important, than specifying whether aims have a material or immaterial character, is to provide an answer to the question of whose goals are realized in negotiations. "Sometimes the management orders the negotiator what he should achieve at the negotiation table, but after a few negotiating sessions, the negotiator comes to the conclusion that those aims cannot be achieved" (Colosi 1993, p. 295).

Therefore, it is more important than analysis of measurable and immeasurable aims in negotiations to answer the question of whose aims are realized by negotiators – of their own or of their organizations. For understandable reasons, they are not always identical.

Basic dilemmas and unsolved problems of negotiation science

On a basis of a presented analysis of selected statements from the negotiation paradigm, it can be seen that it is difficult to find in contemporary negotiation science a set of statements the truth of which would be accepted by its all representatives. This means that this science does not have any paradigm. It can be observed in notional structures applied, revealing itself as a manner of defining negotiations, which are described as sequences of consecutive moves of fully rational actors (*e.g.* Nash 1950; Rubinstein 1982), decision making process (*e.g.* Pruitt 1981; Pruitt 1983), act of communication between the parties (*e.g.* Mulholland 1991; Putman and Roloff 1992), cognitive process related to a subjective perception of a situation and constraints of the rationality of negotiators (*e.g.* Bazerman and Carroll 1987; Bazerman and Neale 1997) learning process (*e.g.* Cross 1978). It manifests itself also in accepting different theoretical assumptions concerning the analysis of negotiation. Formal models, referring to game theory, are based on the assumption of the full rationality of the negotiators. The approach referring to the theory of decision making introduces elements of the negotiation process, with clear emphasis on the multi-stage character of discussion. The communication approach most strongly focuses on verbal and non-verbal forms of communication used by the parties; while in the perspective

treating negotiations as a learning process clearly focuses on the aspect of experience. The large diversity of theoretical approaches used in the analysis of negotiations, favouring on, one hand, their multifaceted explanation, causes still certain difficulties as regards defining, and then operationalizing variables for purposes of empirical research. Each of the approaches mentioned introduces its own original method of describing negotiations, indicates different parameters and applies different methodology to interpret the obtained results of investigations. The diversity of opinions and positions results in a situation in which a generally accepted model does not exist – a model, which would allow to integrate various proposals and in a manner free of controversies, would make it possible to examine the course of negotiations and factors conditioning it. The authors reach certain agreement only at the level of the simplest form of a descriptive model, which allows enumeration of variables that are important from the point of view of conducting negotiations. However, they are hedged with many preliminary assumptions and cannot be applied to all negotiating situations. More advanced dynamic models and functional models, representing the highest level of usefulness and used to specify relations between individual parts, discovering hidden dependencies, and illustrating the course of the negotiation process practically do not exist, while models referring to communication sciences are broadly and commonly used.

The science of negotiations is characterized by the lack of consensus as regards the extent to which negotiations should focus on talks, *i.e.* on what happens at the negotiating table, and to what extent their broader social context should be considered. If we take a closer look at many problems where a conflict is present (*e.g.* events related to the construction of the ring road through the Rospuda Valley, protests in national health service, including a famous protest of nurses, protests of teachers and other professional groups in relation to liquidation of the so-called bridging retirement, *etc.*), accepting the assumption that negotiations are a process taking place between individual parties and only at the negotiation table, has not much in common with reality. Yet, the majority of existing descriptive models of negotiations do not take into consideration the effect of the context and various conditions of the negotiation process. This assumption, having not much in common with reality, results, among others, from the fact that a significant part of research concerning negotiation is carried out with the use of a laboratory experiment, where, by necessity, conditions resulting from the context are omitted. "Negotiations between single parties are amazingly rare – claims M. Watkins. Even such simple negotiations as the purchase of a house usually means competing with other purchasers, discussions with borrowers, and sometimes cooperation with several sellers" (Watkins 2005,

p. 48). In addition, W. Ury, quoted above, presents an opinion in this matter, which clearly indicates the importance of knowing the broader context. "In negotiations, what you are doing after leaving the table is equally important as what you are doing at the table. I can recommend here building a strong, united coalition of those groups to whom your strong opponent poses a threat, to decrease the disproportion of forces. Let us not treat the opponent as a monolith – let us look for potential allies within groups of his opponents" (*Jak czerpać korzyści z konfliktów [How to benefit from conflicts]* 2007, p. 29). Although the literature devoted to negotiations includes the notion of BATNA, yet it does not describe the context, but it is used to identify the best alternative in relation to negotiation agreement. As a result, many critics of descriptive models of negotiation draw attention to the fact that actually, negotiations are not carried out only in a horizontal dimension between two parties sitting at negotiating table. Each student of negotiation who has had an opportunity to participate in negotiating simulations knows that internal arrangements within the team that is to conduct negotiations is equally important as talks between the parties. Most frequently, this team is not a monolith, and its members have conflicting aims and values. "Although most models assume that negotiations concern parties sitting at the negotiating table, relatively few actual negotiations are carried out in a horizontal dimension. Instead, statements are announced, banal statements are made and emotions are shown. If communication runs properly, two teams creatively use their time for convincing the other party. They explain their proposals and counter-proposals, compare data, exchange reproduced materials, present expert opinions... Most of those actions have a lower importance than an activity in the internal context" – claims T. Colisi (Colisi 1993, p. 294). As it can be seen, differences in analysing negotiations are visible not only between theoretical directions, but they also concern the scope of analysis of the negotiations themselves. It is a question whether to examine what happens between the parties at the negotiation table or to cover with the analysis a broader context of talks, including performance of a negotiation team, powers granted to it, etc.. As it can be seen, opinions in this matter are clearly divided.

Nowadays, due to the high complexity of solved problems, strategic partnerships and increasing role of interorganizational networks, the vast majority of negotiations are multilateral talks. "Although in reality most negotiations are carried out between more than two parties, it is more convenient to discuss about bilateral negotiations" – claims R. Fisher and his co-authors (Fisher et al. 2004, p. 37). A similar position is taken by M. Watkins, when he formulates the following view: "It is not difficult to find advice on conducting negotiations involving two parties and a few cases, but such simple nego-

tiations in a real world occur rarely" (Watkins 2005, p. 9). Nowadays, the vast majority of negotiations are multilateral talks. This results in that theoretical models assuming that only two parties participate in negotiations, cannot be applied to those cases. Bilateral negotiations are different from multilateral talks in that it is not possible to create coalitions within them, which are a typical kind of behaviour in negotiations where more than two parties participate, and which radically change rules of conducting negotiations. The analysis of multilateral negotiations is considerably complicated by the fact that alliances formed by the parties can be differently modelled as regards different issues (Colosi 1993).

Another element causing difficulties and being the subject of controversies in the analysis of negotiations is the mass usage of representatives (agents) to carry out talks. This is the reason why a fundamental notion of the party of talks, from the point of view of negotiation analysis, is not explicitly defined. "Even the category of a *party* to negotiation itself is difficult to be explicitly defined, taking into consideration agents, mediators, observers, *etc.*" – claim L. Crumb and A.I. Glendon (Crumb and Glendon 2003 after: Kozina 2007, p. 127). The involvement of representatives also makes the relations between the parties much more complex, and relations typical for simple negotiations between the parties is enhanced by relations occurring between the parties and the representatives, and between representatives directly participating in negotiations.

Beside basic controversies related to the scope and the method of describing negotiations, authors interested in the subject matter also differ in relation towards the issue of scientific cognition. This is mainly reflected in the way of applying empirical studies in the process of cognition. Research works devoted to negotiations are on one hand of an empirical character, they contain statistical results and only short analyses, or they are completely devoted of empiricism. A specific dilemma exists here between two opposite methods of understanding science – the empiric one, having its sources in methods of psychology and sociology, clearly referring to the empiricism of American sociology, and the critical one, referring to analyses close to those found in economy or philosophy, deprived of empiricism and typical for European research tradition. The experts in negotiating subject matter, inclined towards an empirical approach, also lack the general concordance as to which of the research methods applied are best for investigating negotiations. The method of observation is accused of influencing negotiators' behaviours, survey methods based on self-assessment of behaviour – of subjectivism of evaluations, and experimental methods, based on applying negotiating simulations are criticised for the artificiality of a negotiating situation. This is because the awards and punishments used in an

experimental situation do not correspond to those applied in a natural situation. Negotiation variables are defined and operationalized in different ways. Because of this, the results of research on negotiations are only partially comparable, and their interpretation can be carried out only in the context of accepted assumptions.

The variety of views concerning the issue of negotiations and their course is so complex that the unanimity of views of authors dealing with negotiation can be talked about only in relation to three issues. The first is a belief that negotiations are related to the phenomenon of conflict, and what follows it, the analysis of conflict brings about a range of important consequences helping to understand negotiations. The second is an assumption that in spite of the fact that conflict can also have an interpersonal character (can assume the form of an internal conflict)[8], negotiations are the process engaging at least two persons (parties of the conflict), being the form of social interaction. The third one is an already presented view that individual types of negotiations are connected by more similarities than differences, which creates a basis for dealing with negotiations as a separate subject of research. The other issues are the subject of discussion and of view clashing.

Summary

A discussion devoted to statements defined with the term of "negotiation paradigm" proved that they are not – as R.A. Rządca claims – "commonly applied truths, fulfilling a role of universal theses". A lively discussion is carried out among authors dealing with negotiation issues. The thesis proposed by R.A. Rządca, claiming that within the science of negotiations there exists a set of unconditionally accepted views; and moreover, those views are not subject to empirical verification,[9] seems, in the field of social scien-

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[8] The theory of conflict employs the division of conflict into intrapersonal, interpersonal, intergroup and intragroup ones. Intrapersonal conflict results from differences between the will and subconsciousness or it is a result of contradictory expectations of an individual within a social group (*e.g.* an academic worker experiences a conflict concerning how much time he should spend on the book he is preparing, and how much on duties related to students), or a conflict which emerges between individual roles (*e.g.* a student of extramural studies faces a dilemma whether he should devote more of his time to studies or absorbing professional work).

[9] According to R.A. Rządca, theses of the paradigm are not subject to empirical verification. As he writes: "Those statement have a character of totally basic ones, not empirically verified certainties, and this is just what induces us to call the a paradigm of negotiations". (Rządca 2003, p. 33). The position presented is contradictory to the view of many authors expressing their opinion on the subject of paradigm, who closely relate the

ces, an opinion that is extremely difficult to prove. A characteristic feature of these sciences is constant clashing of various positions. The acceptance of the assumption that only one proper way of thinking exists is contrary to their nature and can lead to attributing them such features that will make ideology out of science. This regularity fully concerns management science, within the borders of which the issue of negotiations is located most frequently, where significant differences in opinions are inseparable features. Many concepts presented on their grounds do not have hard forms or are absolutely indisputable, and many of their even basic categories, notions and paradigms have a "soft" character. This results not only from the nature of social sciences themselves, among which the management science is ranked, but it is also related to the young age of the management science (Sudoł 2007).

Abstract

To date, the interest in negotiations has concerned, first of all, a sphere of practical activity. The notion of "negotiations" also means a science. This article attempts to define the stage of its development. With this aim in view, Kuhn's concept of a paradigm has been referred to, which is regarded as a central category used in the evaluation of the development of science. The article involves a critical analysis of previous attempts to define a paradigm of negotiations, proving that science of negotiations is still in its pre-paradigmatic phase. It discusses dilemmas and challenges which it faces at the current stage of its development.

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fact of its creation with results of empirical research. According to T. Goban-Klas "a paradigm is a specific theoretical pattern, based on the acceptance of certain behaviour, which is a result of previous empirical studies" (Goban-Klas 1999, p. 95). Without going further into this aspect of a paradigm, it seems that Goban-Klas is closer to the truth, if only for the fact that empirical verification of theses proposed is an inseparable feature of each science (Nagel 1970).

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TRANSGENIC PLANTS – GENETICALLY MODIFIED FOOD

Key words: transgenic plants, genetically modified food, crop acreage

Introduction

The turn of the XX and XXI centuries is the time of the greatest accomplishments in the field of molecular bases of life as well as dynamic development of genetic engineering and biotechnology. Biotechnology has been commercially utilised, among others, in medicine and environmental protection. Methods of genetic engineering are gaining particular significance in food production and processing (agrobiotechnology), that in the near future are likely to predominate the world food market (Tomkiewicz and Zając 2007).

Since commercialization of the first cultivars of genetically-modified plants in 2006, their global acreage is still increasing. According to recent data, thousands of genetically-modified plant lines have been tested, out of which cultivars of, among others, corn, tomato, rice, soy, strawberry, or grapevine were introduced to the cultivation practice. As a result, most of corn, cotton and soy crops in the USA are transgenic. Nowadays, we have reached the crucial stage for the future utilization of genetically modified plants (GMP) (Zimnoch-Guzowska et al. 2004). A worldwide social discussion is being held about direct usage of that new generation of plants in the food production. Consumers are anxious mainly about the health aspects of the intake of genetically modified food, for example: soy and corn with bacterial genes, tomato with fish genes, potato with jellyfish genes, rice or carps with human genes, or lettuce with rat genes, as their long-standing effects on human body have not been explicitly recognized yet.

The aim of the study was to present the fundamental issues concerning genetically modified plants and food.

Transgenic organisms, transgenic food

According to the Art. 3 of the Act of the 22 June 2001 on *Genetically Modified Organisms* (Official Journal of 2001, No. 76, Item 811, with later amendments): **Genetically Modified Organisms (GMO)** or **transgenic organisms** are organisms other than humans, whose genetic material has been altered in a way that does not occur naturally by crossing or natural recombination.

Modifications organisms are subject to may be divided into three groups:
   a) activity of genes naturally present in an organism is altered,
   b) additional copies of genes are introduced into the same organism which they originated from,
   c) introduced gene originates from other organism.

The field of science dealing with modifications of organisms is **genetic engineering**. It enables the isolation and replication of any gene from any organism and its insertion into a genome of a modified organism using various methods. The transferred gene is called **transgene** – and that is from where the term **transgenic organism** was derived. After being transferred – the **transgene** is permanently included into the genome of a host organism and since then is present in all descendant organisms (www.biotechnolog. pl/gmo-3.htm).

Genetically modified food or **transgenic food** is food derived from genetically modified plants or animals. Those products consist of genetically modified organisms (GMO) or their parts (Azevedo and Araujo 2003). Transgenic food, in comparison to the traditional food, may possess new features, such as: changed functionality, nutritional value, health-promoting, technological or sensory characteristics (Grajek 2006, Kolodinsky *et al.* 2004).

The achievements of genetic engineering affect, among other things, the improvement of food flavor and create organisms which support therapy of some diseases. The aim of genetic scientific research is to create plant organisms resistant to weather conditions, pests, herbicides and producing a high crop yield (Tab. 1). Those products are supposed to reduce cultivation costs and eliminate the global starvation problem. However, GMO products have sparked significant controversy. The most serious problem is connected with the fact that it is still difficult to predict how the intake of those foods may influence a human organism (Kosicka-Gębska and Gębski 2008).

Genetic modifications which provoke the greatest controversy are introduction of genes originating from other species that give a desirable trait to the modified organism, which does not occur naturally. The effects of agrobiotechnological methods of cultivation are more and more noticeable.

Their products are present on global markets. For example, transgenic tomato resistant to diseases has been grown in USA since 1995. Since 1997 transgenic potato resistant to viral infections has been produced and transgenic soy, rapeseed and cotton have been grown since 1998. Effects of genetic improvement of many other plants are known as well. In this way, apple tree resistant to insects; maize, cabbage and wheat resistant to herbicides were obtained. Transgenic coffee bush produce more beans which yield improved taste and enriched aroma to coffee made of them. Bananas resistant to fast rotting and vegetables with increased vitamins content are known as well. These are only a few examples of plants, whose functional traits mentioned, obtained by means of biotechnology, are replicated in next generations, thus becoming permanent traits of an organism and predisposing it for commercial cultivation. An important research direction of **agrobiotechnology** is also introduction of transgenic plants to the production of oral vaccines, for instance against AIDS, viral hepatitis B and rabies. Studies on the utilization of those plants as renewable resources in biorefineries are also undertaken (www.futurum.biz.pl/futurum_art/pl_art_1.htm).

Tab. 1. Selected transgenic plants.

Plant	Effect of genetic modification
Strawberry	increased sweetness, delayed ripening, freeze resistance
Apple tree	resistance to insects
Bananas	resistance to viruses and fungi, delayed ripening
Grapevines	seedless varieties
Celery	increased tenderness
Broccoli	delayed ripening
Chicory	increased sugars content
Cabbage	resistance to pests, smaller head size
Pumpkin	resistance to fungi and insects
Tomato	higher content of dry matter, delayed ripening and softening, better taste, more intensive colour, thinner peel, resistance to viruses and infections
Soy	resistance to herbicides, reduced palmitic acid content of oil
Rapeseed	increased laurylic acid content, reduced content of unsaturated fatty acids of oil
Potato	increased starch content, cyclodextrins production, resistance to darkening after injury, amylopectin starch, low glycoalkaloids content, low reducing sugars content, resistance to viruses, resistance to potato beetle
Wheat	resistance to herbicides, increased gluten content
Coffee	better aroma, higher yield, reduced caffeine content
Sunflower seeds	reduced unsaturated fatty acids content

Source: www.laboratorium.elamed.pl/strona-numer-9-2007-3835.html.

EU and Polish government policy towards GMO food

According to Regulation (EC) No 1829/2003 of the European Parliament and of the Council, if food material contains more than 0.9% of GMO it should be labelled as "genetically modified food". The label on the package: "genetically modified food" means food which contains, consist of or is produced from GMO. „Produced from GMO" means products derived, in whole or in part, from GMO. The labelling should include objective information that food contain, consist of or is produced from GMO. In addition, the labelling should give information about any characteristic or property which renders modified food different from its conventional counterpart with respect to composition, nutritional value or nutritional effects, health implications as well as any characteristic or property which gives rise to ethical or religious concerns (Zimny 2007). Due to Polish aspiration to be GMO free country, the Polish government allows only the import of GMO food from outside the European Union and from Member States of the EU **on condition that it is clearly labelled and not further processed in Poland** (O. J. 2005, No 31, item 265 uniform test). Tab. 2 presents the list of GMO plants approved for market turnover by the EU, as well as notified and pending.

The State Sanitary Inspector is responsible for the introduction of GMO to the food market in Poland, according to Regulation No 1829/2003 of the European Parliament and the Legal Act of 11 May 2001 on health conditions of food and nutrition (O. J. 2005, No 31, item 265 uniform text). The Polish government supports only works on contained usage of GMO according to regulations of law (O. J. 2002, No 107, item 944). According to the Legal Act of 23 June 2003 on seed material (O. J. 2003, No. 137, item 1299) and the Directive 2002/53/EC, the Minister of Agriculture is responsible for registration of crop varieties, including the genetically modified plants. At the EU level, there are no binding legal regulations regarding the cultivation of genetically modified plant growing and coexistence of three systems of agriculture – traditional, organic and agriculture that use transgenic plant. Only fragmentary regulations exist in the form of instructions of the European Commission.

Tab. 2. GMO plants approved for market turnover by the EU (APP), notified (NTF) and pending (PED).

Organism	New trait	Food application	Applicant	Legal status
Corn	tolerance to insects and herbicides	food products and their ingredients	Ciba-Geigy, Novartis Seeds	APP
Soy	tolerance to herbicides	food products and their ingredients	Monsanto	APP
Canola	tolerance to herbicides	processed oil	AgrEvo UK, Plant Genetic Systems, Monsanto, Hoechst Schering	NTF
Corn	resistance to insects	food ingredients	Monsanto, Pioneer Overseas Corp	NTF
Corn	resistance to herbicides	food ingredients	AgrEvo	NTF
Tomato	delayed ripening	tomato pulps	Zeneca	PED
chicory (red – radicchio and green)	tolerance to herbicides and male sterility	vegetable	Bejo-Zaden	PED
Soy	high oleic acid content	oil	E I DuPont Nemours	PED
Corn	tolerance to herbicides	food products and their ingredients	Monsanto	PED
Soy	tolerance to herbicides	seeds	Plant Genetic Systems	PED
Corn	tolerance to herbicides and insects	vegetable, frozen sweet corn and powdered corn, food ingredients	Novartis Seeds, Monsanto, Pioneer Overseas Corp	PED
Sugar beet	tolerance to herbicides	sugar, food ingredients of pulp	Monsanto & Novartis Seeds	PED
Corn	tolerance to herbicides and insects	vegetable, frozen sweet corn and powdered corn, food ingredients	Pioneer Overseas Corp, Mycogen Seeds	PED
Mangold	tolerance to herbicides	animal feed	DLF-Trifolium, Monsanto, Danisco	PED
Potato	changed starch composition	starch and ingredients	Amylogene	PED
Cotton	tolerance to herbicides or insects	usage like other cotton	Monsanto	PED

Source: www.ift.org/govtrelations/biotech.

Selected Polish legal acts and regulations referring to GMO

1. The Act of 22 June 2001 on Genetically Modified Organisms (Official Journal of 2001, No. 76, Item 811, as amended).
2. The Regulation of the Minister of Environment of 8 July 2002 setting out how risk assessment should be conducted. This includes the assessment of risks to human health and the environment stemming from activities involving the contained use of GMOs, the deliberate release of GMOs into the environment, the placing of GMO products on the market, and the requirements which should be satisfied by the documentation containing the results of such an assessment (O. J., No. 107, item 944).
3. The Regulation of the Minister of Environment of 21 February 2002 on the detailed rules of procedure for the Commission on genetically modified organisms (O. J. 2002, No. 19, item 196).
4. The Regulation of the Minister of Environment of 6 June 2002 laying down the formats of application forms for consent and authorisation of activities involving GMOs (O. J., No. 87, item 797).
5. The Regulation of the Minister of Finance of 19 April 2002 laying down the list of Customs Offices suitable to import and export GMO products GMO (O. J., No. 43, item 406, as amended).

Transgenic crops acreage

In 2008, in the Member States of the EU, the acreage of genetically modified crops has decreased by 2% (Tab. 3). This decrease was mainly due to a ban on GMO crop implemented in France. In 2007, France was the second largest transgenic plants producer in Europe. In 2008, transgenic crops were planted in seven EU countries, among which Spain had the largest acreage. Over the last year, crop acreage increased in Poland, Czech Republic and Slovak Republic (http://rolnicy.com/uprawa-roslin).

European countries constrain wider introduction of genetically modified plants into agricultural practice, whereas on other continents the production of those plants is raising dynamically. In 2008, the largest producers of transgenic plants were: USA, Canada, India, and China (Fig. 1).

From the report of the International Service for the Acquisition of Agri-biotech Applications (ISAAA) titled "Global Status of Commercialized Biotech/GM crops 2008", it can be concluded that 13.3 millions of farmers from 25 countries planted 125 million hectares to genetically modified plants in 2008. Egypt and Burkina Faso initiated the most significant transgenic plant crops in Africa. In 2008, in Egypt 700 hectares were seeded with genetically

modified corn, and in Burkina Faso 8500 hectares were sown with cotton Bt. Those countries joined the Republic of South Africa, which since 1998 takes profits from the cultivation of such transgenic crops as: cotton, maize and soy.

Tab. 3. Acreage of transgenic crops in the European Union (ha) in the years 2007-2008.

Country	2007	2008
Spain	75148	79269
France	21147	0
Czech Republic	5000	8380
Portugal	4500	4851
Germany	2285	3173
Slovak Republic	900	1900
Romania	350	7146
Poland	320	3000

Source: Ministry of Agriculture / Agra Europe/ *http://rolnicy.com/uprawa-roslin).*
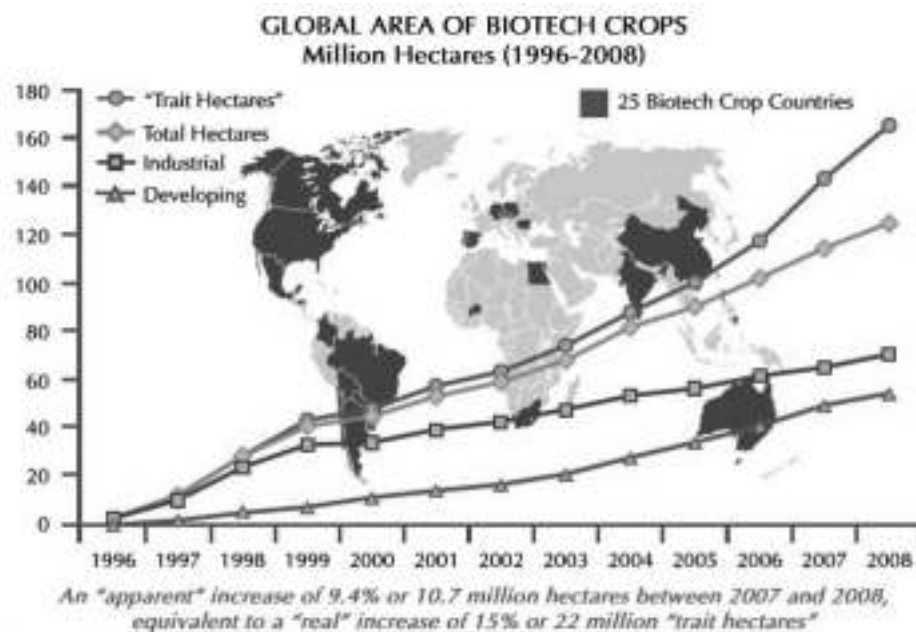
Fig. 1. Global acreage of GMO (mln ha), in the years 1996-2008.
Source: James Clive, 2008.

Summary

GMO food is food with enriched nutritional value and improved functionality (Zimny 2007). Introduction to the market and popularization of genetically modified food is an issue which has sparked a great controversy. On the one hand, the cultivation of transgenic plants may bring many benefits, *e.g.* increase in crop yield and quality, simplified weed, pests and disease control, however, there are fears that it may pose some risks (Praczyk 2002).

Results of a questionnaire survey conducted by Tomkiewicz and Zając (2007) confirmed far-reaching caution of consumers towards transgenic food, both because of its potentially detrimental effect on environment as well as detrimental health effects of GMO food consumption, especially by children (60% of the respondents). According to those authors, philosophical and religious beliefs can have a significant impact on consumer's attitude to genetically modified products (Zając and Tomkiewicz 2007). On the other hand, Kosicka-Gębska and Gębski reported that respondents' knowledge on GMO food is at a relatively low level. More than 60% of the respondents heard about that type of food, but were not able to explain the heart of the matter (Kosicka-Gębska and Gębski 2008).

The greatest concerns are, however, raised by the detrimental effect of GMO products on human organism. Proteins, that are products of transgenes expression, are believed to be able to modify the course of cell metabolism and lead to the formation of harmful compounds, inducing a number of diseases, allergies *etc*. Those concerns are well-founded, because cases of rash have been reported after consumption of GMO products. However, the truth is that many traditional food products also do cause allergies. In turn, the GMO food is thoroughly analysed before it is approved for sale. No detrimental effects of genetically modified food on human organism have bee noted until now. However, it has never been proved explicitly that it is completely harmless, either. Effects of long-standing consumption of GMO are still unknown. Thus, discussion over this subject will surely be carrying on (www.biotechnolog.pl/gmo-8.htm).

Conclusions

1. The global transgenic plant acreage is still increasing, whereas the EU policy on the idea of GMO is very strict.
2. Doubts over utilisation of GMO in agriculture and food production result, among others, from a lack of information about the essence of new technologies and their relationships with the previously applied cultivation techniques.

3. Cooperation of experts from various fields and continuous scientific research on products of genetic engineering are necessary.
4. The results indicating no negative effect of GMO products on human health would contribute to their wider acceptance among communities.

Abstract

The analysis of changes undergoing in plant production and food industry enables concluding that food production in the XXIst century will additionally be based on genetically modified organisms. The article reports on general ideas concerning genetically modified organisms, selected transgenic plants and crop acreage planted to genetically modified plants in Poland and world wide. The government policy on transgenic food is analysed as well.

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Krystyna Zarzecka

POTATO AS A GLOBAL PLANT – NUTRITIONAL, DIETARY AND MEDICINAL VALUES

Potato – plant of Poland, Europe and the whole Glob

Potato (*Solanum tuberosum* L.) belongs to the Solanaceae family. It is one of the most important edible plants, universally planted in moderate climate, more rarely in the warm one. An edible part of potato is a tuber. It is known as *potato* – in English, *papa* – in Spanish, *kartofiel* – in Russian, *kartoffel* – in German, *pommes de terre* – in French (Birecki 1958, Ceglarek and Zarzecka 2003).

When nomenclature of potato in our country is concerned, probably any other crop plant in Poland had not have so many literary, dialectic, regional or folk names in the past and nowadays. Among them, two groups should be mentioned: 1/ regional, folk general names – 21, 2/ regional, folk names of varieties of this plant – 130. In the first group, the most common are: *bandura* – borderland dialect from Lviv and around, *kartofel, kartofla* – germ. – mainly Silesian language, but also all around the country, *pyra* – Poznań dialect, *grula, krąpel* – highland dialect (Eastern Podhale), *bulwa, gulba* – Kashubian language, *kompera* – Lemko language, *perka, pyrka, pyraki, perzaki* – previous names derived from the country name – Peru, from where potato originates, *rzepa* from Orawa – Western Podhale, *bałabaje, bałabony* – most common in Eastern Poland. The second group of numerous potato names contains forms originating from foreign and native proper names or from the appearance of tuber, especially shape, size or skin and flesh colour. The most common are: *amerykany, moskale, olendry, galicyjki, krakusy* – names given from origin*, jakubki, janki, świętojanki* – were ripening early and were called by first names, *bałaburki, buraszki, burki* – originating from gray colour of tuber, *dudnice, gałuchy, gały* – because of tuber shape, *bielasy, bieluchy, rychlaki* – from flesh colour, and many others with unclear origin (Tomczak 2001, Zalewski 2008).

Worthy of notice is the fact that potato has its memorials. In Poland there are two monuments of potato, in Besiekierz near to Koszalin and in Poznań,

at Łęgi Dębińskie. On the 25 May 2008, the monument of potato was unveiled in a Slovenian town Šenčur near to Kranj. Monuments of potatoes are also located in a Croatian town Ananova and at church wall in an Austrian town Prinzendorf. A large monument of this plant is also at the Potato Museum in Idaho, USA.

A bit of potato history

Potato originates from South America, area of Peru, Chile, Bolivia and Ecuador today. The tracks of potato intentional cultivation date back to 4,000 BC. The potato was introduced to Europe in the middle of the XVIth century in two alternative ways. The first one was the Spanish trace, when about 1565 the potato was brought from Peru by Spanish caravels. The second one was the English trace – leading from Chile to England, where potato reached about 1585. Blandish tubers did not suit to contemporary gourmets' taste at once. First nation who appreciated them were the Irish. At the very beginning potato was an unusual plant specimen and was grown mainly in botanical gardens (Ratuszniak 1992). Then, it was regarded as a healing, ornamental and garden plant. Healing values of potato were discovered by monks who were cultivating potatoes in monastic gardens in Spain, Belgium, and then near Padua, Vienna and Wroclaw. It was also an exotic ornamental plant in times when gerberas and roses were unknown. The king of France Louis XVI appeared with a flower of potato pinned to his tailcoat during royal court balls, whereas the Queen Maria Antoinette was still sticking a potato flower into her hair at the end of the XVIIIth century. At that time a bouquet of potato flowers given to a beloved woman had the same symbolic meaning as seven red roses later. This plant served aesthetic functions because it was cultivated for its flowers (Leszczyński 2007).

First contacts of Europeans with potato as an edible plant were not successful. Green fruits, leaves and stalks were tasted. Only after 200 years culinary values of underground tubers were appreciated, at the same time way to introduce them to cultivation was difficult. Bitterish taste of tubers, due to a significant content of glycoalkaloid – solanine, stood in the way of their popularization. Moreover, the fact that potato was not mentioned in the Bible was an argument against its cultivation. Initially potato was a delicacy served only at royal and magnate courts, often rationed. In the XVIIIth century, countries applied various methods of popularization of potato cultivation amongst farmers in order to prevent famine. King of Prussia Frederick II appreciated the values of this plant, thus he used army to enforce peasants to grow potatoes. In Russia, Tsar Peter I and then Nicholas I, who was even more resolute, popularised potato cultivation by exiling the

insubordinates to Siberia. It enhanced the willingness to grow potatoes, and today "kartoszki" are the main component of a diet of most Russians. Also in France people's distrust towards potato cultivation was similar, but the methods of overcoming it were different. Louis XVI and his adviser Parmentier, a pharmacist (inventor of new varieties), ordered to plant potatoes in royal demesnes and other gardens and to protect crops by army. Guards were supposed not to be very eager in their duties. Seeing the crops being watched by the guards, peasants were taking them for something valuable. At nights they were stealing potatoes, ate them and then planted them on their land. In this way, in the XVIIIth century potato cultivation gradually became common in the entire Europe. In some countries, expansion of this plant was very rapid, among others in Ireland potato became the main source of food. Great potato blight (1844-1851) led to famine and death of about one million of Irishmen and then to the mass emigration of that nation to the USA (Birecki 1958, Karczmarczyk 1999, Leszczyński 2007).

The potato was brought to Poland by King Jan III Sobieski in 1683, when he was coming back from the Battle of Vienna. Potatoes were a gift for queen Maria Casimiere and then became a specimen of royal botanical gardens. On a larger scale potato cultivation was started no sooner than at the end of the XVIIIth century. Over time in Poland and across Europe potato was subject to a metamorphosis from a luxury vegetable of magnates to staple food of poor people. It was also widely used to obtain starch, as distilling material as well as feedstuff (Chotkowski 1990, Leszczyński 1994a, 2007). Therefore the history of potato was full of ups and downs. For many years potato has had a bad reputation and was called the "devil's apple". Because being grown underground, potato tubers were believed to be poisonous. It resulted probably from the fact that our progenitors tasted green berries of potato which contained poisonous solanine. Other time, the potato rescued millions of people from threat of starvation. It had been a dish of the greatest kings and poor peasants, and thus it has been referred to as: "delicacy of kings and paupers" (Hobhouse 2001, Ratuszniak 1992, Zarzecka and Baranowska 2003).

2008 – International Year of the Potato

The General Assembly of the United Nations approved the resolution A/RES/60/191 on 22 December 2005, laying down year 2008 as the International Year of the Potato. But why was staple potato chosen? Initiative came from the government of Peru, which emphasised economical importance of the potato in providing food security and alleviating poverty worldwide.

The aim of this decision was:

- to emphasise the important role of the potato in providing world food security,
- to raise awareness of the importance of the potato and its cultivation,
- to increase the yield of potato production, which is grown also on less fertile soil,
- to popularize increasing world consumption of potato as a nutritionally valuable and healthy food product,
- to promote knowledge and information exchange and permanent international cooperation between all organizations operating on the potato market,
- to achieve a higher level of applying a balanced method to manage natural resources.

The International Year of the Potato was the reason for many international and national conferences and symposia held in the USA, Egypt, Kenya, Brazil, Pakistan, Austria, Spain, India, New Zealand, Poland, among others.

The strategy of celebration of the International Year of the Potato included exchange of information, conducting researches on potato, as well as aid in constructing programs and projects supporting the sector of potato production. In our country, many conferences took place as well: *i.e.* 5th Scientific Conference "Food and industrial potato and its processing" titled "Potato processing as a factor of growth and streamlining of its production" on 12-15 May 2008 in Szklarska Poręba, and "Potato in scientific researches and practice" on 5 November 2008 in Cracow (Leszczyński 2008, International Year of the Potato http: //www.unic.un.org.pl/rok_ziemniaka/index.php).

Potato – an important plant worldwide

At the turn of the XIXth and XXth centuries potato spread over all continents. In 2007 its annual production amounted to 325 million tons (Tab. 1), and increased over the 10 last years by 4.5% (Leszczyński 2008). Over the years 1991-2007, a tendency was observed for decreasing crop of potato in developed countries and for increasing potato crops in developing countries. Global potato consumption and specific for selected European countries were depicted in Tab. 2 and 3, whereas crop yield was shown in Tab. 4 (International Year of the Potato http: //www.potato2008.org/, Rynek ziemniaka 2008).

Tab. 1. World potato production in 2007.

Continent	Crop million tons	Yield tons/hectare
Asia/Oceania	137	15.7
Europe	130	17.4
North America	25	41.2
Africa	17	10.8
South America	16	16.3
World	**325**	**16.8**

Tab. 2. Potato consumption in kg/per capita/year in 2005.

Continent	Consumption kg/per capita/year
Asia/Oceania	23.9
Europe	87.8
North America	60.0
Africa	13.9
South America	20.7
World	**31.3**

Tab. 3. Potato consumption in selected countries in 2005.

Country	Consumption kg/per capita/year
Belarus	181
Ukraine	136
Russia	131
Poland (2007)	120
Lithuania	116
Latvia	114
United Kingdom	102
USA	54
Europe	**96**
World	**31**

Poland is one of the world greatest potato producers. Greater crop acreage of potato is only in China, Russia, Ukraine and India, whereas in terms of production Poland is at the seventh place worldwide and is holding a leading position in consumption per capita (Leszczyński 2008).

Tab. 4. Potato yield in selected countries in 2007.

Country	Yield tonnes/hectare
New Zealand	50.2
Netherlands	44.7
USA	44.6
Germany, Belgium	42.3
Japan	31.9
Egypt	24.8
Morocco	24.2
Poland	**20.7**
Pakistan	19.9
China	14.4
Ukraine	13.1
Russia	12.9
Peru	12.6
Bolivia	5.5
Nigeria	3.1
Europe	**17.4**
World	**16.8**

Potato is a plant of a great economical importance, mainly due to versatile utilisation of tubers. Its crops are intended for: direct human consumption, food processing (fried, frozen, dried, sterilised, semi-finished products), industrial processing (starch and distilling industry), feedstuff, and seeds (Lisińska 2004, Prośba-Białczyk 2008, Zarzecka 2006, Zgórska 2005). The usage of tubers for consumption has the greatest significance worldwide (app. 60%), in the Member States of the European Union (51%), and also in Poland (more than 34%) (Zarzecka and Wyszyński 2006, Rynek ziemniaka 2008). Crop yield and quality depend on properties of cultivars (Lisińska 2006, Roztropowicz 1989, Zimnoch-Guzowska and Flis 2006), agrotechnical factors (Gruczek 2004, Krzysztofik 2008, Leszczyński 2002, Sawicka 2000, Zarzecka 2006) as well as weather conditions during plant vegetation (Leszczyński 1994b, Mazurczyk and Lis 2001). Tab. 5 depicts the effect of means of weed control using herbicides on potato tubers crop. Careful mechanical and chemical control eliminating weeds may increase the yield by 15-30% (Gruczek 2004, Zarzecka 2006)

Tab. 5. Potato tubers crop yield – average from years 2002-2004
(own studies and calculations).

Means of weed control	Tuber crop yield t·ha^{-1}	Increase in crop yield in comparison to object 1	
		t·ha^{-1}	%
1. Control object – mechanical cultivation	28.44 a	-	-
2. Plateen 41,5 WG	30.89 b	2.45	8.6
3. Plateen 41,5 WG + Fusilade Forte 150 EC	32.71 bc	4.27	15.0
4. Plateen 41,5 WG + Fusilade Forte 150 EC + adjuvant Atpolan 80 EC	34.00 c	5.56	19.5
Average	**31.51**	**4.09**	**14.4**

Values marked with the same letters are not significantly different at the level p=0.05

Potato cultivars

In 2008 in Poland there were registered 138 potato cultivars, including 80 cultivars grown in our country and 58 abroad. Out of the cultivars listed in the State Register, 104 were edible and 34 were starch cultivars (Lista odmian roślin rolniczych 2008). It should be emphasised that Polish cultivars equal in many respects the foreign ones and may compete with them. Moreover every region of Poland has its own name for the grey tuber (Nowacki 2004).

Tab. 6. Potato cultivars.

Cultivars	35 years ago	Nowadays
Number of cultivars in the register	35	138
Number of foreign cultivars	2	58
Edible cultivars	15	104
High starch cultivars	13	34
Multifunctional cultivars	7	-

Chemical composition and nutritional value

The potato is the world's fourth most imported food crop, following maize, wheat and rice. It should become one of the main nutritional components, since it is a rich source of energy and valuable food. Experts of the Food and Agriculture Organisation of the United Nations called people's attention to nutritional and wholesome properties of potato, for its proteins are very valuable and one middle-sized potato covers half the daily requirement for vitamin C and one-fifth of the requirement for potassium (Ceglarek and Zarzecka 2003, Leszczyński 1994a, 2000, Zarzecka and Gugała 2008).

Tab. 7. Average nutritional value per 100 g of fresh potato tuber.

Components	
Energy: 87 kcal	Zinc 0.1 mg
Protein: 2 g	Copper 0.08 mg
Carbohydrate: 19g	Selenium 1μg
Fat: 0.1g	Nickel
Dietary fibre: 3.1g	Cobalt
Potassium 450 mg	Boron
Phosphorus 60 mg	Vitamin C 14 mg
Magnesium 22 mg	Vitamin B1 0.12 mg
Calcium 5 mg	Vitamin B2 0.04 mg
Sodium 2 mg	Vitamin B6 0..3 mg
Iron 0.5 mg	Nicotinic acid (niacin) 1.2 mg
	Folic acid 23 μg

Potato – a vegetable of the XXIst century – nutritional and dietetic values

Potatoes almost passed into oblivion in many houses. Quite a lot of people have regarded them as an outdated and ordinary vegetable. Rice, grits and pasta took over. Today they are returning on our tables with a great style, because:

– they are easily digestible and low calorific. The calorific value of potato is low and is comparable with the calorific value of apple or milk and is 4-5 times lower than that of wheat roll, hence the opinion that potatoes are fattening is completely unfounded unless we are pouring thick sauce or fat on them,

– protein of tubers has a high biological value – comparable to that of soy proteins or only slightly lower than that of egg proteins. It is very rich in exogenous amino acids, which are not synthesised by human organism,

– their dietary fibre is valuable as it improves digestion and development of proper gut microflora,

– potato tuber contains the entire Mendeleev's table – including both macro- and microelements. Especially valuable are: calcium, magnesium – they have a base-forming activity, their presence in the diet neutralises the acidifying activity of meat and cereals,

– potatoes are a rich reservoir of vitamins B1, B2, B6, PP, folic acid, nicotinic acid and especially valuable vitamin C. The intake of 200-300g of potatoes covers about 60% of organism requirement for this

vitamin (Karczmarczyk 1999, Leszczyński 2000, 2008, Lisińska 2006, Zarzecka 2006).

Some of vitamin C benefits to our organism:
– improves immunity of organism,
– has antibacterial properties,
– inhibits the formation of carcinogenic substances in the stomach,
– eases wounds healing,
– inhibits bruises,
– participates in red blood cells formation.

Culinary value of tubers is also of great significance:
– neutral odour and good flavour, they harmonise well with other products,
– their flouriness and viscosity classify them to different dishes ,
– flesh has various colours – white, creamy to yellow (the latter one contains carotenoids – antioxidant compounds).
– It is worth knowing that potatoes:
– the less processed they are, the healthier and more valuable they remain,
– just after harvesting they contain the largest amount of vitamin C – almost as much as lemon,
– when cooked in large volume of water, they lose a number of vitamins, especially vit., C,
– what is more, loss of vitamins is larger when the area exposed to temperature is larger, that is way we do not cut potatoes into small pieces before cooking,
– tubers should be peeled as thinly as possible, because plenty of nutritional compounds are contained under the skin (Zawistowska 1983, Sikora *et al.* 2008).

It is worth reminding that that centuries ago the father of contemporary medicine – Hippocrates wrote, that "Let food be medicine". Today, when it is known that most of diseases are induced by improper nutrition, prophetic words of the great physician may be assessed (Wiąckowski 2001). Moreover, according to dieticians "potato is one of the best designed products by nature, it grows in perfect package and well stored remains fresh for a very long time" (Zawistowska 1983).

Healing power of tuber

The intake of potatoes is recommended for people suffering from hyperacidity, because they possess base-forming properties. Potato juice relieves stomach pains. In former medicine, many diseases were cured by potatoes. For example: burned skin was treated with a compress of raw grated potatoes, mist of boiling potatoes was inhaled to cure respiratory tract infections, raw potato juice was used to cure gastric and duodenal ulcers. Vitamins contained in tubers have been shown to destroy fungi and bacteria, prevent dilation of blood vessels. Furthermore, potatoes improve oxygen supply to brain, lower blood pressure, support the curing of allergies. A diet rich in potato starch lowers the risk of colon cancer and decreases the number of white blood cells. In one word: the more potatoes, the less diseases (Kaszak 1991, Karczmarczyk 1999, Nowiński 1970).

Potatoes – it is a great chapter of the Polish cuisine

Potatoes are consumed mainly unprocessed in Poland, boiled in water or steamed. In western countries, about 30-50% of potatoes are consumed in processed form, just to compare: in our country about 12% (Rynek ziemniaka 2008). The most frequently prepared dishes are: potatoes from water, potatoes with butter and dill, puree, potato pancakes, different types of potato dumplings, cutlets and noodles, potato soup, potato salads, various potato pies, French fries, chips, and fried potatoes (Zawistowska 1983). In terms of the number of recipes for potato dishes Poland is holding a leading position worldwide.

A national organisation „Association of Polish Potato" has been established in 2002 and has been integrating potato trade society. Furthermore, annual potato feasts are organised in almost every district *e.g.*: Dni Pyrlandii (Days of the Potato-land), Święto Pieczonego Ziemniaka (the Feast of Roasted Potato), Święto Ziemniaka (the Feast of Potato), and other regional feasts, *e.g.* Dokopiny, Pokopki. Potato has also been a subject to artists and writers, the latter being, among others, Adam Mickiewicz, Eliza Orzeszkowa, and Henryk Sienkiewicz. In turn, Julian Ursyn Niemcewicz in his „Podróżach historycznych po ziemiach polskich" („Historical travels around Polish potatoes") wrote: „It should be confessed that, next to baptism, potatoes are the greatest kindness lent by the Heavens. We should owe America more gratitude for them than for ores of gold and silver, for fatal greed and tools".

Summary

Potato is a plant of high economical importance due to the extensive utilization of tubers. It is mainly an edible plant with high nutritional, dietetic and wholesome values. Moreover, tubers are valuable materials for food and industrial processing as well as good feedstuff.

Potato cultivation plays an important role in agricultural production and has a key position in crop rotation, since it favourably influences soil fertility or yield of subsequent plants.

Abstract

The manuscript addressed an overview of potato nomenclature – from international names of the species, through national, folk, regional to cultivar names. It additionally outlined the history of potato incorporation to the European continent as well as its cultivation, production crop yield and consumption at a global, European and national level. Issues concerning the economic importance of potato, its chemical composition, nutritional, consumption, dietetic and health-promoting values were discussed as well.

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SEASON'S INFLUENCE ON THE PROPERTIES
OF MALE DOMESTIC PIG SEMEN

Key words: pig boar, ejaculate, season

Introduction

Proper reproduction is fundamental for the profitability of slaughter pig production, the effectiveness of which depends mainly on the appropriate use of pig sows and pig boars. The important factor in using the potential fertility of sows is to use for reproduction boars characterized by a high-level sexual activity and the appropriate quantity and quality of semen (Czarnecki et al. 2000). The economic factor is of high significance in the utilization of boars employed for insemination, including the production of sperm with a high number of sperm cells and the associated number of the prepared insemination doses. The process of semen production varies over time and depends on various endo- and exogenous factors. The exogenous factors having strong effect on live organisms are, among others, the seasonal factors. Beside the breed effect and the crossbreeding effect, season of the year is an important factor influencing boar fertility (Smital et al. 2004). A relationship has been revealed between the environmental factors associated with season, such as ambient temperature (Suriyasomboon et al. 2004), daylight duration (Sancho et al. 2004), radiation intensity (Weiler et al. 1996) and the properties of semen. Elevated ambient temperature in connection with the reduced ability for temperature regulation in pigs suppresses the reproductive functions in males, reducing their sexual activity (Owsianny et al. 2004). Claus and Weiler (1985) report that changes of the daylight duration occurring over a year are the main reason for the seasonal variations of testicle functions and the changes of testosterone concentration in blood. Despite numerous studies regarding the influence of seasonal factors on sperm properties, there is no unanimity on the direct reasons for season's influence on the properties of the ejaculate of boars utilized for insemination.

The aim of this work was to determine the influence of season on the physical properties of the ejaculate collected from boars used for insemination.

Material and methods

The material for the analyses comprised 30,160 ejaculate samples collected from 81 boars of the Polish Large White breed (Polish abbrev. *wbp*) and 182 boars of the Polish Landrace (*pbz*) used in the Zielkowice Sow Insemination Station, a branch of the Mazowieckie Centre for Breeding and Reproduction of Animals in Łowicz. The ejaculate was collected manually (King and Macpherson 1973) in the time intervals of 4-5 days. The examined ejaculate was taken from boars utilized for at least 6 months and qualified for insemination in the period from 01.01.1992 to 31.12.2007. All ejaculate samples were assessed with respect the following physical criteria:

- ejaculate volume,
- sperm cells concentration,
- percentage of sperm cells exhibiting proper movement,
- total number of sperm cells in ejaculate,
- number of insemination doses obtained from one ejaculate.

The ejaculate volume was determined after separation of the gelatinous fraction, by weighing the ejaculate mass on electronic scales. The concentration of sperm cells in the ejaculate was determined by colorimetry, using a spectrophotometer. This method is based on the measurement of the light intensity transmitted through the sperm cells suspension in isotonic to sperm solution containing sodium chloride or sodium citrate. The percentage of properly moving sperm cells was determined by microscopic examination. Determined under about 200-fold magnification was the per cent content of the properly moving sperm cells in the total number of sperm cells visible in the field of view. The total number of mobile sperm cells and the number of insemination doses obtained from one ejaculate were calculated using the SYSTEM SUL software.

The collected data were grouped in 12 sub-groups containing the ejaculate collected in the individual months of the year (Tab. 1).

Tab. 1. Number of the ejaculate samples collected from pig boars in the individual months.

Month	Breed		Total
	wbp	pbz	
I	850	1819	2669
II	717	1672	2389
III	839	1794	2633
IV	878	1903	2781
V	825	1803	2628
VI	844	1744	2588
VII	822	1656	2478
VIII	755	1628	2383
IX	727	1569	2296
X	757	1583	2340
XI	764	1656	2420
XII	830	1725	2555
Total	**9608**	**20552**	**30160**

The variability analysis of the examined sperm properties has been carried out using the following mathematical model:

$Y_{ijk} = \mu + a_i + b_j + ab_{ij} + e_{ijk}$

where

Y_{ijk} – value of the examined feature,

μ – population average,

a_i – boar breed's effect,

b_j – season's effect,

ab_{ij} – effect of the controlled factors' co-operation,

e_{ijk} – error.

The significant differences between the groups were found by means of the Tukey test.

Results and discussion

Table 2 presents data that characterize the physical properties of the ejaculate collected from the pig boars of the wbp and pbz breeds in the individual months. The data reveal that the season exerts an effect on most of the physical features of the ejaculate. In the insemination practice the total number of sperm cells is of major importance, as it determines the number of insemination doses prepared from the ejaculate and eventually, the economic usefulness of the boar used for insemination. The least sperm cells were determined in the ejaculate collected in May (84.68 billion on average) while in the following months an increase was observed until

December, when the number reached the value exceeding 100 billion sperm cells in the ejaculate. The patterns of the sperm cells number variations in the ejaculate for both examined boar breeds were similar (Fig. 1).

The highest number of the insemination doses was prepared from the ejaculate collected in December (nearly 30 doses from one ejaculate). The least doses were obtained from the ejaculate collected in the springtime (March, April, May). From May to December, the number of the insemination doses obtained from the ejaculate gradually increased. The highest numbers of insemination doses from the ejaculate of the pbz pig boars were obtained in November, December and January whereas the highest numbers of insemination doses from the wpb pig boars were prepared in October, November and December (Fig. 2).

Data presented in Tab. 2 show also that the season influences the volume of the ejaculate. The lowest volume ejaculate was obtained in the springtime (March through May) and was about 40 ml less than the ejaculate volume obtained in November and December (P≤0.01). In the summer months (June through September), the ejaculate doses were of similar volume, containing in the range from about 273 ml to about 277 ml and showing an increasing tendency in the following months. The patterns of the ejaculate volume changes regarding both breeds, *i.e.* the wbp and pbz, were similar (Fig. 3).

Ejaculate with the highest concentration of sperm cells was collected between December and April. May through November the concentration of sperm cells in the ejaculate was considerably lower. Seasonal variations of the sperm cells concentration in the ejaculate from both examined breeds were similar (Fig. 4).

On the basis of the data presented in this study, it may be concluded that the best ejaculate, *i.e.* having the largest volume and containing the highest number of sperm cells, can be collected from male domestic pig in the autumn and winter months (November, December). The ejaculate collected in that period yields the highest number of insemination doses. The favourable properties of the ejaculate collected in the autumn and winter months have also been described in other Polish and foreign papers (Łyczyński 1991, Kunavongkrit et al. 1995, Liao et al. 1996, Kondracki et al. 1997, Ciereszko et al. 2000, Kozdrowski and Dubiel 2004a, Pokrywka and Ruda 2004). However, there is no agreement upon the reasons differentiating the ejaculate properties with relation to the season. Some authors connect the seasonal changes in semen with the seasonal variations of the ambient temperature and air humidity (Stone 1982, Larsson and Einarsson 1984, Kunavongkrit et al. 2005), others claim that the daytime duration and the intensity of radiation are the critical factors determining ejaculate properties (Zaicev 1995, Ciereszko et al. 2000, Sancho et al. 2004, Rivera et al. 2005).

Nonetheless, the influence of those factors on the sperm quality is not explicit. Weiler et al. (1996), employing a light reverse programme in May and June have observed an increased testosterone secretion in the pig boars, reaching the values typical for autumn thus, for the period when the ejaculate usually bears the most favourable properties. Claus et al. (1985) obtained similar results. They observed an increase of the sex hormones in blood and sperm plasma of the pig boars subjected to the influence of a short daytime. Likewise, the studies by Borga et al. (1993) conducted on pig boars of various breeds revealed an increase of the testosterone concentration in blood when the daytime shortened whereas Andersson et al. (1998) reported a reduction in the testosterone concentration in the pig boars utilized for insemination kept in the conditions of a shortening daytime. When shortening the duration of daytime in the summer, a larger volume ejaculate, containing more sperm sells (Zaicev 1995) and with higher sperm cells concentration (Ciereszko et al. 2000) may be obtained than in the long daytime period. In the autumn and winter period when daytime is short the ejaculate volume is usually the largest with high sperm cells concentration (Pokrywka and Ruda 2001, Wysokińska et al. 2005). In the present study, the most suitable ejaculate, *i.e.* the largest volume and with the highest number of sperm cells, was obtained in November and December. Therefore, a hypothesis has been formulated that the seasonal changes in the sexual activity of pigs may result from the close relationship between the domestic pig and the European wild boar (Kondracki et al. 1997). The European wild boar *(Sus scrofa ferus)* is regarded one of the main ancestors of the contemporary domestic pig; biologically they are the same species. Crossbreeding of the domestic pig and the European wild boar can be successful, with fertile offspring. The wild boar is monoestrous, with a short period of sexual activity. According to Kondracki et al. (1997), one of the important reasons for the seasonal changeability of the sperm properties is the atavistic predisposition for higher sexual activity during the natural to the wild boar rut and to the lower sexual activity in the period unfavourable to the species reproduction. Polyestrousness of the domestic pig is unnatural and has developed as a result of the domestication. The peak of the reproduction period for the wild boar occurs in autumn and winter (November-December) that is when most females enter the heat period and males' libido is elevated. In autumn, male testicles grow considerably and the level of testosterone in blood increases, reaching the highest values in late autumn and in winter (Mauget and Boissin 1987), that is when the best ejaculate can be collected from the pig boar. Likewise, in the hybrids of the wild boar and the domestic pig in that period, the peak of the sexual activity can be observed, indicated by the production of the largest volume sperm, containing the

highest total number of sperm cells, with a high percentage of motile sperm cells (Kozdrowki and Dubiel 2004b) and with the maximum concentration of testosterone in blood (Gromadzka-Ostrowska et al. 1999). The mechanisms controlling the seasonal reproduction in the wild boar may be related to the changes of the daytime and darkness duration over a year, having effect on the secretory activity of the hypothalamus-hypophysis-gonads axis through the pineal gland and the produced melatonin hormone (Kozdrowski and Dubiel 2004c). The analysis of the seasonal changes of the male domestic pig ejaculate properties allowed a conclusion that these properties have a genetic background and reflect an atavistic relationship between the domestic pig and its wild kin (Kondracki et al. 1997). In summer time, when the wild boars reveal diminished sexual activity, the pig boars reveal unfavourable ejaculate properties indicated by smaller volumes of the obtained ejaculate and a smaller number of sperm cells in the ejaculate and eventually by the lower number of the prepared insemination doses. The present study has also revealed that ejaculate collected in the spring time was characterized by a smaller volume and a lower number of motile sperm cells than in the other seasons.

Concluding, it should be stated that ejaculate of the male domestic pig exhibits the most favourable properties in November and December whereas March, April and May are characteristic for the lowered parameters of the ejaculate. More insemination doses can be prepared from the ejaculate collected in autumn and winter than from those collected in spring and summer. Pig boars of the wbp and pbz breeds reveal similar susceptibility to the influence of the seasonal factors.
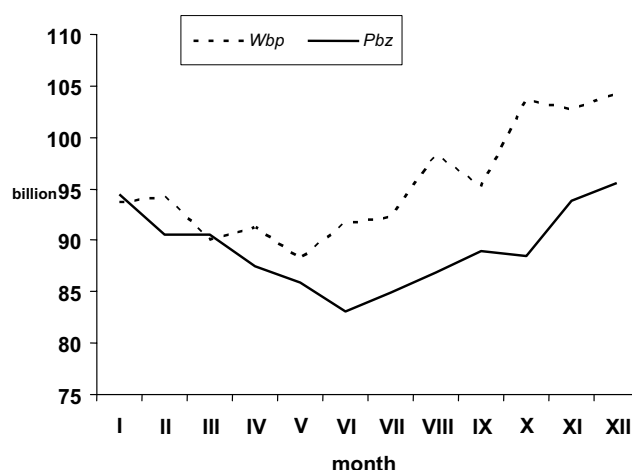

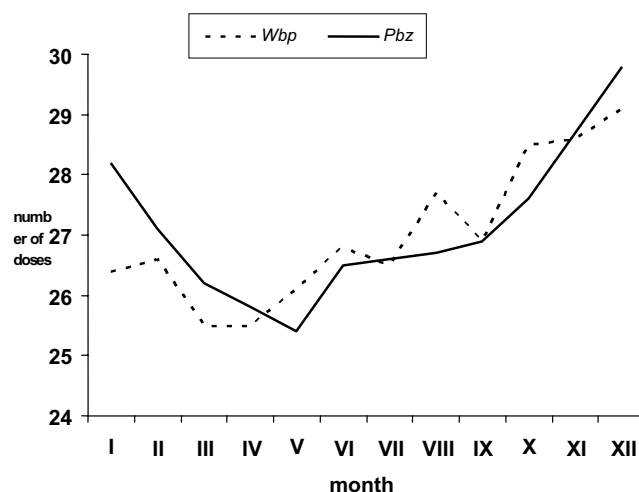**Fig. 1.** Total number of sperm cells with relation to the season.

Fig. 2. Number of insemination doses with relation to the season.
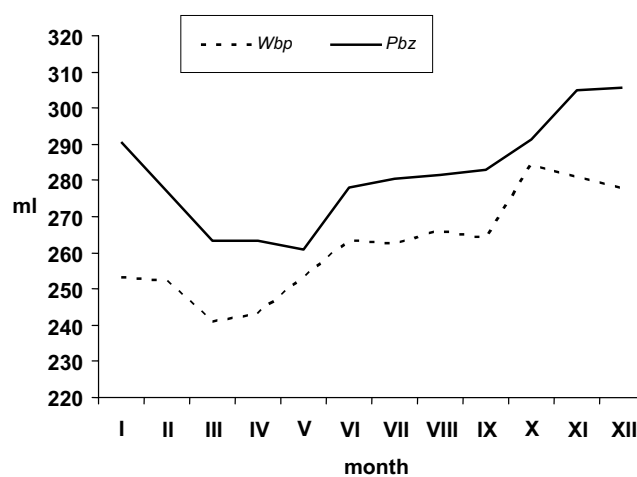
Fig. 3. Ejaculate volume with relation to the season.
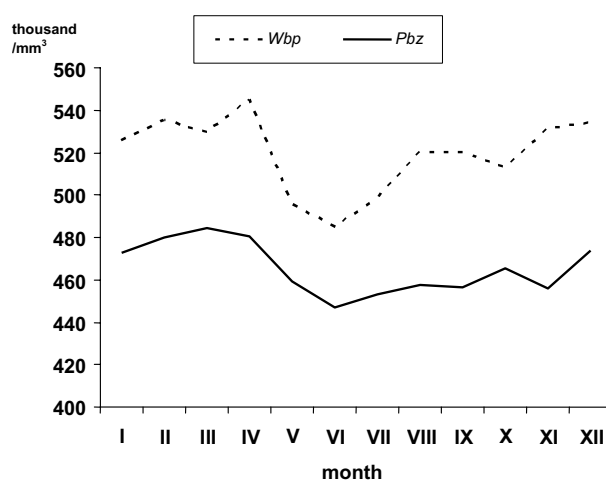
Fig. 4. Sperm cells concentration with relation to the season.

Tab. 2. Physical properties of the assessed ejaculate in the individual months of the year (average for pig boars of the wbp and pbz breeds).

Specification		Month												NIR$_{0.05}$	NIR$_{0.01}$
		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII		
Number of ejaculates		2669	2389	2633	2781	2628	2588	2478	2383	2296	2340	2420	2555		
Volume of the ejaculate (ml)	$\overline{X}$	278.85	269.59	256.15	256.83	258.46	273.29	274.57	276.58	277.08	289.13	297.34	296.78	8.30	9.50
	sd	96.78	93.13	89.02	89.74	89.11	91.85	93.86	92.73	93.75	96.18	101.61	100.32		
Sperm cells concentration (thousand/mm^3)	$\overline{X}$	489.86	496.64	498.73	500.93	470.93	459.59	468.34	477.32	476.86	480.79	479.84	493.50	15.89	18.17
	sd	180.97	183.85	183.05	182.36	167.68	160.92	176.06	183.22	186.18	177.58	190.39	186.59		
Percentage of sperm cells exhibiting progressive movement	$\overline{X}$	71.86	71.71	72.10	71.74	72.64	72.93	72.50	72.10	72.20	72.20	72.32	72.70	0.70	0.79
	sd	7.99	8.10	8.03	7.78	7.79	7.53	7.60	7.82	7.80	7.86	7.94	7.86		
Total number of sperm cells in ejaculate (billion)	$\overline{X}$	94.26	91.62	88.35	87.60	84.68	87.14	88.70	91.89	90.66	97.04	97.81	101.92	2.87	3.29
	sd	33.18	31.63	32.23	30.45	29.76	30.36	30.44	38.34	31.57	35.21	33.92	33.43		
Number of insemination doses (piece)	$\overline{X}$	27.66	26.94	26.04	25.69	25.64	26.61	26.56	27.04	26.94	27.87	28.68	29.58	0.76	0.87
	sd	8.92	8.70	8.42	8.12	8.04	8.33	8.29	8.74	8.87	8.84	9.31	9.29		

Abstract

A study was carried out of 30,160 ejaculate samples collected from 81 boars of the wbp (Polish Large White) breed and 182 boars of the pbz (Polish Landrace) breed. The ejaculate was collected manually with the sampling frequency of 4-5 days. An assessment of the ejaculate has been done with regard to the following physical properties: ejaculate volume, sperm cells concentration, percentage of sperm cells exhibiting proper motility, total number of sperm cells in the ejaculate and number of insemination doses obtained from one ejaculate. The collected data have been analyzed according to the season criterion with indication of the ejaculate collected in the individual months. It has been revealed that the most suitable ejaculate was collected from the domestic pig boars in November and December whereas in March, April and May the parameters lowered. The ejaculate collected in the springtime is characterized by a lower volume and a lower number of the motile sperm cells than in the other seasons. From the ejaculate collected in the autumn and winter period more insemination doses can be prepared than from those collected in spring and summer. No difference has been found between the boars of the wbp and pbz breeds with regard to their susceptibility to the seasonal factors' influence.

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ATTITUDES OF OLDER PEOPLE TOWARDS HEALTH

Key words: attitudes towards health, older people, gender

Introduction

An integrating character of health promotion allows to and obliges to draw from research achievements of various fields, including: health protection as well as social and economic sciences. Over the last decades, a number of authors have been perceiving sociology as the key partner in modeling the contemporary identity of health promotion.

The concept of the complementarity of sociology in respect of health and health promotion in Poland was presented, among others, by Słońska and Piątkowski (Piątkowski 2005, Barański 2002).

> *„The developing sociology of health places health, its protection and promotion in the focus of theoretical, research and practical interests. A growing interest in the category of health as a declared and accomplished value has also greatly contributed to its development. In this approach, a sociologist of health may also promote health in the work, school and living environment as well as be a leader of a social movement affirming a health-promoting lifestyle”.*
>
> (Piątkowski 2005)

An increase in the level of self-consciousness in respect of health is determined by age, life experience, tradition, fashion, education and – most of all – by health hetero- and autoeducation. All this creates the health culture of man that may be manifested by health needs and behaviors, and individual standards of the care over own health. From the viewpoint of sociology and sociologists, an accurate diagnosis of the level and character of the health culture may be made based on attitudes expressed towards health.

In literature addressing public health, health promotion and sociology, investigations of attitudes towards health are sparse and selective. The most extensive analysis of that issue was provided by Demel, who in his theore-

tical works characterized it from the point of view of an astute observer, historian, teacher and physician (Demel 1974, 1980).

The major practical task of health promotion and health education is the propagation, possibly on the mass scale, of the health-promoting lifestyle. Nevertheless, in order to enable indispensable transformations in the awareness and health behaviors it is necessary to identify and analyze the existing attitudes towards health.

Attitudes towards health in selected literature

An attitude is an issue being the basic element of the sociological concept of man. Attitudes determine the stance of man to the surrounding social reality and constitute a disposition for his behaviors. From the sociological perspective, an attitude is a "construct" with a complex structure. Rokeach defines an attitude as "relatively stable organization of believes referring to a specified object or situation, predisposing a person to respond to them in a specified way". In turn Nowak describes it as "a total of relatively stable dispositions to evaluate an object and emotional response to it or as relatively stable believes on the nature and properties of that object and relatively stable disposition to respond to that object which may potentially accompany the aforementioned emotional-evaluation dispositions" (Majchrowska 2003).

The creator of the Polish pedagogy of health – Demel – has described in his books a wide array of attitudes towards own health and that of the others. The attitudes characterized by that author included, among others: absent-mindedness, brutality, joking, callousness and Samaritan (charitable), i.e. those that illustrate the way of referring to health or disease of the others. The attitudes of people to their own health and sickness, presented by Demel, are highly diversified, ranging from irrationally oversensitive to thoughtless as wells as exaggerating the health status and its threats. Out of those attitudes, Demel proved in-depth description of: the attitude of drug-dependence, hypochondria, cancerophobia, hysteria and even terrorism (...or I will dye...). He additionally indicated calculating and exploratory attitudes assuming the exploitation and damage of own health, as well as described attitudes of ambition and snobbery. That extremely rich and colorful list of attitudes has, however, never been diagnosed nor verified empirically (Demel 1980).

The preservation of utilitarian, cultural and health independence until late senility is determined not only by genetic factors but also by the early care over health and the creation of conditions (of environment) that facilitate the optimal development of the functioning of man. Nevertheless, we happen to get off this track, when we acknowledge the subordination of the

others to us as the only measure of self-esteem, when the attitude towards the others is driven by a wordless rule governing the impulsive behavior: "you shall now take care over me". That infantile behavior is not so sparse, and perversely is referred to as "an inferiority complex" and consists in feeding on the good will of the others, especially when it attains forms of hypochondria, consciously cultivated weakness and helplessness (Sujak 2006).

Mindfulness, care and control over health are symptoms of an auto-creative attitude towards health (Woynarowska 2007). A number of authors address the problem of care over health. Ostrowska depicts two opposite approaches, i.e. care over health as: medical behaviors referring most of all to older people and those with lower assessment of their health status, and as health-promoting behaviors. Results of a survey by Puchalski and Korzeniowska demonstrate that barely a few per cents of the society are leading "relatively permanently" a healthy life. Results of their research enabled identifying a few groups of people exhibiting a passive attitude towards their own health, including: obstructive persons, withdrawn persons, the so-called common people declaratively affirming health promotion and practicing health-promoting behaviors fragmentarily. According to Gniazdowski, the past times the Polish society had been living in, have developed a claiming attitude, i.e. shifting the responsibility and care over health onto the state and the system. The second attitude developed in times of the real socialism is learned helplessness, reluctance or even incapability of independent activity (Woynarowska 2007).

In a sociological criticism of health promotion, Słońska warns against the phenomenon of "health terrorism" (healthism), *i.e.* conveying the responsibility for health from the system onto persons who are not capable of coping those demands. The ideology of healthism means the cult of health or even health terrorism resulting in the expectation that people will subordinate their life to health, and stigmatizing those who do not conform to the propagated standards. In other work, the author mentions the attitude of health abnegation, claiming for the identification of its causes (Majchrowska 2008).

Health of older people with consideration given to health and social policy

As one of the stages of human life, senility is multi-directional in character. From the viewpoint of biology, it means the successive degradation of functions of the body, most simply comprehended as a decrease in the level of organism functionality including changes that proceed in all systems of organs, i.e. skeletal, muscular, digestive, respiratory, urogenital, endocri-

ne, vascular, neural as well as in organs of senses and in skin. Somatic changes contribute to redefining psycho-social relations by restricting the family and social roles. In literature on the subject, the advanced age is characterized as a natural inclination of man to exhibit such traits as: egocentrism, conservatism, overbearing nature or hypochondria. Other traits described in this respect include: deceleration of all psychical activities, inclination to regression, turning back of the present and the future (Pacyna 1990, Trafiałek 1998).

A suppressing secretory activity of hormones (pituitary gland and others) disturbs adaptation processes. It results in the ossification of views and incapability of transformation along with gathering new experiences. An old man is characterized by being moved easily, the so-called senile wisdom – expressed by the sense of infallibility of own judgment and the narrowing of interests (senile egotism) (Kachaniuk 2002).

According to words by John Paul II, "In some societies, senility is valued and esteemed, whereas in others – it is far less respected, since mentality of those societies affirms first of all the temporary functionality and effectiveness of man. Upon the impact of that attitude, the so-called "third" or "fourth" age is often disrespected, and the older people are forced to ask themselves a question whether their life is still useful" (Jan Paweł II 1999).

Undoubtedly, an increasing population of people at the old age raises a growing concern over that generation in most of European countries and world wide. Various problems of the old people are the subject of theoretical and research works of researchers representing different branches of science. In turn, the problem of satisfying needs of the ageing societies is a great challenge to public institutions and social services.

The ageing of societies has become a severe global health problem, hence in the year 2002 in Madrid, the World Health Organization (WHO) presented the Framework Policy Referring to the Active Ageing. Two documents were adopted as well, including: Political Declaration and International Plan of Action referring to the Active Ageing. Both documents carry a message to world societies that encourages them to strengthen social behaviors oriented towards complete acceptance and development possibilities of older people. Effects expected to be reached by 2015 assumed, among others, the gaining of the sense of full health, safety and active participation in economic, cultural, social and political life by the older persons (Narodowy Program Zdrowia 2007).

By using a new term "successful ageing", psychologists point to a positive dimension of what is inevitable in the biography of each man. The ageing people have a number of inclinations that could be an inspiration to the improvement of the quality of their life. The successful ageing includes such

capabilities as: transformation of own life in order to focus it on what is crucial and meaningful, creation of a positive attitude towards senility, setting new challenges and social roles (Rathus 2004).

Aim

The main objective of this study was to identify and present declared attitudes of older persons towards health. It was additionally aimed at depicting believes and degree of respondents acceptance of such attitudes as: drug-dependence, quackery, cancerophobia, hysteria, hypochondria, megalomania, neurastenia, exploitation, ambition, abnegation, absent-mindedness, callousness, claiming attitude, Samaritan and health-promoting.

Analyses were also conducted in order to determine whether gender differentiated answers of the respondents referring to the investigated attitudes towards health.

Research methods

The study into the attitudes fostered by older people towards health was conducted with the method of a diagnostic surveys using a questionnaire survey. A research tool applied was a self-designed questionnaire that contained 16 statements characterizing selected attitudes towards health. Each of them was ascribed a 5-degree scale of Likert that enabled determining the degree of respondents acceptance (disposition) of each attitude surveyed (1 – I definitely agree, 2 – I agree, 3 – I have no opinion, 4 – I do not agree, 5 – I definitely do not agree). That scale, being an ordinal type scale, in social surveys happens to be treated as an interval scale (Szwed 2009). Hence, the preliminary analysis of the collected statistical material was conducted by means of descriptive characteristics of distribution, including an arithmetic mean and standard deviations. In turn, the effect of a "gender" variable on the degree of acceptance of views describing the attitudes of the older respondents towards health was determined with the use of parametric and non-parametric tests. Due to a low number of men in the sample, finally use was made of a Chi-square independence test.

Results

The survey was conducted in the year 2009 amongst 106 respondents at the age of 51 – 81. Majority of them were members of Seniors Club and Third Age Universities acting in the city of Biała Podlaska. The sample was

constituted by 71% of women and by 29% of men. A subjective evaluation of living standards of the respondents is depicted in Fig. 1.
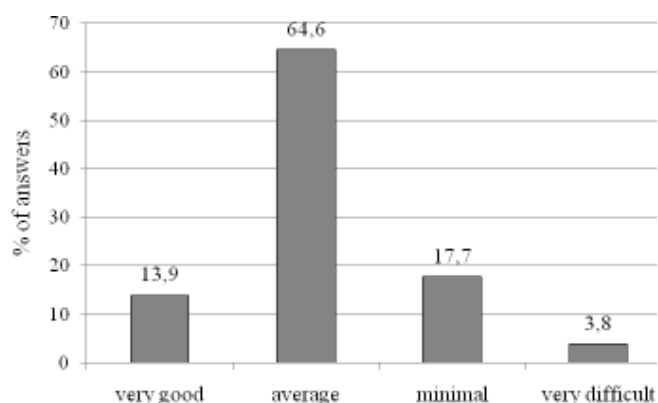
Fig. 1. Living standards of the respondents.

The evaluation of attitudes towards health was conducted taking into account health "as a whole".

Manifestations of attitudes towards health were measured on a 5-degree scale, where 1 was interpreted as a strong identification of the respondent with the attitude, whereas 5 – as its negation. The scale was treated as an interval scale. The descriptive statistical measures computed in the study are presented in Tab. 1.

Tab. 1. Descriptive statistical measures of the degree of acceptance of views describing attitudes of the respondents towards health.

Attitude towards health	Mean value	Standard deviation	Variability coefficient	Median
drug-dependence	3.31	1.26	38%	4
quackery	3.48	1.29	37%	4
hypochondria	2.54	1.24	49%	2
cancerophobia	2.79	1.42	51%	2
ambition	3.47	1.29	37%	4
neurastenia	3.11	1.38	44%	4
exploitation	2.99	1.40	47%	3
hysteria	1.91	0.94	49%	2
abnegation	3.62	1.25	34%	4
megalomania	3.01	1.34	45%	2
promotion (autocreation)	1.75	1.00	57%	2
claiming	1.77	0.97	55%	2
cult (healthism)	1.71	0.86	50%	2
Samaritan	1.77	0.93	52%	2
absent-mindedness	2.71	1.32	49%	2
callousness	3.12	1.34	43%	4

Source: own calculations.

In analyzing the results it may be observed that answers of the respondents in respect of some attitudes were highly differentiated. In many cases, the coefficient of variability oscillated around 50%, which indicates that the standard deviation constituted half the value of an arithmetic mean. It may be stated, therefore, that the respondents did not constitute a homogenous sample in terms of the traits examined.

The greatest degree of respondents acceptance was noted in respect of such attitudes towards health as: hysteria, promotion (autocreation), claiming, cult and Samaritan (Fig. 2).
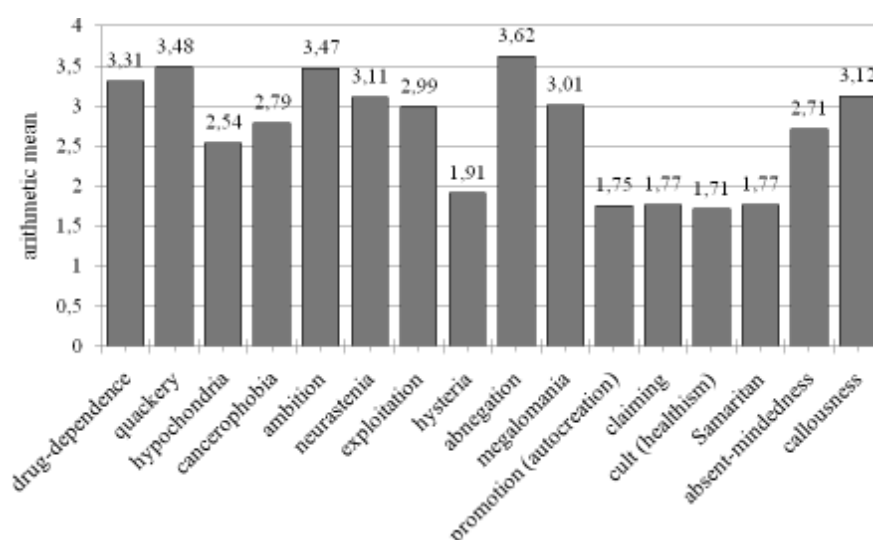
Fig. 2. Mean degree of acceptance of views describing attitudes towards health in the opinion of the respondents.

The statement that: "We should not disregard even the slightest symptoms of a disease. Ignoring them may lead to a severe condition and even to death" was accepted by 90.6% of the respondents (including 33% of answers "I definitely agree", *i.e.* every third respondent). The attitude of health promotion was described with a statement: "We should be responsible for our future, for health in particular. We should take care over it, strengthen and control it as well as extend knowledge about it". It was accepted by 88.7% of the respondents, including half the respondents that provided the answer "I definitely agree". The claiming attitude was expressed by 88.7% of the older persons surveyed. The statement that "Each man has the right to unlimited and immediate access to the accomplishment of health needs, in the form of specialist medical examinations and versatile treatment" was definitely accepted by 46.2% of all respondents. The cult of health comprehended also as a "health obsession" was described as the care over health requiring maximum self-discipline, focusing on the improvement and shap-

ing of the body, its sizes and appearance, as well as on the conviction that health is the most precious thing. That opinion was shared by 90.6% of the respondents (with 47% of the respondents agreeing to it definitely). In turn, 89.6% of the surveyed people were identifying themselves with an opinion that each man should unselfishly help the other person in circumstances of diseases or health threat irrespective of the degree of relationship. Such a Samaritan attitude, originating from the history of the New Testament, was definitely accepted by 44.3% of all respondents.

The results obtained did not allow for explicit interpretation of the acceptance of the attitudes of, primarily, neurasthenia, exploitation, megalomania and callousness. The percentage of persons accepting those attitudes was similar to that of the respondents negating them (*ca.* 50% of answers from each of these groups).

The results did not demonstrate either the definite or unequivocal tendencies for the negation of the attitudes analyzed in the study. Every fourth respondent did not agree definitely to the attitudes of quackery and abnegation, whereas every fifth – to the attitudes of ambition and drug-dependence. The percentage of respondents not accepting those attitudes ranged from 61.0% to 70.5%.

In respect of the other evaluated manifestations of attitudes towards health (hypochondira, cancerophobia and absent-mindedness), *ca.* 60% of the older people surveyed were identifying themselves with them.

The undertaken research addressed also the problem of determining the effect of gender on the acceptance of attitudes towards health. Due to a low number of men in the sample surveyed (29%), respective categories of answers were combined. In this way, the respondents were divided into two groups: accepting or not-accepting the descriptions of attitudes provided in the questionnaire. Thus prepared data were subjected to an analysis with the Chi-square independence test or in the case of not meeting the assumptions – with the exact Fisher's test. A statistically significant result of the test ($\chi^2=13.85$; df=1; p<0.001) was obtained only in respect to one attitude towards health, *i.e.* to health promotion attitude (autocreation). Differences in answers as affected by gender of the respondents were depicted in Tab. 2.

Tab. 2. Health promotion attitude *versus* gender of the respondents (% from a column).

	woman	man
I definitely agree or I agree	95.9%	70.0%
I definitely do not agree or I do not agree	4.1%	30.0%

Source: own calculations.

Results of analyses indicate that almost all women were identifying themselves with the health promotion attitude. Amongst men, that percentage was lower and accounted for 70%. It may thus be concluded about a greater disposition of the women, which was manifested in the practicing of that attitude in the their life.

Discussion and final conclusions

A small number of men in the sample surveyed (29%) may be referred to results of nation-wide surveys, according to which the number of men at the age of 75 and over in the population is twice lower than that of the women (Bogusz 2003).

The greatest degree of respondents acceptance was reported in respect of such attitudes towards health as: hysteria, promotion (autocreation), claiming, cult and Samaritan. As many as 90% of the respondents were identifying themselves with those attitudes.

According to A. Gniazdowski, conditions the Polish nation was living in the after-world period were determining behavioral expectations expressed in the claiming attitude. It was characterized by excessive conveying the responsibility for satisfying the basic needs of an individual, including those linked with health, to the state and its subunits, and by a situation when the citizens were discharging themselves from the responsibility for and care over their own health (Woynarowska 2007).

The results demonstrate no definite nor unequivocal tendencies for the negation of the attitudes analyzed in the study.

Most of the respondents (60% – 70%) did not manifest such attitudes towards health as: abnegation, ambition, quackery and drug-dependence.

According to Ostrowska, "health abnegates" are persons who do not undertake any actions aimed at health preservation and, simultaneously, avoid any contacts with medicine. As demonstrated in a study conducted by the Institute of Philosophy and Sociology of the Polish Academy of Sciences (1995), they constitute *ca.* 20% of the society (Majchrowska 2008).

The results obtained did not allow for demonstrating tendencies in manifestations of attitudes of: neurasthenia, exploitation, megalomania and callousness. The percentage of persons accepting those attitudes was similar to that of respondents negating them (*ca.* 50% of answers from each of these groups).

Gender was found to affect the manifestations of attitudes of the older persons towards health only to a very small extent.

Significant differences in answers of women and men were demonstrated only in respect of the health promotion attitude (autocreation). Almost

all women surveyed were manifesting the attitude of health promotion. Amongst men, this percentage was also high, yet lower than in the women, and accounted for 70%.

In the Polish society, a woman is the person taking care over healthy and sick family members, and providing their health needs. Women possess greater health awareness and better knowledge on symptoms of diseases (Ostrowska 1999).

Abstract

The implementation of positive transformations in the awareness and health behaviors of selected social groups requires identifying and analyzing their current attitudes towards health.

The major objective of the study was to identify and present selected attitudes of older persons towards health. It was conducted with the method of a diagnostic survey amongst 106 respondents, with consideration given to gender of the surveyed.

The greatest degree of respondents acceptance was reported in respect of such attitudes towards health as: hysteria, promotion, claiming, cult and Samaritan. As many as 90% of the respondents were identifying themselves with those attitudes. The gender was found to exert a significant effect only on differences in answers referring to the attitude of health promotion (auto-creation).

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Joanna Baj-Korpak

FACTORS DIFFERENTIATING AND DETERMINING THE LEVEL OF RESULTS IN THE RACE WALKING OF WOMEN OF HIGH QUALIFICATION

Key words: race walking, training loads

Introduction

Contemporary training is an extremely complex process, having a variety of aspects, just to mention the biological, psychical, social or methodical one (Sozański 1986, 1999). Its effectiveness is determined by various factors, the knowledge of which is the backbone of the whole training activity. Today, the management of the training process is impossible without earlier in-depth exploration of the specificity of a given sports discipline or event. Although the basic rules and principles stem from biological determinants of a body, yet the prerequisite of an effective action is the determination of the motor and functional requirements of a given sports discipline.

In the era of pursuit for success, in the area of competitive sport a necessity is appearing for the acquisition and extension of knowledge on the theory and practice of training. By setting a goal, a competitor strives to achieve it in an optimal way – the best way possible under specified conditions (Ryguła 2000, 2005). Therefore, the development of knowledge on the training process necessitates the collection and elaboration of any data on loads, that form grounds for the rational management of that process and enable the application of solutions based on scientific premises.

The analysis of training loads is an indispensable element in the improvement of the training work of a coach, enabling the control over the training, according to the adopted plan (Naglak 1979). A comparative analysis of the loads realized along with the sports condition of a performer enables the evaluation of the effectiveness of training and verification of training plans.

Methods

The objective of the reported study was a trial of selecting factors that differentiate and, simultaneously, determine a sports level in women' race walking.

The study covered 35 one-year training macrocycles. The material collected was divided into three blocks. The criterion of classification was a sports level (the best score in a given season) displayed by the sportswomen analyzed. In the evaluation of the sports level, consideration was given to the score tables by the International Association of Athletics Federation (IAAF) – www.iaaf.org of the 10th of March 2007. The best sports results of a given season were converted into IAAF scores.

The first block was a compilation of material describing 15 one-year training cycles, the second block – that of 9 one-year training cycles, and the third (the highest level of performance) – that of 11 one-year training macrocycles.

The analysis was conducted for the material referring to the training work performed by the women competitors examined. The material was collated in the so-called training diaries elaborated for race walk or generally for endurance athletic events.

In the study, use was made of a method elaborated by Ważny (1981), which enables the analysis of loads from the perspective of two influence directions:
- classification of training loads in terms of the type of preparation (the so-called information area),
- classification of training work determined by criteria stipulated by Wołkow as well as Wołkow and Koriagin (1977), taking into account effects of the loads on the energetic mechanisms of the body (the so-called energetic area), with modifications by Sozański (1986) which consisted in the determination of the zones of training intensity.

This method may be claimed a complex one, as it allows to consider three directions of training effects (**v**ersatile, **d**irected and **s**pecial) and five basic areas of training intensity (sustaining efforts – T_1, aerobic – T_2, combined – T_3, anaerobic lactate – T_4 and anaerobic non-lactate – T_5). For methodological reasons, the sixth area (T_6) was determined additionally that covered exercises intensifying the anabolic processes (exercises developing the muscle strength). This method enables load evaluation by summing up the "crude" time of work in particular areas: information and energetic ones (Ryguła 2005).

The basis of the training load analysis, describing their size and structure in the subsequent phases of the cycle, is the record of the training means

groups in race walking elaborated by Krzysztof Perkowski (Sozański, Śledziewski 1995), modified by the authors of this study.

In gathering and processing the training data of the sportswomen examined, use was made of computer techniques. Analyses were conducted by means of TreOb-4 software worked out within the Central Programme of the Basic Research at the Department of the Theory of Sports, Academy of Physical Education in Warsaw (Kosmol, Sozański 1991; Sozański, Śledziewski 1995).

Differences in training loads between three groups of sportswomen were evaluated with the use of a one-way analysis of variance (a parametric test ANOVA), and the Kruskal-Wallis test (a non-parametric test). Once the result was significant ($p < 0.05$), the differences between groups were evaluated with the Tukey (RIR) test (for parametric tests) or with the multiple comparison test (for the Kruskal-Wallis test). Next a discrimination analysis was conducted with the aim to verify whether the groups of sportswomen examined differed in terms variable means and to indicate which of them contributed to group discrimination to the greatest extent.

Results

Results obtained in the area of total load values (TR) as well as in the information and energetic areas in a one-year cycle (CR) were presented in Tab. 1-9.

The analysis of the information area (Tab.1) showed that statistically significant differences ($p < 0.001$) in a one-year cycle were reported for the directed loads (D). The significance of differences referred only to the sportswomen displaying the lowest (I) and the most advanced (III) sports level (Tab. 2).

Data presented in Tab. 1 indicate also the likelihood than in the energetic area, in a one-year cycle, significantly different were the loads realized in the fourth (T_4) area of intensity, yet significant differences were noted between groups I and III (Tab. 3).

Tab. 1. Analysis of differences in training loads in a one-year training cycle of advanced women race walkers (one-way analysis of variance ANOVA).

Training load	SS Effect	MS Effect	SS Error	MS Error	F	p
V	7.140071E+10	3.570036E+10	7.556712E+11	2.361473E+10	1.512	0.236
D	3.374423E+10	1.687211E+10	1.335898E+11	4.174682E+09	4.041	0.027*
S	5.373216E+10	2.686608E+09	1.481116E+12	4.628486E+10	0.580	0.565
T_1	1.217920E+10	6.089601E+09	1.850580E+11	5.783061E+09	1.053	0.361
T_2	1.280454E+10	6.402269E+09	1.814947E+12	5.671708E+10	0.113	0.894
T_3	2.143520E+10	1.071760E+10	1.275566E+11	3.986144E+09	2.689	0.083
T_4	3.888939E+08	1.944470E+08	1.154867E+09	3.608959E+07	5.388	0.001**
V_1	1.175640E+10	5.878198E+09	2.567978E+11	8.024930E+09	0.732	0.488
V_3	7.598888E+07	3.799444E+07	1.277423E+10	3.991947E+08	0.095	0.909
S_2	5.178889E+10	2.589444E+10	1.190134E+12	3.719170E+10	0.696	0.506
S_4	7.031441E+07	3.515721E+07	1.012506E+09	3.164083E+07	1.111	0.342
Score at a distance of 10 km (IAAF scores)	1.323442E+05	6.617212E+4	2.284543E+04	8.159084E+02	81.102	0.001***

* – differences significant at p<0.05; ** – differences significant at p<0.01; *** – differences significant at p<0.001

Tab. 2. Differences in directed (D) training loads between three groups of sportswomen in a one-year training cycle (CR) – Post Hoc (RIR) Tukey test.

Sports level (acc. to Tab. 4)	I $\bar{x}$: 109457,3	II $\bar{x}$: 109833,9	III $\bar{x}$: 42713,8
I		0,999	0,036*
II	0,999		0,069
III	0,036*	0,069	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Tab. 3. Differences in training loads realized in the fourth area of intensity (T_4) between three groups of sportswomen in a one-year training cycle (CR) –Post Hoc (RIR) Tukey test.

Sports level (acc. to Tab. 4)	I $\bar{x}$: 12609	II $\bar{x}$: 7277.6	III $\bar{x}$: 5100.3
I		0.105	0.01**
II	0.105		0.702
III	0.01**	0.702	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Tab. 4. Differences in results of race walk at a distance of 10 km between three groups of sportswomen in a one-year training cycle (CR) –Post Hoc (RIR) Tukey test.

Sports level (acc. to Tab. 4)	I $\overline{x}$: 1030.2 (IAAF scores)	II $\overline{x}$: 1100.1 (IAAF scores)	III $\overline{x}$: 1185.1 (IAAF scores)
I		0.001[***]	0.001[***]
II	0.001[***]		0.001[***]
III	0.001[***]	0.001[***]	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Significant differences were also recorded for the types and intensities of combined training loads (Tab. 5). They covered versatile loads performed in the fourth area of intensity (V_4) – the differences referred to the sportswomen displaying the most advanced (III) and the lowest (I) sports level (Tab. 6). In the area of special training, the particular groups of women athletes were differentiated by the size of the work performed in the third (S_3) and the fifth (S_5) area of intensity (Tab. 5, 7, 8). In the case of the S_3 loads, it was observed that a higher value of that parameter had a positive effect on training. Differences were noted between groups I and III as well as groups II and III – the work of the most advanced sportswomen is characterized by a high utilization of S_3 loads. In analysing the special loads realized in the fifth area of intensity (S_5), significant differences were recorded between groups I and II as well as groups II and III. In that case, the women athletes from group II are recommended to increase the volume of those loads.

No statistically significant differences were found, in turn, in the total load value (TR) between the groups examined.

Tab. 5. Analysis of differences in training loads in a one-year cycle of advanced women race walkers – non-parametric KRUSKAL-WALLIS test (H).

Training load	Sum of ranks (division into groups acc. to Tab. 4)			H	p
	I	II	III		
TR	281.00	154.00	195.00	0.152	0.927
T_5	294.00	118.00	218.00	2.762	0.251
T_6	265.00	188.00	177.00	1.114	0.573
V_2	325.00	149.50	155.50	3.650	0.161
V_4	337.00	161.00	132.00	9.250	0.010**
V_5	291.00	144.50	194.50	0.620	0.733
V_6	257.50	208.00	164.50	3.316	0.191
D_2	273.50	177.00	179.50	0.571	0.751
D_3	311.00	188.00	131.00	5.669	0.059
D_4	293.00	144.00	193.00	2.294	0.318
S_3	228.00	130.00	272.00	6.945	0.031*
S_5	311.00	83.00	236.00	8.992	0.011*
Results at a distance of 5 km (IAAF scores)	124.00	110.00	201.00	18.648	0.001***

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Tab. 6. Differences in versatile training loads realized in the fourth area of intensity (V_4) between three groups of sportswomen in a one-year training cycle (CR) – Kruskal-Wallis test (H).

Sports level (acc. to Tab. 4)	I R: 22.467	II R: 17.889	III R: 12.000
I		0.868	0.030*
II	0.868		0.603
III	0.030*	0.603	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Tab. 7. Differences in special training loads realized in the third area of intensity (S_3) between three groups of sportswomen in a one-year training cycle (CR) – Kruskal-Wallis test (H).

Sports level (acc. to Tab. 4)	I R: 15.200	II R: 14.444	III R: 25.727
I		1.000	0.044*
II	1.000		0.049*
III	0.044*	0.049*	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Tab. 8. Differences in special training loads realized in the fifth area of intensity (S_5) between three groups of sportswomen in a one-year training cycle (CR) – Kruskal-Wallis test (H).

Sports level (acc. to Tab. 4)	I R: 20.733	II R: 9.222	III R: 21.455
I		0.023*	1.000
II	0.023*		0.024*
III	1.000	0.024*	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Tab. 9. Differences in results of a race walk at a distance of 5 km between three groups of sportswomen in a one-year training cycle (CR) – Kruskal-Wallis test (H).

Sports level (acc. to Tab. 4)	I R: 8.857	II R: 15.714	III R: 25.125
I		0.246	0.00004***
II	0.246		0.098
III	0.00004***	0.098	

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Statistically significant differences were also observed in sports results achieved at a distance of 5 km (Tab. 5) and 10 km (Tab. 1). In the first case, they referred to the sportswomen of the highest and the lowest classification (Tab. 9), whereas in the second – they referred to all analyzed groups (Tab. 4). The results obtained confirm the soundness of the selection of the criterion of sportswomen classification.

The analysis of variance was not conducted for the directed loads realized in the first (D_1), fifth (D_5) and sixth (D_6) area of intensity was well as for effects of the special loads realized in the first (S_1) and sixth (S_6) area of intensity. It results from the fact that the sportswomen were not performing any work in those areas.

The results obtained were next subjected to a discrimination analysis. Tab. 10 presents the model of variables for the prediction of affiliation to groups, involving three statistically significant variables (T_4, S_3 and S_5), determined in the analysis of variance. Data collated in the table indicate that the greatest contribution to discrimination had the variable T_4 – loads realized in the fourth area of intensity. This is indicated, among other things, by the value of the test of partial Wilk's Lambda (the closer the value to null, the greater the contribution of variable to discrimination). In total, the variables presented in Tab. 10 showed a high level of significance (p<0.001).

Tab. 10. Analysis of a discrimination function – training loads of advanced women race walkers in a one-year cycle – model of variables for the prediction of affiliation to a group.

Training loads	Wilk's Lambda	Partial Wilk's Lambda	F of removal (2.30)	p	Tolerance value	1-Toler. (R-quadr.)
T_4	0.722	0.615	9.352	0.001***	0.779	0.220
S_3	0.603	0.737	5.345	0.010**	0.723	0.276
S_5	0.554	0.801	3.703	0.035*	0.855	0.144

Wilk's Lambda – 0.444, F – 4.992, Significance level – p<0.001
* – differences significant at p<0.01, ** – differences significant at p<0.05,
*** – differences significant at p<0.001

Another step in searching for factors determining to the greatest extent the sports level involved conducting a canonical analysis (Tab. 11). Taking into account the model of variables for predicting affiliation to groups, two discriminatory functions were formulated (two roots), which turned out to be statistically significant. The first discriminatory function was significant at a level of p<0.001. After the removal of the first root, values of the second function (the second root) were not correlated with the values of the first function and exhibited statistical significance at a level of p<0.05.

Tab. 11. Chi-square test for successive roots (discriminatory functions) – for training loads of advanced women walk racers in a one-year cycle (CR).

Discriminatory function	Removed root	Own value	Canonical R	Wilk's Lambda	Chi-square	p
1	0	0.799	0.666	0.444	25.105	0.001***
2	1	0.248	0.446	0.800	6.885	0.031*

* – differences significant at p<0.05; ** – differences significant at p<0.01;
*** – differences significant at p<0.001

Next, calculations were made for the values of discriminatory function coefficients and for the accumulated percentage of common separated by each of the functions (Tab. 12). The first function constituted 76.3% of the explained variable (76.3% of the total discriminatory strength) and, thus, was recognized as the most important one. The second function constituted only 23.7% of the discriminatory strength. In the first root (function), the most significant strength of discrimination was shown by loads realized in the fourth area of intensity (T_4), whereas a slightly lower strength was observed for the special training loads realized in the third (S_3) and fifth area of intensity (S_5). These loads were found to affect, to the greatest extent, the achievement of high scores in race walk of women.

A factor determining success (a high sports level) in the race walk that was the most strongly correlated with the discriminatory function turned out to be loads performed in the fourth area of intensity (T_4). This is indicated by a high value of a structural coefficient (Tab. 13.). The structural coefficient of the first function may be referred to as a discriminatory function being under the influence of T_4.

Tab. 12. Coefficients of discriminatory functions – for training loads of advanced women race walkers in a one-year training cycle.

Discriminatory variable	Function 1		Function 2	
	Crude	Standardized	Crude	Standardized
T4	0.000175	1.051	0.00001	0.089
S3	0.000054	0.888	0.00002	0.247
S5	0.000100	0.401	0.00022	0.895
Own value	0.799		0.248	
Per cent of variation	76.3%		23.7%	

Tab.13. Structural coefficients for training loads of advanced women race walkers in a one-year training cycle ($p < 0.05$).

Variable	Structural coefficient of the first function	Structural coefficient of the second function
T4	0.646	0.092
S3	0.346	0.541
S5	0.030	0.957

Summary and conclusions

The value of overall training loads (TR) is not the only determinant of accomplishing record-breaking results. An increase in the sports level of a women performer is not directly linked with the training volume itself, but is determined by effects of an integrated system of stimuli leading to a long-standing endurance adaptation, in conformity with motor and functional characteristics of an event (Baj-Korpak 2008).

In summary, it may be concluded that in differentiation of extreme sports levels (I vs. III) significant turned out to be the loads realized in the fourth area of energetic transformations (T_4), directed (D) loads and versatile loads performed in the fourth area of intensity (V_4). The study showed that training of the sportswomen of the highest classification, as compared to that of the sportswomen from group I, was characterized by low values of those loads. It indicates that the examined women athletes representing the

highest sports level were restricting the use of strength and running means. In their case, the higher S_3 values were also found to exert a positive effect on high scores achieved in race walk – they differentiated groups I and III as well as groups II and III. The sports women representing the lowest and the highest sports level, as compared to those from group II, performed a greater special training in the fifth area of intensity (S_5) – those loads turned out to be a factor differentiating levels I and II and levels II and III.

The conducted discrimination analysis proved that the parameters differentiating particular sports level were, simultaneously, determining them (Tab. 13). The predominating factor turned out to be the loads realized in the area of anaerobic-lactate transformations (T_4).

Abstract

The objective of the reported study was a trial of selecting factors that differentiate and, simultaneously, determine a sports level of women specializing in race walking.

The study covered 35 one-year training macrocycles. The material collected was divided into three blocks.

The study was conducted with the method of recording, gathering and analysis of training loads worked out at the Department of the Theory of Sports, Academy of Physical Education in Warsaw. Use was also made of the classification of training means groups for the event of race walking elaborated by Krzysztof Perkowski, with own modification.

Differences in training loads between three groups of sportswomen were evaluated with the use of a one-way analysis of variance (a parametric test ANOVA), and the Kruskal-Wallis test (a non-parametric test). Once the result was significant ($p < 0.05$), the differences between groups were evaluated with the Tukey (RIR) test (for parametric tests) or with the multiple comparison test (for the Kruskal-Wallis test).

Loads that significantly differentiated the training of sportswomen at various levels of advancement turned out to be efforts realized in the fourth area of energetic transformations (T_4), directed loads (D) as well as versatile loads realized in the fourth area of intensity (V_4). The achievement of high scores is facilitated by reduction of those loads and by increasing the special loads realized in the fourth area of energetic transformations (S_3), the effect of which appeared to be statistically significant. Another factor differentiating the levels of sports advancement turned out be the special loads realized in the fifth area of intensity (S_5).

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EVALUATION OF RESIDENTIAL SAFETY BASED ON A SURVEY OF RESIDENTS OF BIAŁA PODLASKA COUNTY

Key words: sense of safety, Biała Podlaska county

Introduction

Both from the individual and the group perspective, a sense of safety is crucial for the personal growth of individuals and the development of entire communities. Crime statistic are analyzed, and the subjective impressions of community members residing in a given region are surveyed. A sense of safety is determined by a number of factors. In the micro-social dimension, it is affected by an individual's personal experience, temperament, personality traits, upbringing, education, peer pressure, work environment and other variables which are difficult to measure in a scientific approach (such as the respondent's emotional state when assessing a given situation). From the macro-social point of view, a sense of safety is influenced by cultural values, the region's geographic location, level of development, the legal system in force and, above all, the operations of central and local authorities. Those factors undergo continuous change due to the dynamic growth and transformations of contemporary societies.

A consortium of three public opinion research centers (CBOS, DGA PBS and TNS OBOP) was commissioned by the Police Headquarters to carry out a survey of residential safety among Polish citizens in January 2007 and January 2008. A total of 17000 respondents older than 15 were surveyed. The results of the survey clearly indicate that Poles have a growing sense of personal safety. The researchers developed a map of voivodships whose residents were not afraid to venture into selected areas and streets in their place of residence after dark. This opinion was expressed by 69.3% respondents in Lubelskie voivodship, around 65% in Mazowieckie voivodship and 70% in Podlaskie voivodship. The residents of Lubelskie voivodship demonstrated an above-average level of satisfaction with the work of the police. In the 2008 survey, the residents of Lubelskie voivodship felt safer in comparison with the results of the 2007 study. Survey questions served as a basis for identifying the problems discussed in this paper.

This study evaluates the subjective sense of safety communicated by the residents of Biała Podlaska county. This was the second survey carried out in joint effort with the Sociology Institute of the Pope John Paul II School of Higher Vocational Education in Biała Podlaska and the Police Office in Biała Podlaska. This paper discusses only selected fragments of the poll carried out in 2008.

Methods and respondent characteristics

The objective of the study was to survey the opinions of Biała Podlaska county residents regarding their perceived level of safety in the place of residence.

In reference to a national survey investigating Polish citizens' sense of safety, this study addressed the following problems:

What is the respondents' subjective sense of safety?

Do the residents of Biała Podlaska county feel safe when they leave their homes after dark?

What locations are considered dangerous and are avoided by the residents of Biała Podlaska county?

The diagnostic poll method involving questionnaire interviews was used. The questionnaire was the principal research tool. Research methods were developed in collaboration with the Police Office in Biała Podlaska.

The study group was a representative sample of 1097 residents of Biała Podlaska county. The survey was carried out at the turn of May and June 2008 with the involvement of Sociology Faculty students of the Pope John Paul II School of Higher Vocational Education in Biała Podlaska

The number of towns, municipalities and village administration units was selected in such a way as to adequately represent the structure of the county. The respondents from each town and village were selected subject to availability (the sample was structured in view of respondent availability).

The number of respondents in each town, municipality and village was set proportionally to the total population of a given administrative unit.

Tab. 1. Detailed list of the respondents' place of residence.

Place of residence	Number od respondents	%
Biała Podlaska	42	3.8
Drelów	49	4.5
Konstantynów	40	3.6
Leśna Podlaska	48	4.4
Łomazy	43	3.9
Międzyrzec Podlaski	45	4.1
Piszczac	51	4.6
Rokitno	34	3.1
Rossosz	24	2.2
Sławatycze	24	2.2
Sosnówka	24	2.2
Terespol	57	5.2
Tuczna	35	3.2
Wisznice	48	4.4
Zalesie	37	3.4
Międzyrzec Podlaski	118	10.8
Terespol	45	4.1
Ogółem	1097	100
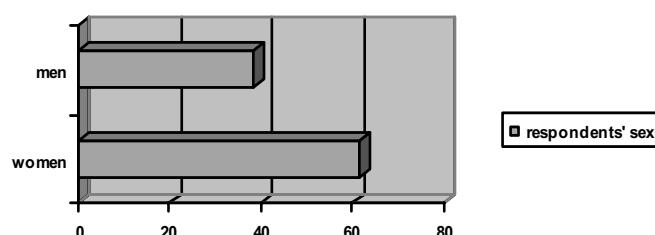
Fig. 1. Respondents' sex.

As indicated by Fig. 1, women accounted for 61,6% (665) and men for 38,4% (408) of the respondent group.

Tab. 2. Place of residence.

Place or residence	Number of respondents	%
Urban	415	37.8
Rural	682	62.2

The structure of the place of residence is the second variable analyzed in this report. In the discussed survey, respondents residing in rural areas outnumbered the polled subjects from urban areas. City and town dwellers

accounted for 37,8% of the surveyed population, while the remaining respondents were rural residents. The above statistics reflect the actual residential structure of Biała Podlaska county.

Analysis of survey results

A sense of safety is one of the most important factors determining an individual's living standards, therefore, the respondents' subjective sense of safety in the place of residence was one of the first aspects investigated by the survey.

Tab. 3. Respondents' perception of residential safety.

Response	Number of respondents	%
Safe	365	33.3
Rather safe	499	45.5
Rather unsafe	106	9.7
Unsafe	75	6.8
Difficult to say	52	4.7
Total	1097	100
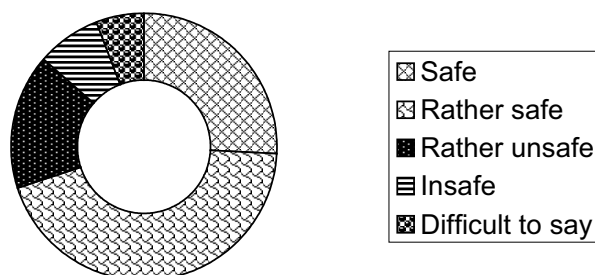
Fig. 2. Respondents' perception of residential safety in%.

The majority of respondents (78,8% of „safe" and „rather safe" indications) feel safe in their place of residence. This is a highly satisfactory result. The largest group of polled subjects (45,5%) were of the opinion that their place of residence was rather safe, followed by 33,3% respondents who felt completely safe. Around 10% of answerers stated that their place of resident was rather unsafe, while only 6.8% felt definitely unsafe. 4,7% respondents could not formulate an opinion on the matter.

Tab. 4. Sense of safety and the place of residence %.

Sense of safety/place of residence	urban	rural
Safe	24.8	38.5
Rather safe	44.8	46.0
Rather unsafe	15.4	6.2
Unsafe	10.4	4.7
Difficult to say	4.6	4.7

There are no statistically significant differences between the place of residence and the perceived degree of safety in the place of residence, but rural dwellers were slightly more likely to have a greater feeling of security. Human relations in a rural community are marked by a lower degree of anonymity and lower crime rates than in urban areas. The above could have influenced the perception of safety among the residents of Biała Podlaska county.

A sense of safety is crucial in certain situations, such as the decision to venture outside one's home after dark. The respondents were faced with a hypothetical scenario in which they had to take a stroll in their place of residence after dark. They were then asked to indicate their perceived sense of safety.
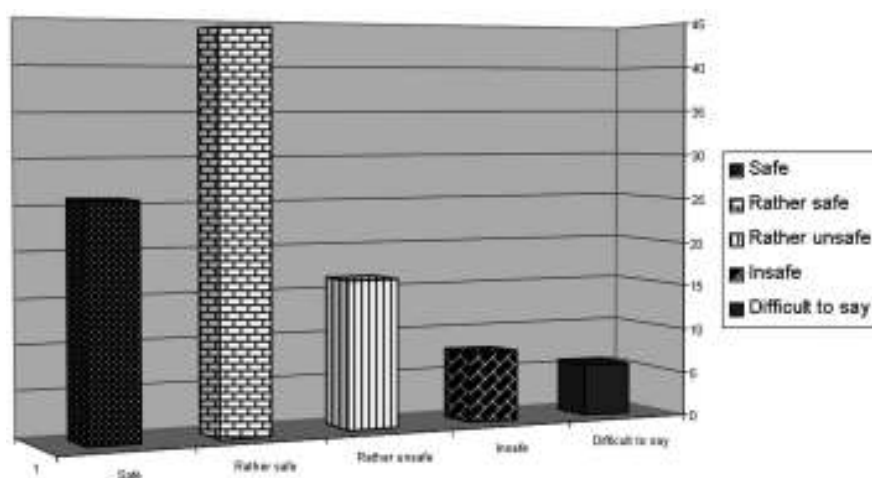
Fig. 3. The respondents' sense of safety when strolling in the place of residence after dark in%.

Tab. 5. The respondents' sense of safety when strolling in the place of residence after dark.

Response	Number of respondents	%
Safe	283	25.8
Rather safe	484	44.1
Rather unsafe	181	16.5
Unsafe	85	7.8
Difficult to say	64	5.8
Total	**1097**	**100.0**

Every fourth inhabitant of Biała Podlaska county feels safe when strolling in the place of residence after dark. The largest group of respondents (44,1%) were of the opinion that their place of residence was rather safe for taking a stroll after dark. When both of the above categories are combined, the survey produces a highly optimistic result of around 70% respondents who are not afraid to stroll in their place of residence after dark.

A different view was expressed by 24,3% of the polled subject who claimed that their place of residence was unsafe after dark. Only 5,8% of the dwellers of Biała Podlaska county failed to answer this question.

Tab. 6. Number of respondents avoiding selected locations and streets.

Response	Number of respondents	%
Avoids them	745	68.0
Does not avoid them	352	32.0
Total	1097	100
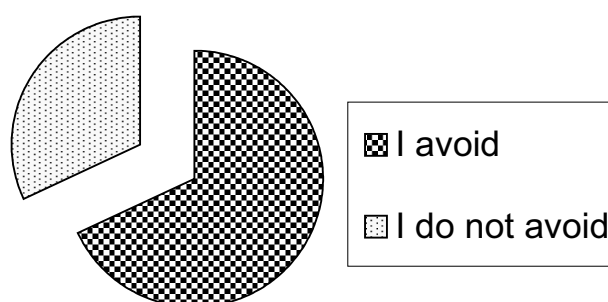
Fig. 4. Number of respondents avoiding selected locations and streets in %.

The majority of Biała Podlaska county residents do not avoid any specific locations and feel safe when strolling in their place of residence after dark. This opinion was voiced by 68.8% polled subjects. Every third surveyed resident of Biała Podlaska county claimed to avoid certain locations, streets or people in fear for their safety.

Tab. 7. The most dangerous locations in the place of residence in the respondents' opinions.

No.	Location	Number of respondents
1	Night clubs, discos and the vicinity	302
2	Public transport stops	152
3	Railway and coach stations	290
4	Means of public transport	45
5	Parks	369
6	Shopping centers	22
7	Markets	44
8	Shops selling alcohol and the vicinity	199
9	Stadiums	56
10	Quiet streets	258
11	Main streets	37
12	Selected districts in the region	23
13	Other locations	25
14	All locations in the region are safe	242
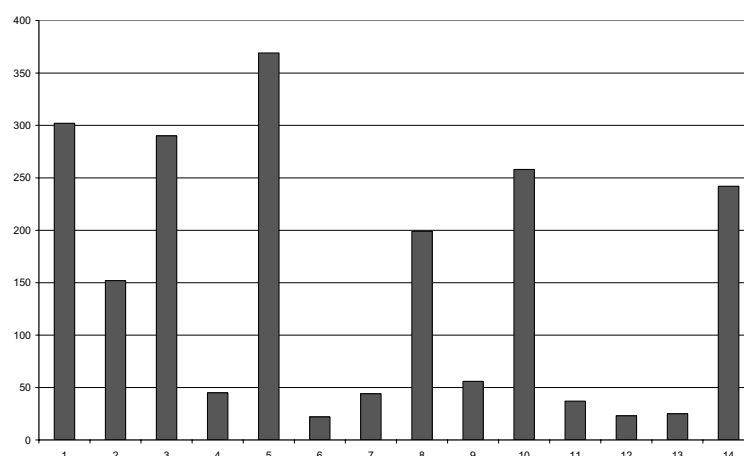
Fig. 5. The most dangerous locations in the place of residence in the respondents' opinion.

Legend:
1 – Night clubs, discos and the vicinity, 2 – Public transport stops, 3 – Railway and coach stations, 4 – Means of public transport, 5 – Parks, 6 – Shopping centers, 7 – Markets, 8 – Shops selling alcohol and the vicinity, 9 – Stadiums, 10 – Quiet streets, 11 – Main streets, 12 – Selected districts in the region, 13 – Other locations, 14 – All locations in the region are safe.

]In the opinion of the largest group of respondents, parks are the most dangerous location in their place of residence. According to both urban and rural respondents, parks are followed by night clubs, discos and the vicinity, railway and coach stations as well as main streets.

Conclusions

The vast majority of Biała Podlaska county residents (78.8%) feel safe in their place of residence, of which one-third feel definitely safe. Most answerers in the polled group are not afraid to stroll in their place of residence after dark.

In the respondents' opinion, the most dangerous locations in their place of residence are parks, followed by night clubs, discos and the vicinity, railway and coach stations. No significant differences in the sense of safety were observed between male and female respondents. As regards the residential criterion, rural dwellers' perception of safety was 15% higher than that of rural area residents.

The discussed survey is identical to the poll involving a national sample, and the results of both studies closely coincide. On average, more than 70% of Poles feel safe in their place of residence after dark, and 62% of respondents are satisfied with the work of the police in their general area of residence. The study offers some interesting insights into the quality of neighborhood relations in an urban environment. Human relations in rural areas are still more intense and less anonymous than in urban areas. The above could explain the greater sense of safety among rural responders.

According to father Stanisław Kowalczyk, a community is a manifestation of the common good. Kowalczyk cites J. Messner and defines communal good as help offered to another human being through shared effort of all community members (Kowalczyk 1996). The police are an institution that should further the attainment of the common good by serving the local community. A high sense of security shared by the residents of Biała Podlaska county suggests that the police of Biała Podlaska county effectively implement the principle of the common good through their service to the local community.

Abstract

The paper presents the results of a study on Biała Podlaska county residents' perceived sense of safety in their place of residence. The survey, carried out in 2008, covered 1097 respondents, both men and women, residents of rural and urban areas in Biała Podlaska county. The results of the survey suggest that the majority of dwellers of Biała Podlaska county feel safe in their place of residence.

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OVERCOMING EDUCATIONAL DIFFICULTIES AT CLASSES OF PHYSICAL EDUCATION IN THE OPINION OF TEACHERS, PEDAGOGUES AND HEADMASTERS OF JUNIOR HIGH SCHOOLS

Key words: overcoming educational difficulties, classes of physical education, junior high school, teachers

Introduction

A junior high school is the school bearing the greatest burden of an educational reform and, simultaneously, the most difficult stage of education. Adolescents at the age of 13-15 are undergoing the most complicated developmental stage, which requires not only knowledge and skills but also heart and engagement as well as patience and wisdom from junior high school teachers (MEN 1999).

The Ministry of National Education has assumed that special prophylactic programmes, cooperation with parents and help to children with pedagogical difficulties implemented in junior high schools would diminish the level of aggression and violence amongst the adolescents. Constantly appearing news, observations of behaviors of adolescents and an analysis of investigations addressing that problem prove the continuous escalation of that phenomenon (Bergier, Gajewska-Moś 2007).

Pedagogical difficulties usually refer to behaviors of children and adolescents that are inconsistent with social standards, hinder co-existence and cannot be affected by common pedagogical treatments. Most frequently, they are evoked by unfavorable life conditions and improper upbringing, with simultaneously a correct intellectual development of an individual (Bergier, Gajewska-Moś 2008).

Overcoming upbringing difficulties is an extremely complex and long-term process, therefore it should not be brought only and solely to some educational techniques. It is necessary to elaborate a specific system of upbringing effects, which on the one hand would consider the needs of difficult pupils, and on the other – would also be functioning well in the overall sy-

stem of upbringing and learning (Łobocki 1987). Usually, the overcoming of upbringing difficulties proceeds in three dimensions:

- prophylactic – that includes both global pedagogical effects, organized within the overall system of upbringing and learning, as well as individual work with a child posing educational difficulties;
- diagnostic – that determines the type of educational difficulties and searches for their causes;
- therapeutic – which counteracts the difficulties through the selection and application of the most effective means (Dąbrowska, Wojciechowska-Charlak 1996).

According to pedagogues, educational work with pupils that pose difficulties involves help in learning, development of skills and interests, and restriction of free time.

H. Izdebska (1988) believes that of undisputed significance to the proper development of each child is the development of skills and interests. Early developed and extended interests stimulate the development of children and enrich their personality. A lack of positive interests depletes personality, poses threat to a psychical balance, and happens to be a source of development of undesirable attitudes. It is therefore worth to utilize the work of various hobby clubs and after-school activities, corresponding to active interests and needs of pupils, that may become an important therapeutic and prophylactic agent.

An excellent pedagogue – A. Kamiński (1985) claimed that, unlike in the case of adults, the free time of children should be restricted and filled with contents desirable from the pedagogical point of view. He recommended organizing various forms of sports and tourist activities. Joint preparation of such events affords an opportunity for active involvement of also "difficult" children, creates also multiple occasions for their activation as well as teaches rational methods of planning and organization.

In a complex and often long-standing process of overcoming upbringing difficulties, a tutor should examine each case individually and should follow some general methodological guidelines, including among others:

- grading the difficulties – starting from what is close, known and easy to a child, and then going into more complex issues;
- inducing proper motivation – the application of positive reinforcements;
- individualization – based on the one hand on the in-depth knowledge on child development; and on the other – on adjusting requirements and the pace of work to child's capabilities;
- application of methods of practical teaching to less gifted children;

– skillful utilization of therapeutic methods (play, sport, useful work) (Dąbrowska, Wojciechowska-Charlak 1996).

All these actions will yield the desired effect on condition that the teacher – pedagogue is well prepared, has mature personality and is qualified from the psychopedagogical perspective. In this case, the maturity means most of all the capability of pedagogues to understand their pupils. A pedagogue is someone who understands a pupil and is able to patiently accompany him in his development, with simultaneous resolution and sense of realism. A significant test of the maturity of a pedagogue is the capability of defending the pupil against his own weakness and immaturity. M. Dziewiecki (2002) believes that a qualified pedagogue knows perfectly subjective strategies of pupils thinking of themselves. He is additionally aware that his pupils are becoming increasingly better in understanding the surrounding world, but far worse in understanding themselves. They can use the freedom so naively that they eventually lose it. To some extent, each pupil is therefore a threat to himself. In addition, he usually adopts more easily the negative than the positive models of behavior noticed in his environment. In such a situation, a mature pedagogue utilizes each contact with a pupil and each school class in order to enable the pupil increasingly realistic comprehension of himself and the world.

Under conditions of school work, the pedagogical work with difficult pupils does not exclude the need of actions in the area of individual or group (outside the class) contacts with them. They may be held in the form of psychotherapeutic meetings or the so-called techniques of behavioral therapy, organized by experienced psychologists or specially-trained pedagogues.

According to some psychologists, the behavioral therapy techniques are more effective than the psychotherapeutic methods. They consists in systematic manipulation of some components of the surrounding environment, the patient is being in. They may be applied both under clinical conditions as well as in the natural environment of a child, *e.g.* at school or at home. Amongst the most commonly applied techniques of behavioral therapy, M. Łobocki (1987) enumerates:

– desensitization techniques, in the case of fear (phobia) therapy, which consist in the application of first a stimulus inducing minor anxiety states, accompanied by the sensations of relaxation and pleasure evoked in a child, and then the application of stronger and stronger fear stimulus which, when introduced gradually no longer makes a great impression on a child; this technique is used in overcoming children's fears of animals, water, school;

– imitation techniques which consist in allowing a patient to observe persons who do not feel fear nor fright in situation very frightening to

him; a specified behavior may be altered or modeled by means of exposure of some standard – a role model (a story, a movie or a situation from an everyday life).

The above-mentioned techniques of behavioral therapy are based on the so-called "positive reinforcement", sometimes manifested in the form of specific rewards or more often social appreciation. In that case, a just assumption is made that the rewarded and socially-approved behaviors manifest a greater tendency to be repeated, than the behaviors bearing negative consequences. It should be remembered, however, that not all educational influences will reach the desired goal. Usually, in studies into the effectiveness of overcoming educational difficulties, the improvement is observed in not more than 2/3 of children subjected to therapeutic and pedagogical treatments (Łobocki 1987). In turn, a number of disorders in the behavior of children disappear irrecoverably, in a somehow self-induced manner, without any purposeful or aware pedagogical intervention. Nevertheless, one cannot count on such a coincidence, unless it refers to some disorders typical of some developmental phases. Of outmost significance is also to capture the escalating process of social misadaptation in time. By responding to the appearing educational difficulties in the appropriate time, a pedagogue may spare many disappointments and distress to both pupils and himself. According to a renowned Polish pedagogue: "the greatest harm that may be done to difficult children is to kill their faith that the good hidden inside them may and will eventually triumph" (Grzegorzewska 1964 s.98).

According to Z. Stępień (2001), teachers of physical education to a greater extent than teachers of other subjects may effectively cope with educational difficulties. A leading method is the preparation of interesting, non-stereotypical lessons, with the use of original accessories and organizational solutions, engaging the whole group of exercising pupils.

K. Kasperska (1998) believes that the best way leading to the engagement of adolescents in the classes of physical education is:
- increasing the attractiveness of classes, avoidance of schematic solutions;
- adjusting classes to needs and interests of pupils;
- searching for new and frequently changing forms of motor activities;
- diversifying exercises by the application of a high number of colorful accessories (small balls, colorful tapes, stoles, scarves, skipping-ropes, ring-plays, ribbons);
- engaging pupils in the conductance of fragments of classes by themselves.
- In order to increase the activity of pupils at classes, each lesson should be preceded by the explanation of its objective and an appropriate se-

lection of exercises. In the case of girls, the classes should be more feminine in character, which may be achieved through:

– introduction of more dance- and music-oriented exercises;
– application of up to day forms of motor activities, including: elements of modern dance, jazz-gymnastics, aerobic and Callanetics;
– diversification of exercises with various dancing steps and jumps, fragments of folk dance and ballroom dancing.

Engaging the girls into such type of classes consists in encouraging them to search and demonstrate interesting forms of motion at those classes as well as in encouraging them for motion improvisation and realization of own ideas in mini dancing programmes.

A pupil should be evaluated objectively for the attitude and achievements as well as rewarded with appraisals and diplomas for active participation in classes, sports competitions or school shows.

According to M. Barlak (1998), physical education in a reformed school constitutes a specific type of "prophylaxis", by undertaking actions of physical education the school protects a young pupil against a variety of social pathologies, including: drugs, alcohol, tobacco, gangs, and subculture groups. That author stated that the warning of a priest Jan Bosko: "dead field – live devil; live filed – dead devil" should still be valid in education.

John Paul II (2001) in his deliberations over the face of sport called it the most educating domain that enables the exercise of attention and will, the development of persistence, responsibility for oneself and the others, as well as bearing hardships and inconveniences.

Objective of the study and research problems

The major objective of the study was the identification of means of preventing educational difficulties occurring at classes of physical education and of overcoming them by teachers of physical education, school headmasters and school pedagogues working in junior high schools of the city of Zamość.

Research problems:

1. Educational methods and means of imposing discipline on pupils used during a class of physical education.
2. Adjustment of plans of didactic and upbringing work to interests of pupils, and means of motivating them to participate in little attractive classes.
3. Effect of sports-talented youth on the group and the course of classes.
4. Difficult educational cases and solutions to them.
5. Prophylactic and educational actions undertaken at school.

Material and method

The study conducted in the year 2005 was carried out with the method of a diagnostic survey, with a questionnaire being the main research technique. The questionnaire survey was conducted amongst 53 teachers of physical education (26 women and 27 men) working in seven junior high schools located in the city of Zamość. Their job seniority was diversified. Eight of them (15,1%) have been working for less than two years, and ten of them (18,9%) for more than twenty years. The most numerous groups were those of teachers with seniority of two to ten years (46,2% of women and 44,4% of men). After the recognition of the job seniority declared by the respondents, due to relatively low sizes of the extreme groups (less than 2 years and more than 20 years), the following distinction was adopted in the study: "seniority up to 10 years" (60,4%), and "seniority over 10 years" (39,6%). The questionnaire survey was completed by interviews conducted with six school headmasters and seven pedagogues working at those schools.

Results

Educational challenges are imposing new requirements onto teachers and, simultaneously, hold them responsible for educational effects. Today, the most desirable are those teachers who in their everyday life are driven by universal values, are wise, qualified, professional, devoted to adolescents, open to their needs and lifestyles, as well as critical and responsible for their own actions. What were the results of the survey, then?

The collection of answers provided to an open question referring to educational methods applied by the respondents on their classes was assumed to provide data on the methods of preventing educational difficulties and on the knowledge of professional methodological literature by the teachers. Since 22,6% of the respondents did not answer that question, it may be speculated that recalling appropriate methodological terms at the moment of filling up the questionnaire posed a problem to a considerable part of the teachers. In the presented collection of data, we have tried to meticulously retain language of the respondents.

Tab. 1. Educational methods applied at a class of physical education.

Methods	Women		Men		Total	
	N	%	N	%	N	%
Lack of answer	5	19.2	7	25.9	12	22,6
The use of rewards and punishments	13	50.0	9	33.3	22	41.5
Methods of a personal effect of a teacher – expressing disapproval or approval – a personalized example	11	42.3	8	29.6	19	35.8
Assigning functions and roles to participants of classes	5	19.2	2	7.4	7	13.2
The use of play-like forms of classes	3	11.5	1	3.7	4	7.5
Conducting educational talks – making children aware of the consequences of their behavior	1	3.8	2	7.4	3	5.7
Referring to positive role models – *e.g.* famous sportsmen	1	3.8	-	-	1	1.9
Teaching self-assessment and development of self-esteem in participants of classes		-	1	3.7	1	1.9

Data presented in Tab. 1 show that 41.5% of the respondents prefer the method of "the system of rewards and punishment", whereas 35.8% – the method of personal effect, and 13.2% the method of "assigning functions and roles to participants of classes". The other "methods" presented above and corresponding loosely to the methodological literature were indicated less frequently.

It is recommended that a teacher of physical education considers interests of adolescents as a hint in elaborating own work plan. This, however, does not necessarily work in the school reality. When asked if they adjust the program of physical education to interests of the pupils, the respondents provided diversified answers (Fig. 1).
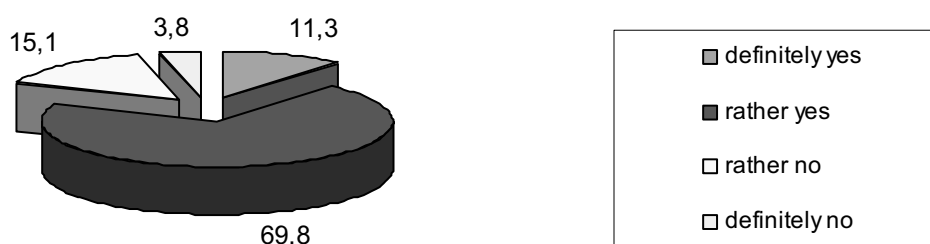

Fig. 1. Adjusting educational programme to interests of pupils.

A small group of the teachers (11.3%) is definitely convinced about the need of adjusting educational programmes to interests of the adolescents. In turn, 69.8% of the respondents were rather adjusting their programmes, and

15.1% of the teachers were rather not adjusting their programmes to the needs of the pupils. There are also some answers pointing to the fact that some of the teachers (3.8%) definitely do not adjust the educational programme to the interests of the pupils. While substantiating the answer "definitely no", one of the respondents explained that: "sports sections are supposed to deal with pupils' interests, and the programme is a programme".

The question about imposing discipline on pupils at classes of physical education (an open question) remained unanswered by 15.1% of the respondents, which constitutes a considerable percentage of the surveyed group of teachers. Perhaps the reason of evading the answer to it was the open construct of the question. One of the teachers stated that he did not feel the need of imposing discipline on his pupils, whereas the others exemplified actions undertaken in this respect, which were summarized in Tab. 2.

Tab. 2. Methods of imposing discipline on pupils.

Methods of imposing discipline indicated by teachers	Women		Men		Total	
	N	%	N	%	N	%
Lack of answer	3	11.5	5	18.5	8	15.1
No need for imposing discipline	-	-	1	3.7	1	1.9
A talk with a pupil, persuasion	8	30.8	8	29.6	16	30.2
Additional portion of exercises, strain	8	30.8	6	22.2	14	26.4
Admonition, reprimand	8	30.8	2	7.4	10	18.9
Negative mark	4	15.4	4	14.8	8	15.1
Complaint to authorities (class tutor, parents, school headmaster, school pedagogue)	1	3.8	5	18.5	6	11.3
More extensive introduction of elements of drill to classes	2	7.7	3	11.1	5	9.4
A change of the form of classes	2	7.7	-	-	2	3.8
Raising voice	-	-	1	3.7	1	1.9
Expelling undisciplined pupils from classes	-	-	1	3.7	1	1.9

In most cases, the methods of imposing discipline on pupils applied by the teachers surveyed are based on a talk and persuasion (30.2%), however already the second means mentioned is "enforcing" in character and involves the administration of additional exercise to pupils (26.4%). In the rank of those means, the successive places are occupied by: giving admonition, reprimand (18.9%), giving a negative mark (15.1%) and making a complaint to other persons significant to a pupil (11.3%). Nearly every tenth teacher (9.4%) believes that a good method of imposing discipline on pupils is a wider application of elements of drill (briefing at different locations, reporting *etc.*). Two female teachers were trying to impose discipline on their pupils by changing the form of classes, and single answers of teachers (men)

indicate such means as raising voice or expelling the undisciplined pupils from classes.

Taking into account that a teacher of physical education cannot solely flatter the tastes of the adolescents and is obliged to accomplish the programme minimum, which is not always convenient to the participants of classes, the teachers were asked the following question: „How do you motivate adolescents for active participation in little attractive classes?". The construct of the question suggested some answers, did not restrict the number of methods selected and provided an opportunity to add another form of motivating pupils not considered in the question (Tab. 3).

Tab. 3. Methods of motivating pupils to participate in little attractive classes.

Methods of motivating	Women		Men		Total	
	N	%	N	%	N	%
Convincing	11	42.3	16	59.3	27	49.1
Encouraging with a good mark	9	34.6	7	25.9	16	30.2
Negotiating (something for something)	3	11.5	3	11.1	6	11.3
Such problems do not occur	6	23.1	3	11.1	9	17.0
It does not bother me – I am doing my job	2	7.7	2	7.4	4	7.5
Using constraint (credit with mark)	-	-	3	11.1	3	5.7
Motivating through personal example	-	-	1	3.7	1	1.9

The analysis of answers indicates that six of the respondents are using more than one method, and that one teacher (a man) did not answer that question. Nine of the respondents (17.0%) claimed that they did not have such problems with pupils and another four (7.5%) that they were not paying attention to it and were doing their jobs.

The survey shows that 39 teachers (74.6%) feel the need of motivating their pupils for active participation in little attractive classes and are trying to achieve that by means of: convincing (49.1%), encouraging with a good mark (30,2%), negotiating (something for something) (11.3%), using constraint by crediting with a mark (5.7%) and by a personal example (1.9%). By noticing and respectively rewarding the sports-talented youth, the teachers are indirectly affecting the improvement of discipline at their classes (Tab. 4).

Tab. 4. Effect of sports-talented adolescents on the group during classes.

Type of answer	Women				Men				Total of all teachers	
	Seniority of up to 10 years	Seniority over 10 years	Total N	%	Seniority of up to 10 years	Seniority over 10 years	Total N	%	N	%
They definitely have an effect	6	5	11	42.3	8	4	12	44.4	23	43.4
They rather have an effect	8	3	11	42.3	8	3	11	40.7	22	41.5
Total – they have an effect	14	8	22	84.6	16	7	23	85.1	45	84.9
They rather do not have an effect	2	2	4	15.4	-	4	4	14.8	8	15.1
They definitely do not have an effect	-	-	-	-	-	-	-	-	-	-
Total – they do not have an effect	2	2	4	15.4	-	4	4	14.8	8	15.1

The occurrence of such an effect is noticed by 84.9% of the respondents, whereas its lack – by little as 15.1% of the teachers surveyed. Amongst the teachers who notice that effect, 43.4% of the respondents determine it as "definite". It seems that the teachers who do not notice that effect are not really convinced on the soundness of their observation, Since they were choosing the answer "they rather do not have an effect".

All teachers who declared the impact of the sports-talented adolescents on the group of exercising pupils believe that the effect is linked with measurable benefits in the course of the classes (Tab. 5).

Tab. 5. Effect of sports-talented adolescents on the course of classes.

Effects indicated by teachers	Women		Men		Total	
	N	%	N	%	N	%
They have a positive impact by setting good examples, mobilizing and motivating other pupils	13	50.0	14	51.9	27	50.9
They increase the activity of other pupils at the classes, affect an appropriate pace of the classes, and increase a sports level of the group	4	15.4	4	14.8	8	15.1
They play a leading role at the classes, they are an authority to the other exercising pupils	5	19.2	2	7.4	7	13.2
They help the teacher demonstrate new exercises, they are the point of reference	1	3.8	2	7.4	3	5.7
They encourage other pupils to participate in after-school sports activities and to practice a specified sports discipline	2	7.7	1	3.7	3	5.7

The teachers declaring the occurrence of the effect of sports-talented adolescents on the course of the classes of physical education enumerated the following manifestations of that effect: the sports-talented adolescents are setting good examples, mobilizing and motivating other pupils to effort (50.9%), they increase the activity of other pupils at the classes by affecting an appropriate pace of the classes, and increase a sports level of the group (15.1%), they play a leading role at the classes, they are an authority to the other exercising pupils (13.2%), they help the teacher demonstrate new exercises, they are the point of reference (5.7%), and finally they encourage other pupils to participate in after-school sports activities and to practice a specified sports discipline (5.7%).

They teachers turned out to be rather reluctant when asked to describe any of more difficult educational cases. As a result, only thirteen descriptions of more difficult cases and methods of their solution were obtained in the survey (Tab. 6). Perhaps, the open character of the question and the need of convincing reconstruction of the event along with the method of its solution caused that as many as 75.4% of the respondents evaded that task. It is also likely that an everyday life of each school is so rich in various events, that even memorized cases lose their status of "a more difficult case".

We have tried to present the descriptions obtained from the respondents in as little modified form as possible (nevertheless some stylistic modifications turned out to be necessary) and to group them according to reasons that evoked the specified "more difficult case".

The descriptions made by the respondents indicate that educationally difficult cases do occur at school, since those cases are either typical to adolescents at this stage of development, or result from various pathologies occurring at school or from the fact that the school itself cannot always "rises to the educational challenges".

The above-presented descriptions of more difficult cases signalize also solutions to them. In some of the cases, the problem was solved by decisions of the teacher, yet in most of the cases described, the problem seemed to be beyond competences of the teacher, who was handling the case over to a school pedagogue or to a school headmaster, or was seeking help in parents of a pupil.

Resorting to the educational help of significant persons in actions undertaken in respect of disobedient pupils is illustrated by compilation of data referring to the frequency of applying "sending to" or "calling for" solutions by a teacher (Figs. 2, 3, 4).

Tab. 6. Descriptions of more difficult educational cases and methods adopted by teachers of physical education to solve them.

Case category	Case description
Cases depicting difficulties that result from the puberty period of adolescents; acceptance of own appearance and interpersonal relationships in the group.	„A girl (III class of junior high school) did not want to exercise at classes. She was eager to exercise in the first class. Neither persuasion nor threatening with a bad mark helped. After (…) talks, it turned out that she did not accept her appearance which was changing during puberty. I have left the case of a school pedagogue."
	„While dividing the group into teams for the game "dodgeball", none of the teams wanted to have an obese girl in their team. I was convincing the group (…) and, finally, I have assigned the girl to one team. It turned out that the "unwanted" girl was able to stay the longest in the game and was "smashing" opponents the strongest of all players. The whole group was surprised".
	„A disliked pupil, who was teased by the class, turned out to be a good in sprint and long jump. After school competition in athletics and wins recorded by the boy the class has changed the attitude toward him".
Cases depicting difficulties that result from legally-forbidden or socially-unacceptable acts.	„Someone from the group was devastating sports equipment. The class did not want to reveal who was doing it. After intensive, individual talks with a few "suspects", finally - softened - the pointed out the real perpetrators. The guilty pupils suffered the financial consequences and the situation did not happen again."
	„Notorious absence of a pupil (a boy) on classes on physical education and others. Social interview revealed alcoholism in the family. The pupil was put under surveillance of a chief education officer."
	„A pupil (a boy) avoided classes of physical education which he was supposed to change his clothes at. It turned out that he had bruises and sings of being beaten by a parent. I have reported this case to a school pedagogue."
	„During classes at a sports hall, I have noticed that a boy was under the influence of alcohol. I have called his parents."
	„At classes of physical education I have learnt about cases of threatening others by, allegedly, two pupils (boys) from junior high school. I have informed the headmaster and the fact was reported on a police station. In the effect of an explanatory procedure, one of the boys was transferred to another school, whereas charges were not confirmed in the case of the other".
Cases depicting difficulties that result from improper organizational and educational activities of school.	„At classes of physical education, a pupil (a boys) accepted only playing football. He did not recognise any other forms of classes and refused to participate in them. Finally, he has received an unsatisfactory mark for the semester. Numerous talks with boy's parents and with the boy have led to signing a contract (!!?) with the pupil. Finally, he has accepted other forms of activities at classes of physical education."
	„Due to organizational reasons, the III class of junior high school was coupled into one coeducative group for classes of physical education. The boys were unconcerned about that, but the girls were refusing to exercise in such conditions. Especially two girls were very persistent in their resolutions. I have engaged school headmaster and pedagogue in the case, but already my personal example as a woman, instructing and rewarding were slowly bringing some effects and were convincing the girls to active participation in the classes of physical education."
	„The class was behaving terribly. I have asked the headmaster for immediate visitation of the lesson. The atmosphere has been slightly improved"
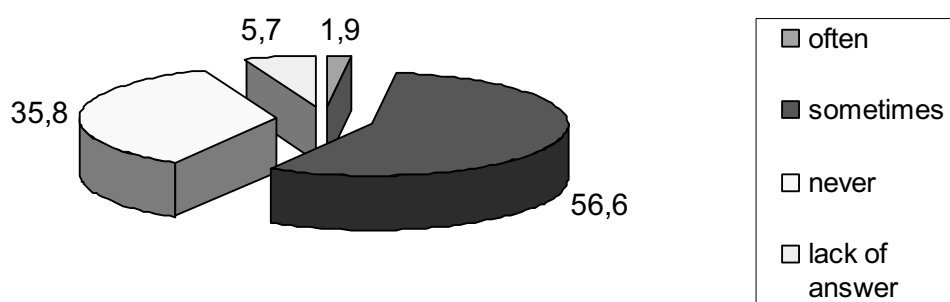
Fig. 2. Sending a disobedient pupil to a school pedagogue.
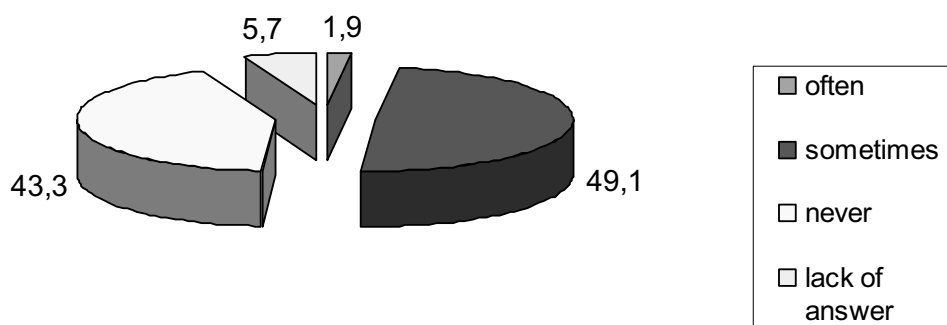
Fig. 3. Sending a disobedient pupil to a school headmaster.
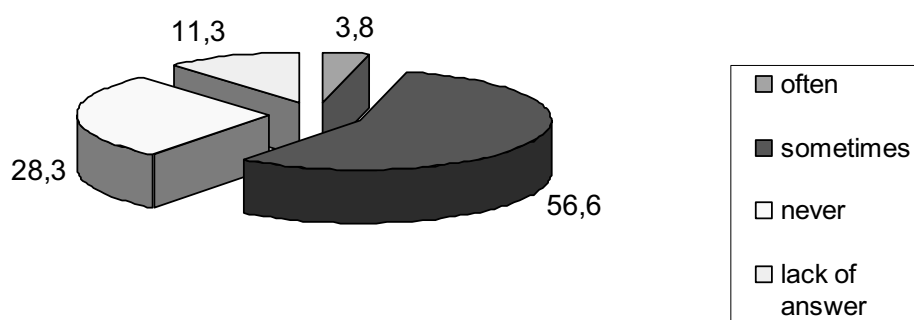
Fig. 4. Calling for parents of a disobedient pupil.

The analysis of data shown in Figs. 2, 3, 4 demonstrates that none of the respondents classifies the frequency of using help of significant persons in imposing discipline on pupil to a category "very often". The „often" use of help of a school pedagogue and headmaster is declared by 1.9% of the respondents, whereas the : often" calling for parents – by 3.8% of the teachers surveyed.

"Often" interventions of a school pedagogue are reported by over half the respondents (55.6%). The same percentage of the surveyed teachers declare the same frequency of calling for parents of a misbehaving pupil. The "often" help of a school headmaster in imposing discipline on disobedient pupils is declared by nearly half the respondents (49.1%).

The number of indicating the answer "never" by the respondents discussed together with indications of the above-mentioned categories ("very often", "often" and "sometimes") enables assuming that when it comes to imposing discipline on pupils, the teachers seek the major allies in parents. Data collected in the table indicate that 28.3% of the respondents "never" call for parents, and that 35.8% of the teachers "never" send pupils to a school pedagogue and 43.4% to a school headmaster.

The observation on choosing parents as the main ally in educational activities is also confirmed by the analysis of data obtained from the collection

of respondents' answers to a question: "Are you a supporter of direct contacts with parents of a difficult pupil?".

Tab. 7. Attitudes of teachers towards direct contact with parents of a difficult pupil.

Should the parents be called for?	Answers of women		Answers of men		Total	
	N	%	N	%	N	%
Definitely yes	16	61.5	10	37.0	26	49.1
Yes – in sporadic cases	10	38.5	15	55.6	25	47.2
No – a remark in a pupil's record book is enough	-	-	-	-	-	-
I have any difficult pupils	-	-	2	7.4	2	3.8

As it results from Tab. 7, 49.1% of the respondents are definite supporters of immediate contacting the parents in all difficult cases, whereas 47.2% of the teachers opt for restricting the contacts only to sporadic cases. None of the teachers surveyed prefers the contact with parents by means of a pupil's record book.

In the interview, the school headmasters and pedagogues were asked a question that referred to undertaking prophylactic and educational actions in their schools (Tab. 8). Owing to the fact that the question concerned issues that category of respondents is especially hold responsible for at school, their answers were very extended and tended (deliberately or not) to boast with own initiatives undertaken in this respect.

Almost all the surveyed (92.3%) reported that a special educational programme was implemented at their schools, some of them were ascribing specific names to the programmes, others were granting them the status of an original author's programme.

The second place in the rank (53.8%) was occupied by activities oriented towards parents of a pupil, *i.e.:* continuous information on the behavior of a pupil and activities aimed at extending the parental knowledge on education. School pedagogues took also the opportunity to mention they own individual work with a difficult pupil (46.2%).

Tab. 8. Prophylactic and educational activities undertaken at school as reported by school headmasters and pedagogues (ordered acc. to the number of indications).

Form of prophylactic and educational activities	N	%
Realization of an educational programme aimed at diagnosing and counteracting threats of addictions and violence, realization of author's original educational programmes „Common road", „To be myself – to live better", „No to playing truant" – tending to strengthen the self-esteem of adolescents and to develop their capability to cope with problems	12	92.3
Contact with parents of pupils with problems – informative and advisory calls – pedagogisation of parents	7	53.8
Compensatory classes with pupils having learning difficulties	6	46.2
Collaboration with environmental institutions linked with law and order – the police, municipal guard, family court, education officers	5	38.5
Collaboration with psycho-pedagogical counseling services	4	30.8
Collaboration with the District Center of Social Care in solving difficult problems linked with living standards of pupil families	3	23.1
Trainings for teachers – the so-called assertiveness training	3	23.1
Promotion of physical and psychical health	2	15.4
Individual talks with pupils posing educational problems	2	15.4
Keeping records, care and surveillance over pupils with didactic problems	1	7.7
Collaboration with the Addiction Therapy Clinic	1	7.7
Consultations in a group of: pedagogue, tutor and school psychologist	1	7.7
Engaging parents into participation in solving educational problems at school	1	7.7
Social (free-of-charge) involvement of teachers in leading hobby clubs, sports sections and an after-school room	1	7.7
Weekend meetings – once a quarter – at the Retreat House of the Franciscan Nuns	1	7.7

Other prophylactic actions undertaken in junior high schools involved different forms of collaboration with local institutions: the police, municipal guard, educational officers and courts (38.5%), as well as with Psycho-Pedagogical Counseling Services (30.8%) and Centres of Social Care (23.1%). An interesting form of prophylactic activities seem also the so-called "assertiveness trainings" (23.1%). The other forms mentioned in the report were indicated sporadically. It may be concluded that the range of prophylactic actions is relatively extensive.

Summary and conclusions

An inseparable part of teacher work are both school successes and failures. What should be done to make the latter as rare as possible, to convince more difficult adolescents to physical education, to win their liking and authority? The analysis of problems addressed in the presented work may, at least in part, answer that question. The analysis of results achieved in the survey enabled formulating the following conclusions:

1. Alarming seems to be fact that a considerable part of the teachers of physical education are facing deficiencies of knowledge on educatio-

nal methods. Nearly every second teacher uses the system of rewards and penalties, every third – a personal example, approval and disapproval, and only a few of the teachers – assigning functions and roles to the participants of classes and making pupils aware of the consequences of their actions.

2. In most cases, the methods of imposing discipline on pupils at classes of physical education used by teachers are based on talk and persuasion. However, there are also cases when teacher are trying to imposing discipline by: additional exercises, drill, reprimands or negative marks. In those cases, alarming seems to be a lack of appropriate capability of doping with that problem and inappropriate selection of educational methods which does not facilitate increasing the motivation of pupils. Inappropriate effects may not only daunt pupils to a teacher or a subject but also evoke aversion to undertaking physical activity.

3. The fact that only a small group of teachers of physical education are convinced about the necessity of adjusting the educational programme to interests of junior high school pupils points to a poor recognition of the needs of adolescents at this state of development and to a lack of faith in virtues and values resulting from programme's internalization.

4. Most often, methods of motivating pupils to little attractive by indispensable classes are restricted to convincing and encouraging with a good mark.

5. The prevailing majority of the teachers of physical education are noticing and utilizing the positive effect of sports-talented adolescents on the course of the classes, since they are first of all an example to others, as well as mobilize and motivate other pupils for exercise.

6. A difficult case and its solution was described only by every fifth teacher. Most often, the examples referred to difficulties resulting from the puberty period, e.g. lack of acceptance of own appearance, interpersonal relationships in a group, whereas others were caused by legally-forbidden or socially-unacceptable acts or were resulting from improper organizational and educational activities of school. A part of the cases described were solved by the teacher himself, but most of the cases were handled by the teacher over to a school pedagogue or school headmaster, or the teacher was asking pupil's parents for help.

7. It is pleasing that almost all teachers of physical education appreciate the significance of contacts with parents of a pupil in difficult cases.

8. The account made by school pedagogues and headmasters indicates that the prophylactic and educational activities undertaken at the surveyed schools include, most of all, various educational programmes which enable diagnosis and counteracting threats resulting from addic-

tion and violence and which tend to the strengthening of self-esteem in the adolescents and their ability to cope with problems. Of significance are also continuous contacts with parents and individual work of school pedagogues with difficult pupils.

Abstract

The major objective of the study was the identification of methods of overcoming educational difficulties occurring at classes of physical education at the stage of jnuor high school education. The study was carried out with the method of a diagnostic survey, with a questionnaire being the main research technique. The questionnaire survey was conducted amongst 53 teachers of physical education working in seven junior high schools located in the city of Zamość The questionnaire survey was completed by interviews conducted with six school headmasters and seven pedagogues working at those schools.

The conducted analysis of results enables concluding that a significant part of the teachers of physical education were tangibly facing shortages of knowledge on the educational methods, and that methods of imposing discipline on pupils during classes of physical education are in most cases based on talk and persuasion.

Only a small group of the surveyed teachers of physical education is convinced about the necessity of adjusting a school programme to interests of the junior high school pupils.

The account made by school pedagogues and headmasters indicates that the prophylactic and educational activities undertaken at the surveyed schools include, most of all, various educational programmes which enable diagnosis and counteracting threats resulting from addiction and violence and which tend to the strengthening of self-esteem in the adolescents and their ability to cope with problems.

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DIVERSIFICATION OF THE EFFECTIVENESS
OF PERFORMANCE OF SELECTED TECHNICAL ELEMENTS
IN FEMALE AND MALE FOOTBALL GAME

Key words: football, comparative analysis of play, women, men

Introduction

Throughout the 20th century as well as in the new 21st century numerous tournaments were and are organized for high stakes, such as world championships, Olympic Games or the European Cup in men's football. This fact has allowed making a good recognition of the male play. The analyses contain motor activity profile, body response to training load, as well as the factors influencing the effectiveness of technical activities in the game. Changes are being investigated and the trends regarding both individual and group activity in the foreign (Carey 2001, Hewitt et al. 2008, Jin 2002, Krustrup et al. 2008, Konstadinidou, Tsigilis 2005, Kunh 2005, Loy 1994, Reilly 1994) and in the Polish research (Bergier 2000, Panfil 1989, Szwarc 2004, Śledziewski 1989, Wrzos 2006).

The female football can be described as expanding worldwide, including Europe. This young sports discipline requires recognition and continuous observation. With growing boldness the scientific research in our country deals with the subject of female football analysis (Bergier 2005, Bergier, Buraczewski 2005, Bergier, Soroka 2005 a, b, Bergier et al. 2008, Soroka 2007, Soroka, Bergier 2006).

In contemporary sport, the results of objective research make the ground for effective training work and are the proper way to success. Recognition of the values from the viewpoint of match analyses gives much support for the training practice. It helps trainers and competitors in their better recognition and understanding, which eventually allows rational assignment of the training duties. Therefore, the criteria have been continuously searched for concerning the assessment of individual and group activities and the methods of their record and game analysis (Naglak 1996).

Study goal

Taking into account the more and more frequent research concerning female football focusing on the match activities analysis with regard to the quantitative structure and effectiveness, the need has emerged to compare the female and the male play. It seems that the comparative analysis of the basic technical elements, like passes and shots, should allow determination of the differences and uniqueness of male and female play. Eventually, it should bring new values in the training process, as the present sports training theory has been worked out for men and to a large extent may not be employed in the female sports training process (Socha 2005).

The goal of this work is to recognize the effectiveness of passes and their technical elements in association with direction, distance and performance mode, and of shots with the technique and mode of their performance.

The following research hypotheses have been formulated:

1. In female and male play there are differences in the structure of performing the basic technical elements, like passes and shots.
2. Differences occur (to the male teams' advantage) in the effectiveness of passes and shots performance.

Material and methods

The material for the study comprised the observation of 15 (all) matches played in the 6th European Championship in female football, England 2005, and 27 matches played during the world championship in male football, Korea and Japan 2002. In the statistical analyses only the winning matches were included: 12 played by women and 19 by man. Passes of ball were analysed with regard to direction, distance and mode. Their qualitative and quantitative parameters were determined as well. In shots analysis, the same parameters were considered as in case of passes, and additionally the shooting technique.

As a study method the systematic external observation was applied, categorised through a standardized research tool in the form of own observation forms. The observation was done while playing back the football matches recorded previously on DVD records from the TV broadcast.

A statistical analysis of the study results was done using the *Statistica* software. Applied was the assessment of differences between the mean values of the coefficients of passes and shots accuracy and of their technical elements.

Normal distribution and ***variance*** homogeneity of the correlated variables were tested. With the conditions met, the Student's T-test was conducted for the independent groups. In the case the parametric conditions could not be met, the non-parametric Mann-Whitney U-test was applied, as relevant for two independent samples.

Study results

Characteristics of passes diversification in female and male play

Ball passing is the main tool in football playing. It helps construct actions which should allow a successful shot at goal.

The characteristics of passes (Tab. 1) shows that on the average the women passed the ball more often than the men but the latter performed with higher accuracy. The evidence for making more mistakes by women while passing the ball is the statistically significant variation in pass accuracy at $p<0.001$ to the male teams' advantage (Tab. 6).

Tab. 1. Overall characteristics of passes.

	Effectiveness of passes	Women	Men
1	**Number of passes in total**	6140	20318
2	**Mean per match in total (quantity)**	409	376
3	**Number of accurate passes**	4388	16074
4	**Mean per match accurate passes (quantity)**	292	298
5	**Accuracy coefficient**	71.5%	79.1%

Tab. 2. Characteristics of passes diversification with regard to direction.

	Women		Men	
Direction	**Per cent share (%)**	**Accuracy coefficient (%)**	**Per cent share (%)**	**Accuracy coefficient (%)**
Perpendicular	51.3	66.3	40.9	74.0
Oblique	21.4	66.8	31.5	88.8
Transverse	27.3	82.6	27.6	86.9

Analysis of the ball passing results with regard to direction allows concluding that for both groups only small differences can be found, concerning the transverse passes (women 27.3%, men 27.6%) (Tab. 2). The same conclusion regards the accuracy, making no difference for women and men (Tab. 5).

The difference was found regarding perpendicular passes executed more often by the female teams – 51.3% than by the male teams – 40.9%, and regarding the oblique passes, more frequent in male play – 31.5% than in

female games – 21.4%. Statistically significant differences were also found with regard to the pass accuracy, both perpendicular and oblique. In both cases, the statistical significance equaled p<0.001 with a higher performance accuracy of the male teams (tab. 5 and 6).

Tab. 3. Characteristics of passes diversification with regard to distance.

Distance	Women		Men	
	Per cent share (%)	Accuracy coefficient (%)	Per cent share (%)	Accuracy coefficient (%)
Short – to 10 m	19.4	76.4	46.5	77.7
Medium – from 10 to 25 m	57.6	74.0	40.7	70.2
Long – above 25 m	23.0	52.7	12.8	70.2

Short-distance passes were performed more often by men – 46.5% than by women – 19.4%. Their accuracy was 77.7% and it was very close to that of women – 76.4%. The female teams more often passed the ball over a medium or long distance: 57.6% and 23.0%, respectively.

Women were more accurate at performing oblique passes, which was shown by the statistical significance of p<0.05. Men executed with more precision the passes over long distances, exceeding 25 m; the statistical significance was p<0.001 (Tab. 6).

The female teams applied passes without ball reception more often than the male teams, 54.7% and 41.4%, respectively. However, men more frequently passed the ball after reception – 33.1%, especially after dribble – 22.5%. Respectively, the female teams executed the passes: after reception – 28.9% and after dribble – 15.8% (Tab. 4).

In all modes of play men were considerably more accurate. The significance level for passes without reception and after the ball reception was p<0.001 while in the case of passes after dribble the level was p<0.01 (Tab. 5).

Tab. 4. Characteristics of the diversification of passes with regard to the mode of play.

Mode of play	Women		Men	
	Per cent share (%)	Accuracy coefficient (%)	Per cent share (%)	Accuracy coefficient (%)
Without ball reception	54.7	63.8	41.4	73.7
After ball reception	28.9	78.2	33.1	84.0
After dribble	15.8	74.5	22.5	81.5

Tab. 5. Diversification of the mean values of the accuracy coefficients regarding technical elements of female and male passes (Mann-Whitney U-test).

Technical elements of passes	Rank sum of male teams	Rank sum of female teams	Mann-Whitney U-test value	Precise *p*
Direction – perpendicular passes	1848.0	498.0	33.0	0.001***
Direction – transverse passes	1181.0	1165.0	440.0	0.108
Technique – without ball reception	1700.0	646.0	181.0	0.001***
Technique – after reception	1649.0	697.0	232.0	0.001***
Technique – after dribble	1547.0	799.0	334.4	0.003**

*** refers to the level of significance p<0.01, *** refers to the level of significance p<0.001*

Tab. 6. Diversification of the mean values of the accuracy coefficients regarding technical elements of female and male passes (Student's T-test).

Technical elements of passes	Male teams		Female teams		Student's T-test	
	Mean value of the accuracy coefficient	Standard deviation value	Mean value of the accuracy coefficient	Standard deviation value	*t* – Student's value	Significance level *p*
Accuracy of passes in total	79.1	4.4	71.5	6.4	6.144	0.001***
Direction – oblique passes	88.8	9.4	66.8	8.5	9.905	0.001***
Distance – short passes	77.5	6.5	76.4	7.3	0.694	0.489
Distance – medium passes	70.2	7.9	74.0	5.9	-2.163	0.034*
Distance – long passes	70.2	7.9	52.7	12.4	6.439	0.001**

* refers to the level of significance p<0.05, ** refers to the level of significance p<0.01,*
**** refers to the level of significance p<0.001*

Characteristics of the shooting technique of the female and male teams

In the structure of shots the female teams performed 11.8 shots on the average per match while the male teams 11.4. The differences to the women's advantage regarded the effectiveness which was 14.2% for women and 9.6% for men. The differences were also revealed regarding the accuracy of shots with the same pattern of dominance: women – 49.3%, men 44.9% (Tab. 7).

Tab. 7. Overall characteristics of shots.

Effectiveness of shots	Women	Men
Number of shots in total	353	617
Number of accurate shots	174	277
Number of effective shots	50	59
Accuracy coefficient%	49.3	44.9
Effectiveness coefficient%	14.2	9.6
Shots per match on average (quantity)	11.8	11.4

The evidence for a faster play with the ball of the female teams is the more frequent shooting without the ball reception – 61.2% with only 47.0% for men. However, the male players executed shots more frequently after dribble – 24.5%, compared to 13.3% for the female players. Moreover, men shot nearly two times more often after a set piece of the game – 9.7% while women only 5.1% (Fig. 1, Tab. 8).
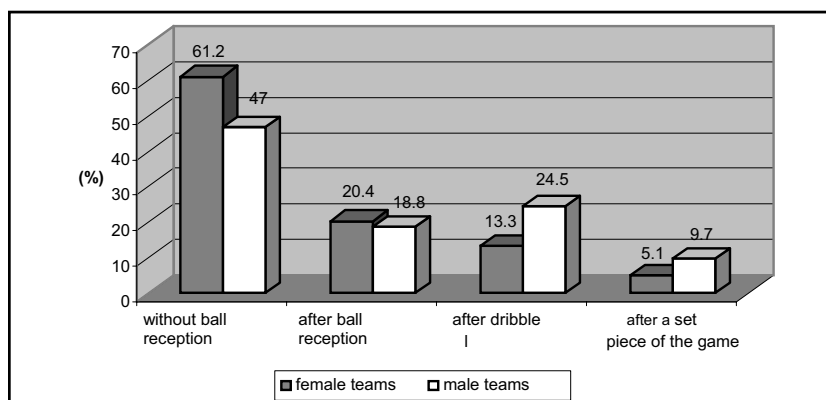
Fig. 1. Diversification of the structure of shooting at goal modes by the female and male teams.

The effectiveness of shots for most performance ways had higher efficiency coefficients in case of women (without ball reception – 17.1%, after reception 8.3% and after a set piece of the game – 22.2%) than of men (without ball reception – 12.4%, after reception 6.9%, after a set piece of the game – 10.2%). Minimally higher was the effectiveness of shots performed by men after dribble – 7.3%, women – 6.0%. Despite the higher effectiveness coefficients for the female shots, the differences were statistically insignificant (Tab. 8).

Tab. 8. Characteristics of the diversification of the female and male teams shots, depending on the performance mode.

Qualitative and quantitative structure of a shot		Mode of shooting			
		Without ball reception	After ball reception	After dribble	After a set piece of the game
Women	**Number of shots**	216	72	47	18
	Share in the shots structure (%)	61.2	20.4	13.3	5.1
	Number of effective shots	37	6	3	4
	Share in the effective shots structure	74.0	12.0	6.0	8.0
	Effectiveness coefficient (%)	17.1	8.3	6.4	22.2
Men	**Number of shots**	290	116	151	66
	Share in the shots structure (%)	47.0	18.8	24.5	9.7
	Number of effective shots	36	8	9	6.0
	Share in the effective shots structure	61.0	13.5	15.5	6.0
	Effectiveness coefficient (%)	12.4	6.9	7.3	10.0
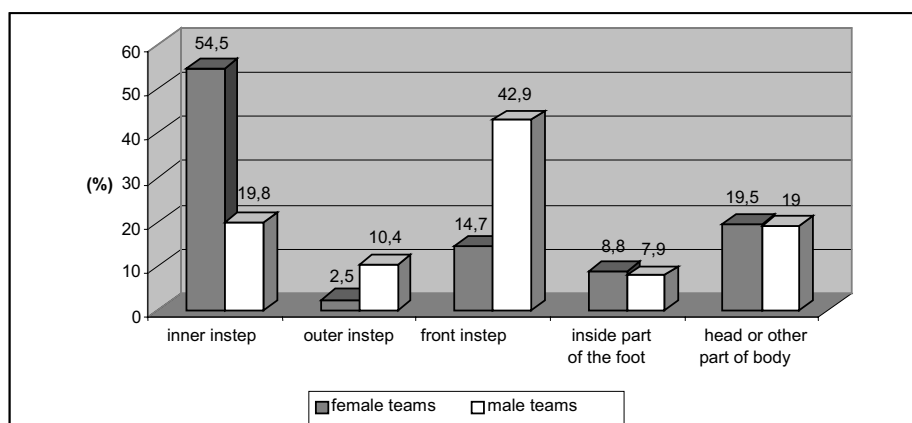
Fig. 2. Diversification of the structure of shooting technique in female and male teams.

In the structure of the shooting technique observable are the considerable differences particularly regarding the shots executed with inner instep (women 54.5%, men 19.8%) and with front instep (women 14.7%, men 42.9%). The shots executed with outer instep were more frequent in male play – 10.4% than in female – 2.5%. As for the shots executed with inside of the foot or with head and other body parts no significant differences were found between the sexes (fig. 2 and tab. 9).

Tab. 9. Characteristics of the diversification of shots performed by female and male teams, depending on the execution technique.

Qualitative and quantitative structures of shots		Shooting technique				
		Inner instep	Outer instep	Front instep	Inside of the foot	Head and other body parts
Women	Number of shots	192	9	52	31	69
	Share in the shots structure (%)	54.5	2.5	14.7	8.8	19.5
	Number of effective shots	19	4	3	13	11
	Share in the effective shots structure	38.0	8.0	6.0	26.0	22.0
	Effectiveness coefficient (%)	9.9	44.4	5.0	40.4	16.0
Men	Number of shots	122	64	265	49	117
	Share in the shots structure (%)	19.8	10.4	42.9	7.9	19.0
	Number of effective shots	7	2	16	17	17
	Share in the effective shots structure	11.9	3.4	27.1	28.8	29.2
	Effectiveness coefficient (%)	5.7	3.1	6	34.7	14.5

Tab. 10. Diversification of the mean values of the accuracy coefficients regarding shots performed by female and male teams (Student's T-test).

Technical elements of a shot	Winner teams		Loser teams		Student's T-test	
	Mean value of the accuracy coefficient	Standard deviation value	Mean value of the accuracy coefficient	Standard deviation value	t – Student's value	Significance level p
Shots accuracy in total %	45,1	16,7	48,0	13,4	-0,784	0,437
Technique – front instep %	42,3	27,2	33,3	39,7	1,033	0,305

The highest effectiveness in both groups was associated with the shots executed using the inside of the foot (women 40.4%, men 34.7%). Women shot the ball with the inner instep nearly two times more effectively than men (women 9.9%, men 5.7%) (Tab. 9). The largest variation, statistically significant ($p < 0.05$), occurred when the shots were performed with the outer instep (women – 44.4%, men – 3.1%) (Tab. 10 and 11).

Tab. 11. Diversification of the mean values of the accuracy coefficients regarding technical shooting elements of female and male teams (Mann-Whitney U-test).

Technical elements of a shot	Rank sum of male teams	Rank sum of female teams	Mann-Whitney U-test value	Precise *p*
Shot effectiveness in total	1176.5	1169.5	435.5	0.096
Technique – inner instep	1241.5	969.5	504.5	0.647
Technique – outer instep	416.0	179.0	38.8	0.016*
Technique – inside of the foot	459.0	402.0	206.0	0.937
Mode – without reception	1285.5	1060.5	544.5	0.752
Mode – after reception	948.5	1004.5	353.5	0.083
Mode – after dribble	824.5	660.5	296.5	0.328
Mode – after a set piece of the game gry	675.0	271.0	166.0	0.337

* refers to the level of significance p<0.05

Conclusions

1. The hypothesis has been confirmed about the diversification of the structure of game with respect to the basic technical elements, like passes and shots. On the average, women passed the ball in a match more times than men. They preferred perpendicular passes, medium and long in distance, and using the no-reception technique. On the other hand, men executed more of the oblique passes, short in distance, and after dribble. While shooting, women used the inner instep more and did not receive the ball whereas the male teams used the front instep after reception or dribble.

2. Significant diversifications occurred regarding the passes accuracy with respect to most of the technical elements. In every examined case the diversification was to the male teams' benefit. No significant diversifications have been observed regarding shots aimed at goal (except the effectiveness of shots performed with the outer instep) between the female and male teams.

Abstract

In contemporary sport the results of objective studies make the ground for effective training and are the proper way to success. Since the study results have been appearing of the women's play, concerning analysis of the structure and effectiveness of the match activities, there is a need for comparisons between the female and male play. The material for the study compri-

sed all 15 matches played in the 6th Women European Championship, England 2005, and 27 matches played during the men world championship, Korea and Japan 2002. The study method was the systematic external and categorized observation conducted with the help of own study tool – the observation forms. Statistical analysis of the study results was done using the *Statistica* software. The assessment was used of the differences between the mean values of the passes and shots accuracy coefficients, and of their technical elements. In the analysis, the diversification has been found regarding the structure of game at the main technical elements like passes and shots, between the female and male teams. Significant diversifications concerned the passes accuracy in association with most of the analysed technical elements.

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JAVA INTERFACES FOR XML DOCUMENT HANDLING

Key words: Java, XML, Java interfaces, SAX, DOM, JAXP

Introduction

Java is commonly thought to have the widest range of API interfaces for XML handling. It is Java which sets standards for the manner of handling XML from the application level, although such languages as C, C++ and Perl are catching up. Currently, there are three major leading API interfaces for XML handling:

- **SAX** (*Simple API for XML*)
- **DOM** (*Document Object Model*)
- **JAXP** (*JAVA API for XML Parsing*)

Seen from the application point of view, XML document processing can be divided into two stages, shown in Fig. 1. These are: document processing and analysing the data contained in it.

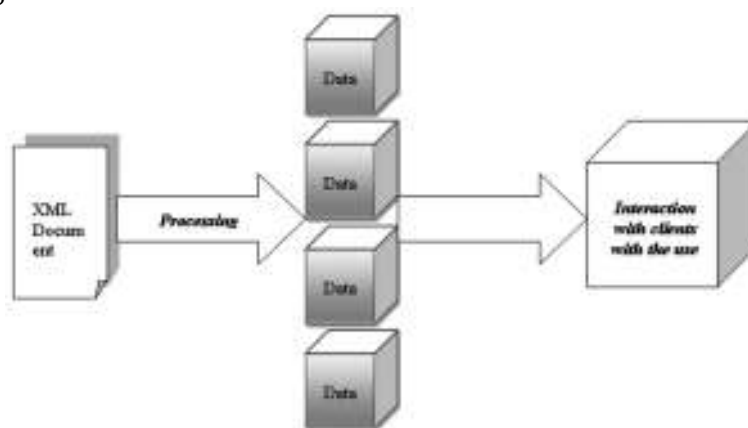**Fig. 1.** An XML document processing cycle
from an application point of view

1. SAX (Simple API for XML)
SAX is a simple API interface for XML handling. To process XML data, it employs structure-based event handling. At each stage, events which may

occur are defined. For example, SAX defines the interface *org.xml.sax.ContentHandler*, which in turn defines the methods, such as *startDocument()* and *endElement()*. Such an interface helps gain control over the relevant stages of XML document processing. A similar interface has been created for handling errors and lexical structures. A set of errors and warnings is defined to help handle different situations that may occur when an XML document is being processed, *e.g.* encountering an incorrect or incorrectly formatted document. New behaviours may be added, which help handle tasks associated with highly specific applications – all this within the XML standard application.

1.1. How SAX works

The sequential model offered by SAX does not offer free access to an XML document. When using the SAX, we take information on the XML document when it is done by the parser and – like a parser – we lose the information. When another element appears, information in the previous element is inaccessible because the element has not yet been processed. When the next element appears, we cannot go back to the previous one. Obviously, we can retain information encountered while processing, but it may be difficult to encode such special cases. An alternative could be provided by creating a representation of an XML document in the memory, *i.e.* the DOM model.

1.2. Limitations of SAX

Another task which is difficult to perform with the SAX interface is going from one element to another, situated on the same level. Access to elements through SAX is largely hierarchical and sequential. We get access to the final element of a node, subsequently we go "up" the tree and then we again go down to another element at the bottom of the hierarchy. There is no clear reference to the hierarchy "level" on which we are at the moment. Although levels can be identified by means of sophisticated counters, basically SAX is not suited to such operations. It lacks an implemented concept of a sibling element, the next element on the same level; it is also impossible to check which elements are embedded in which.

2. DOM (Document Object Model)

DOM is an API interface for the Document Object Model. SAX only provides access to data in an XML document, while DOM enables the user to process data. An XML document in a DOM interface is represented as a tree-like structure. Since such a way of representation has been known for long, it is not difficult to search and process such structures from a programming language level. In a DOM interface, the entire XML document is entered in memory and all the data are stored as *nodes*, which enables quick

access to specific parts of the document – everything is stored in memory as long as a DOM tree exists. Particular nodes correspond to particular data taken from the original document.

Unlike the SAX interface, the document object model has been developed in the W3C consortium. SAX is a public domain software, a result of long discussion in the *XML-dev* mailing list, whereas DOM is a standard in itself, like XML.

2.1. DOM application in Java

In order to be able to use the DOM in a specific programming language, interfaces and classes should be applied and the DOM model itself should be implemented. Since the applied methods are not specified in the DOM specification, it was necessary to develop the language interfaces representing a conceptual structure of the DOM model – both for Java and for other languages. The interfaces enable the user to process documents in the manner described in the DOM specification („*Java and XML*", Helion, Brett McLaughlin, 2003.).

Most processors do not independently generate DOM input data. To do this, they use an XML parser, whose task is to generate a DOM tree. Therefore, it is the XML parser rather than the XSLT processor that will have the necessary DOM classes. Since by default Apache Xalan uses the Xerces parser for the DOM model generation and processing, the DOM handling, described below, will take place from the level of that tool.

2.2. How DOM works

In order to familiarise oneself with how the DOM model works, it is best to show the way in which the Apache Xalan processor receives an XML document in a DOM tree-like structure.

The DOM model does not define how a DOM tree is created. The authors of the specification have focused on API structure and interfaces used for manipulating the tree. There is considerable freedom of the DOM parser implementation. Unlike in the SAX XMLReader class, which dynamically loads the implementation, in DOM it is the programmer who has to openly import and create a copy of DOM parser class of a specific manufacturer. Shown below is a way of using DOM in a code fragment. The first thing is to create DOM parser implementation *(listing 1)*.

```
// Importuje parser DOM
import org.apache.xerces.parsers.DOMParser;
public class MyActionListener implements ActionListener {
 public void actionPerformed(ActionEvent e) {
 // Tworze egzemplarz implementacji parsera DOM
 DOMParser parser = new DOMParser();
 try {
 parser.parse(path);
                Document doc = parser.getDocument();
                processNode(doc);
 } catch (Exception e) {
 System.out.println(„Błąd w przetwarzaniu: „ +
 e.getMessage());
 }
 }
```

Listing 1. Creating implementation for the DOM parser DOM.

As is seen in the source code presented above, first the Apache Xerces DOMParser class is imported and its copy is created. The DOM model operation is focused on the output data from processing. The data cannot be used until the entire document has been created and added to the do initial tree structure. The processing output data, which are to be used by DOM interfaces, have the form of a org.w3c.dom.Document. document. The object acts as an "operation manual" for the tree into which the XML data have been input. From the point of view of the element hierarchy, the object is situated one level "above" the main element of an XML document. In other words, each element of the input XML document is directly or indirectly a child element against it.

In order to retain the standard interface in the SAX and DOM parsers, the parse() method, seen in the code, is of the "void" type, like the one used in the SAX model. Owing to it, the application can use a DOM and SAX class parser interchangeably, but it implies the necessity to develop a new method to get the Document object, which is the result of XML processing. In the Apache Xerces parser, the method is called getDocument()(*„Java and XML*", Helion, Brett McLaughlin, 2003.).

2.3. The DOM tree

In order to show how one can go through the structure of a previously obtained DOM object, it is best to take a initial Document type object and process its every node and all its child nodes. In order to understand the process principle, one should view the basic objects through which access to

XML data will be provided. A Dokument object has been described earlier and presented in Fig. 2 with other basic interfaces of DOM objects (which also shows interfaces used less frequently).

With these interfaces, it is possible to process data within the DOM tree. Particular attention should be paid to the Node interface, as this is the basis for all the others. It is noteworthy that it is possible to develop a method which takes the node, recognises the DOM structure of the node and processes the node in a suitable manner. In this way, the entire DOM tree can be processed with one method. When the node has been processed, available methods can be used to go to the next sibling element, taking attributes (if it is an element) and handling any possible special cases. Subsequently, performing iteration along child nodes, the method is recurrently started on each of the nodes. It is the simplest and clearest method of DOM tree handling.
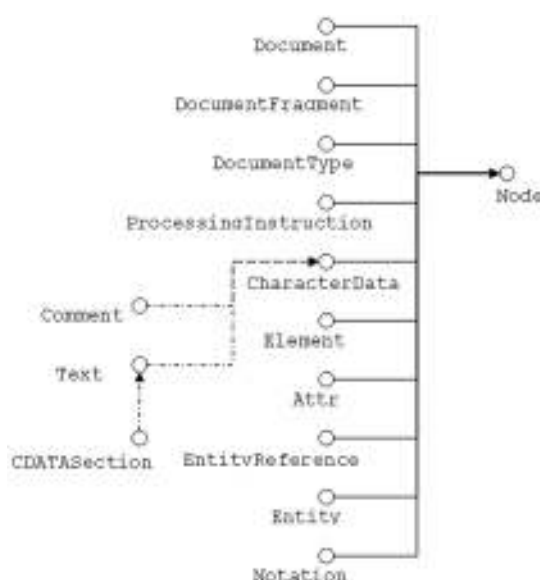

Fig. 2. Presentation of the basic interfaces and classes of DOM Level 2.

Since the Document itself is a Node of the DOM model, it can be transferred unchanged to the processing method. Before a skeleton of such a method has been created, relevant importing instructions have to be added and the taking and processing method for the DOM Node object has to be declared (see *listing 2*):

```
import org.w3c.dom.Document;
import org.w3c.dom.Node;
// Import parsera DOM
import org.apache.xerces.parsers.DOMParser;
 public void processNode(Node node) {
 // Rozpoznanie typu węzła
 // Przetworzenie węzła
     // Przetworzenie rekurencyjne węzłów potomnych
}
```

Listing 2. Declaration of packages and the DOM tree processing method.

When the method skeleton is in the right place, the method can be run on the initial object Document and you can recursively process the structure until the entire tree has been processed. It is possible thanks to the fact that the Document is a part of the common Node interface.

Finally, a certain drawback of the DOM model should be mentioned. As the entire document is entered in memory, system resources run out quickly, often causing applications to slow down or even preventing them from functioning correctly. Using the DOM model requires engaging the amount of memory in proportion to the size and complexity of the XML document. There is no way in which the demand for memory can be reduced. Moreover, the transformations themselves burden the system on which they are run, which in combination with the memory-related requirements may result in having to use a different way of processing an XML document. If a small document, below one MB, is processed, any problems are unlikely. Larger documents – technical handbooks or entire books – may use up the system resources and affect the application efficiency. Therefore, the choice of the appropriate interface for XML document processing should be made carefully. The choice of the best solution for a specific program project will be decided by the application characteristics.

3. JAXP (Java Api for XML Parsing).

JAXP is a Java interface for XML processing, developed by Sun Microsystems. The aim of the interface is to ensure coherence between the SAX and DOM interfaces. It is not meant as competition for them, nor has it been developed to become their successor. It just offers simplified methods aimed at facilitating the use of Java interfaces in XML document handling. It is compatible with the SAX and DOM specifications and with recommendations regarding namespaces. JAXP does not define how SAX or DOM interfaces should behave, but it provides a standard access layer for all the XML parsers from Java level.(„*Java and XML*" published by Helion, Brett McLaughlin, 2003)

JAXP is expected to evolve as the SAX and DOM interfaces are modified. One can also forecast that it will ultimately take its place among other Sun specifications, as both the Tomcat servlet mechanism and the EIB specification require XML-formatted files for configuration and implementation.

Summary

Two important trends have emerged recently: XML stream processing and XML object mapping. Both seem to be very important for its future. The first is like to replace the SAX model in a longer perspective, while the latter will take the place of DOM. When this will take place depends mainly on how long software manufacturers will support these solutions and to what extent they will be developed and improved.

Abstract

This paper discusses the basic Java interfaces, which are used for XML document handling. Three interfaces have been discussed: SAX – used for sequential document processing, DOM – document object model and JAXP – an interface which imparts coherence to the SAX and DOM techniques. The paper presents their major features, differences and practical applications.

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Małgorzata Dąbrowska

THE ROLE OF INDIVIDUAL DIFFERENCES IN LEARNER ACTIVATION OF LANGUAGE LEARNING STRATEGIES
PART I. THE AGE FACTOR: AN OVERVIEW OF THE RESEARCH

Key words: individual differences (IDs) (cognitive and affective), 'good language learners', language learner strategies, age, language teaching/learning, strategy training

Introduction

For about four decades, it has been clear that second/foreign language teaching (L2/FL) methodologies or special learning agendas, no matter how thoroughly planned and how well designed, can neither be considered complete nor prove effective if researchers and teachers do not attach equal importance to the variety of notions that come under the umbrella concept of *individual learner differences*. Apart from age, these concern two domains: (1) *the cognitive domain* of language learning with its two aspects of human learning in general and individual cognitive variables that comprise general intelligence (IQ), language aptitude, varied processes, styles and strategies, and (2) *the affective domain* with its intrinsic aspect of learner attitudes and beliefs, perception of the self and others, motivation and personality traits, as well as its extrinsic side of sociocultural variables (Brown, 2000; cf. Komorowska, 1978; Arnold, 1999).

Psychology shows that both domains are actively involved in all learning processes, condition and complement each other's functioning, and that learners differ with respect to these spheres considerably. In fact, all acts of learning and language learning, and, essentially, learner choice and application of strategies for language learning and use, remain under complex impacts of age-related characteristics and a host of interrelated individual factors (IDs) of a cognitive and affective nature. These, in turn, determine the course of language learning, its rate, and the degree of ultimate success or failure in the language learning venture (Skehan, 1989; Ellis, 1994; Oxford, 2002; Dornyei, 2005).

In the 1970s, research on features and behaviours of 'good language learners' triggered the search for the most effective ways of supporting their development in all learners, while studies concerning the role and impact of individual differences (IDs) within the field of Second Language Acquisition (SLA) and issues centered around language learner strategies

have become vital incentives stimulating the search for new forms of work, new teaching and learning solutions which could help all the different learners become more successful, or more effective language learners (Komorowska, 2000). This does not only require a thorough understanding of learner age characteristics and their role in the learner's choice and activation of language learning strategies, but also necessitates equal treatment of *both* the learner's cognitive and affective domains and their impacts on language learning and use, including the learner's strategic decisions and behaviours. In this series of three articles, the author will, therefore, explore the issue of individual differences and their influence on language learners' strategy use, focusing on the role of learner age and selected factors of each domain in L2/FL learning separately, as well as suggest implications for L2/FL teaching and learning.

Individual learner differences: definition and classifications

Individual learner differences (IDs) or, as Dornyei (2005) emphasizes, dimensions of enduring characteristics of a person which make him/her unique and distinct from other people, and which appear to be the most consistent predictors of success in language learning, do not constitute unitary constructs, but behavioural clusters. Each of them is "a complex of features which are manifest in a range of overlapping behaviours" (Ellis, 1985:100). This makes them particularly difficult to identify, describe, and classify. In an attempt to categorize this diversity of factors, which may affect L2/FL learning by influencing the learner's strategy choice and use, researchers propose certain criteria.

Most generally, IDs can be divided depending on whether they belong to the human *cognitive domain* or *affective domain* (Brown, 2000). In fact, the criterion informs the discussion of the role of selected IDs in this series of articles. However, it must also be noted that Ellis (1985) distinguishes between *personal* and *general* factors, which is related to the range of factor appearance. Thus, personal factors are learner-specific and refer to all the highly idiosyncratic ways in which individuals tend to approach the task of language learning. These include both *cognitive* factors (e.g. individual learning techniques) and *affective* features (e.g. attitudes to teachers and materials, learners' overt comparisons of themselves to others in a group). General factors, on the other hand, characterize all learners and comprise age (and therefore the stage of learner physical, intellectual, emotional, and social development), intelligence and

aptitude, cognitive styles, motivation, and personality traits. In fact, both types have their *social*, *cognitive*, and *affective* aspects. Social factors, external to the learner, are conditioned by his/her relationships with other people. Cognitive factors, internal to the learner, are related to the problem-solving strategies which he/she typically activates. Affective factors, also learner-internal, are associated with emotional reactions to varied language learning tasks. Additionally, Ellis (1985) divides IDs into factors that are *unmodifiable* in the course of language learning (e.g. aptitude, age, sex), and those that are *modifiable* (e.g. learning aims and strategies, attitudes and beliefs, motivation). (This last division seems particularly crucial for language teachers and learners alike, since it is relevant to the idea of helping learners become more successful via purposeful strategy training.)

Furthermore, Tudor (1997) discusses IDs in terms of two main types of *psychological* factors and *cognitive* variables. The former are the learner's psychological and affective responses to the interpersonal dimension of L2/FL learning. The latter imply learners' organization of their actual experience of the world, language and language learning, and their learning preferences, or ways in which they comprehend, store, and use information. Tudor adds, however, that his distinction cannot be treated as cut-and-dried, since the relationships between IDs tend to be complex, their dividing lines are often vague, and thus some (e.g. ambiguity tolerance) could belong to both categories.

Knowledge of these constructs and their role in learner use of strategies for language learning in general is still very limited, mainly due to the fact that they are not directly observable. Moreover, learner IDs, feelings and emotions are so intertwined within the processes of language learning and use that the impact of no one of them can be isolated entirely for investigation, comparison, interpretation and evaluation (Arnold and Brown, 1999; Brown, 2000). Nevertheless, referring to the SLA literature, in this series of three articles the author will venture to describe selected factors and provide their definitions and evidence of influence on L2/FL learning via learners' differing strategic behaviours.

Features and behaviours of 'good' and less successful language learners

The notion of 'language learner strategies' has become commonplace in SLA studies since the 1970s when theorists, researchers, and language teachers began to realize the impossibility of discovering or inventing a single, universal method or technique of teaching that could

guarantee all learners successful accomplishment of the complex task of second/foreign language learning. The earlier unexplained variability in ultimate levels of language learning success among learners was also associated with and attributed to a number of learner-specific behavioural patterns and thinking processes. These constitute the highly individual approaches that learners employ in order to obtain and process new information, regulate their own interaction with the incoming knowledge and new meanings, relate them to already existing, hierarchically organized cognitive structures, generalize the newly acquired entities, store them in long-term memory, retrieve them, and monitor their later use (cf. Droździał-Szelest, 1997).

Thus, cognitive science developments of the 1960s and 1970s and a growing interest amongst psychologists and linguists oriented mainly towards the cognitive strategies that people generally use to think, learn, and solve problems also stimulated the study of learner approaches to second language learning in and out of the classroom. Cognitive psychologists' conviction that learners are actively engaged in the process of learning accentuated the role of mental processes and triggered research into cognitive processing and the learner's strategies that are involved in L2/FL learning (Wenden, 1987; 1991; O'Malley and Chamot, 1990; Chamot *et al.*, 1999). Simultaneously, the issue of a 'good' or successful and, subsequently, autonomous, self-directed, or self-regulated language learner surfaced in the literature on the subject.

Research on the 'good language learner' (GLL), his/her traits and strategies can, in fact, be traced back to Aaron Carton's 1966 investigation of learner variability in the "ability to make valid, rational, and reasonable inferences" (Rubin, 1987:19). As a result of his studies, Carton (1971) concluded that L2 learning could not be discussed in terms of skills only, because it resembles complex intellectual processes, or problem-solving, in which varied kinds of learner knowledge and experiences may be involved in language processing. Moreover, he observed that learners' ability to draw good inferences altered in relation to their individual tolerance of risk (Rubin, 1987). Thus, it has become clear that learners differ in the way they approach and accomplish the language learning task.

Inspired by his work, Rubin initiated research in this area in 1971. She sought to identify those behaviours of GLLs which could be contributing to their ultimate success. In fact, most of the early research on learning strategies in SLA focused on attempts to identify, describe, and classify strategies activated by more and less competent students in order to determine which behaviours could be taught to less able learners and, in this way, proceed to the creation of effective schemes of strategy instruction. The results presented by Rubin in 1975

covered the following variables typical of self-defined good learners: *learner psychological characteristics* (i.e. risk-taking, tolerance of ambiguity and vagueness, willingness to appear foolish), *learner communication strategies* (circumlocution and gestures), *learner social strategies* (looking for possibilities to use language), and *learner cognitive strategies* (guessing/inferencing, practising, attending to form by analyzing, categorizing and synthesizing, and monitoring) (Rubin, 1987:20).

Rubin's first generalizations about the traits and behaviours of good language learners were intuitive in nature and based mainly on teacher experience and observation. Thus, she described good L2 learners as willing and accurate guessers who seek opportunities to communicate and learn from communication, who are uninhibited about mistakes, focus on both structure and meaning, look for language patterns, take advantage of opportunities for practice, and monitor their own and others' speech (Rubin, 1975). She also noticed that their strategy choice and employment depended on the nature of the learning task in hand, the learner's proficiency level and age, contexts of learning, general learning styles, and learner personality traits (cf. Droździał-Szelest, 1997).

Many researchers describe strategies activated by successful language learners (see, e.g. Stern, 1975, 1983; Naiman *et al.*, 1978; Rubin and Thompson, 1982; Ellis and Sinclair, 1989; Cohen, 1998). Oxford (1990, 2002), whose definition and system of learning strategies will be focused on further in the article, divides the strategies of good learners into six classes. She claims that GLLs apply *metacognitive strategies* to manage their own learning by paying attention, actively looking for practice opportunities, planning, monitoring errors, or self-evaluating progress. Also, good L2 learners resort to *affective strategies* such as anxiety reduction via the use of music, laughter, meditation, or apply self-encouragement and self-rewarding to control their emotions. They activate *social strategies* to learn with others, ask questions, cooperate with native speakers of the target language, and develop cultural awareness. GLLs use *memory-related strategies* to organize new information and retrieve it when needed by grouping, rhyming, imagery, physical movement, and structured reviewing. They manipulate an L2 directly using *general cognitive strategies* of practising naturalistically, reasoning, analyzing contrastively or summarizing. Finally, they also use *communication*, or *compensatory strategies* to cope with linguistic limitations; thus, they guess meanings intelligently and actively employ synonyms, as well as other communication tricks (Oxford, 1989).

Less successful learners are often thought of as possessing underdeveloped strategy repertoires; however, they also apply learning strategies and sometimes do so actively.

Nevertheless, studies indicate that less effective students seem to follow different patterns of strategy employment (Abraham and Vann, 1987). In fact, they appear to lack appropriately developed and directed higher-order metacognitive, or self-regulatory, strategies needed to properly manipulate other strategies in response to the nature of the task in hand (Vann and Abraham, 1990). Good language learners, on the other hand, tend to be better at assessing learning activities, identifying task-related aims and their own learning problems and, as a result, resort to more effective strategies that enable them to complete different tasks and overcome difficulties. All the descriptive studies conducted so far confirm that both successful and less competent language learners do utilize certain strategies for L2 learning, but GLLs differ from their less effective peers in a more adequate choice and more skillful application of language learning strategies. Moreover, good language learners appear to employ more varied strategies and do this more frequently (cf. O'Malley and Chamot, 1990; Drożdział-Szelest, 1997).

An overview of attempts at specifying characteristics that distinguish successful L2 learners from less competent ones could, in fact, be reduced to eight major aspects of the issue, and shows that GLLs are aware of language as a system and as a means of communication and interaction; they are concerned about both language forms and functional practice, develop an awareness of the learning process itself and approach it in active ways, willingly seek opportunities for language exploration; use strategies flexibly in response to task requirements, utilize their prior linguistic knowledge and knowledge of the world in order to learn and communicate, effectively manage the learning process, and know how to cope with its affective demands (Ellis, 1994). Dakowska (2001) adds that good language learners are eager to obtain feedback, seem most accurate using it to correct their errors, cooperate with their teachers, and respect teacher advice, while Siek-Piskozub (1997) stresses that highly successful learners use strategies consciously. All in all, as Dornyei (2005) concludes, good language learners excel because, among other factors, they participate in the learning process creatively, apply individualized learning strategies and, in this way, proactively contribute to the enhancement of their language learning effectiveness. Thus, they know how to learn.

Language learner strategies: a practical definition and typology

The research of the good language learner's characteristics and behaviours has, in fact, produced a number of overlapping sets of traits and strategies which, nevertheless, suggest that learners are far from being passive in the learning process, and which provide rich and useful insights into the nature of language learning and learner strategic behaviours. It has also contributed to the development of research directed at identifying, characterizing, defining, and classifying language learner strategies.

The literature on the subject, however, still seems highly speculative and theoretical. It provides a great variety of often confusing, overlapping, or even conflicting opinions on how to explain, define, and classify not only more conceptually complex issues in the area, but even key terms. The literature has not as yet offered a definite clarification or consistent usage of such terms necessary to understand what learners are doing when they are learning a language as *strategy, technique, tactics, plan, operation, process*, or even *skill* or *principle.* In fact, "strategies" have been referred to as "learning skills, basic skills, functional skills", "potentially conscious plans", "consciously employed operations", "cognitive abilities", "cognitive activities", "language processing strategies", "techniques", "tactics", or "problem-solving procedures" (Wenden, 1987:7). Thus, the task of arriving at a common definition and a unified classification of L2 learner strategies seems complicated; different researchers propose differing views as to their defining criteria, while the complex and elusive nature of learner strategies, and imperfect research methods still produce some conceptual and terminological problems.

Nevertheless, practitioners are likely to appreciate the work of Rebecca Oxford (1990). Oxford develops her own definition and classification of language learning strategies on the assumption that their goal is to develop the learner's communicative competence. She derives the term from the ancient Greek word *strategia* which means generalship, or the art of war. If applied to learning situations, the concept involves "a plan, step, or conscious action toward achievement of an objective" and learning strategies can be defined as "operations employed by the learner to aid the acquisition, storage, retrieval, and use of information" ; in fact, they are "specific actions taken by the learner to make learning easier, faster, more enjoyable, more self-directed, more effective, and more transferable to new situations" (Oxford, 1990:8). Thus, strategies constitute learner tools for self-regulated learning (Oxford, 2002; Dornyei, 2005). Oxford's 1990 typology is, in fact, detailed, more comprehensive and systematic than earlier classifications (e.g. Bialystok, 1978; Rubin, 1981; O'Malley *et al.*, 1985, 1990), and, which is of special importance to teachers, less complicated terminologically, as the author herself stresses.

Oxford, like Rubin (1981), divides strategies into two main classes: *direct* and *indirect*, though she proposes a different further subdivision into six strategy groups. The first major class of *direct strategies* includes *memory, cognitive,* and *compensation strategies*. The second class of *indirect strategies* covers *metacognitive, affective,* and *social strategies.* Direct strategies, like O'Malley *et al.*'s (1985) cognitive strategies, involve the target language directly and require its mental processing, while indirect strategies support language learning indirectly through centering, arranging, planning, organizing, controlling and evaluating one's learning; lowering anxiety, encouraging oneself, increasing cooperation and empathizing with others. Thus, they correspond to O'Malley *et al.*'s metacognitive and socio-affective strategies. In fact, direct and indirect strategies support each other, and the six strategy groups can assist one another.

Each of Oxford's 1990 strategy groups performs specific functions in L2/FL learning:

(1) *memory strategies* assist learners with storing and retrieving information via, for example, grouping, associating/elaborating, semantic mapping; using keywords, using physical response and/or mechanical techniques, or structured reviewing;

(2) *cognitive strategies* facilitate the learner's comprehension and production of the new language through varied practising techniques (e.g. repeating, practising formally with sounds and writing systems, practising naturalistically, using formulas and patterns), using resources for receiving and sending messages, getting the idea quickly, analyzing contrastively, reasoning deductively, translating, or transferring;

(3) *compensation strategies* enable learners to cope with their L2 knowledge gaps and continue using the language via intelligent guessing and overcoming limitations in speaking and writing (e.g. selecting the topic, coining words, using a circumlocution or synonym, switching to the mother tongue, getting help, using mime or gesture);

(4) *metacognitive strategies* coordinate the process of L2/FL learning and enable the learner to control his/her cognition through overviewing and linking new data with the already known material, paying attention, finding out about language learning, setting goals and objectives, organizing, monitoring, or evaluating one's learning;

(5) *affective strategies* help to regulate emotions and motivations by skillful application of progressive relaxation or deep breathing, making positive statements, taking risks wisely, listening to one's body, writing a language learning diary, sharing feelings;

(6) *social strategies* intensify contacts and learning with others via, for example, asking questions for clarification, verification, or correction; cooperating with peers and

proficient users of the target language, developing cultural understanding and awareness of others' thoughts and feelings (for details, see Oxford, 1990).

What is crucial to all practitioners is the fact that - when compared to other researchers' proposals - Oxford goes far beyond cognitive and metacognitive processes and thus considerably enriches the concept of language learning strategies. She emphasizes the interrelatedness and interdependence of cognition and the language learner's emotional self – an issue that cannot be neglected in any discussion of learner strategies, and offers a variety of affective and social strategies. As the author rightly stresses, the learner cannot be seen merely as "a cognitive/metacognitive information-processing machine", but must be treated as a 'whole person' – an intellectual, social, emotional, and physical being (Oxford, 2002:128). Additionally, her taxonomy is conveniently related to a practical paper-and-pencil questionnaire designed to assess the learner's current strategy use, *The Strategy Inventory of Language Learning (SILL)* (see Oxford, 1990:283-300).

It must be added that, as can be seen from the list above, and which Ellis (1994) stresses as a shortcoming, Oxford does not separate communication strategies, or strategies of language use, from learning strategies. Instead, she attempts to provide an extended system of all learner strategies and includes her own, reduced list of behaviours that other researchers would call 'communication strategies', locating them among the direct strategies, under the label of *compensation strategies*. However, Oxford does not refrain from admitting that future assessments of learner strategies through surveys such as *SILL* should reconsider Ellis's (1994) and Cohen's (1998) division into *strategies for language learning* and *strategies for language use* (see Hsiao and Oxford, 2002).

The age factor and its role in language learners' use of strategies

Age, as a general factor easy to identify and measure, is probably the most reliably evidenced individual variable described in the SLA literature. Learner age appears not to change developmental patterns concerning the route of language acquisition by both children and adults; however, it influences the rate of learning, ultimate levels of L2/FL proficiency, and language learning success (Ellis, 1994). Since age is a constitutive human property that determines stages of our cognitive, emotional, social, linguistic and communicative development throughout life, it governs what learners in particular age groups become cognitively and communicatively ready to do (Dakowska, 2005). Therefore, age may

influence the learner's choice of types and ways of application of strategies for language learning and use (Oxford, 1989; Oxford and Ehrman, 1993).

Research, though not abundant and mainly focused on the activation of strategies by adolescents and adults, shows that learners at different age groups employ different strategies. This conclusion can be drawn referring to developmental psychology and the research which indicates that adolescents can learn most rapidly of all age groups (Ellis, 1994). On the one hand, teenagers still acquire language like children, that is, naturally and spontaneously, while, on the other hand, the development of Piagetian formal operations and meta-awareness facilitates language learning through better organizational and planning skills and, thus, richer repertoires of strategies that are not yet available to children, and which enable adolescents to learn more consciously.

Furthermore, adolescents' memory span, memory organization, and memory strategies are also superior. Teenagers develop the ability to generate grammatical rules, make associations, cope in formal learning situations, and handle tests by increasingly more appropriate use of a widening range of testing techniques (Arabski, 1984). Additionally, Sternberg (1995) notices that age appears to affect the development of thinking and learning styles, and research shows that learning styles and learner strategies are closely interrelated (Oxford, 1989; 1990; 2002). All these facts testify to adolescent, and later adult, use of a considerably richer range of strategies of all categories that are not yet accessible to children (i.e. memory, cognitive, metacognitive, affective, and social). Obviously, the question of whether particular strategies are applied by an individual, which strategy types he/she uses, when, how, and how many of them, is another issue.

Wong-Fillmore, in her 1976 study of how five Mexican children were developing communicative competence in English, finds that younger learners rely on certain types of strategies more than on others. She shows that children, in their early stages of language development, actively employ social strategies that ensure peer acceptance, and help initiate and maintain social relations with native-speakers. They also seem not to be concerned about language learning itself, though in order to satisfy their social needs they activate some simple cognitive strategies as well (e.g. using formulas or repetitions). Thus, their strategy choices tend to be directed by their specific needs to join a group and become accepted, as well as rely on others' help (Skehan, 1989).

Chesterfield and Chesterfield's (1985) investigation of longitudinal development of young children's strategies in their early stages of L2 development in bilingual settings further supports the observation that strategies for interpersonal interaction play a vital role in child

strategy repertoires. Moreover, it confirms that age *is* a determining factor in the L2 learner's development of strategies, and in their use. Analyses of changes in patterns of strategy use, which accompany the growth of learner L2 knowledge, reveal the existence of a kind of systematic and natural order in strategy emergence and development, although individual strategy variations occur as well. Thus, receptive and self-contained strategies that do not necessitate further social interaction have been found to prevail at the beginning of L2 learning (e.g. memorization, using formulas, repetition). With L2 advancement, more interaction-oriented strategies appear, which allows learners to initiate and maintain conversations, and do so more skillfully (e.g. verbal attention getting, appeal for assistance, asking for clarification, role-play). Finally, the emergence of elaboration and monitoring testifies to growing metacognitive awareness and abilities to study the language itself, though in Chesterfield and Chesterfield's research these strategies were evident in the case of only a few children.

Thus, age and increasing proficiency seem to be related to the widening of repertoires of learning strategies, which are, moreover, used in more sophisticated and demanding ways; the growth in number and rising complexity of strategies employed by learners with age appears closely linked to their cognitive development. This explains the fact that memorization and other strategies which deal with simple language units directly are activated at an earlier age than elaborate processing-based strategies, and strategies indicating learner grammatical error awareness and monitoring (Chesterfield and Chesterfield, 1985; cf. Dakowska, 2005). Last but not least, Brown (2000) mentions Krashen's 1977 claims that adults tend to use monitoring, or strategies for learning, more often and thus consciously attend to language forms, whereas children employ spontaneous strategies of acquisition and subconsciously attach importance to functions, which also seems to conform to Chesterfield and Chesterfield's (1985) findings.

Ellis (1994) adds that young children tend to activate strategies in a task-specific manner, while older children and adults use more generalized strategies and apply them more flexibly. In fact, human development from childhood, through adolescence, into adulthood, within its different aspects – cognitive, social, and physical - implies movements from "rigidity to flexibility", which, in the cognitive aspect, concerns the growth of human skills, plans and strategies (Dakowska, 1995:105). Also, as Bialystok (1990) stresses, personal experience, which builds with age, determines the degree of effectiveness of strategies employed on particular occasions. She confirms that adults vary their strategy choices more freely and

display more flexibility in strategy selection. In her study, those who spoke at least three languages and travelled extensively were the best strategy users. Additionally, research shows that young learners make greater use of such simple strategies as rote learning in particular (e.g. rote repetition as a strategy of rehearsal), while more mature students employ more complex and sophisticated strategies (Ellis, 1994); in fact, children and adults differ in their activation of memory strategies and metaprocesses (Dakowska, 1995). Finally, as Rubin (1975) clarifies, children adapt better to new situations, act out and, as a result, perform better, while adults have a greater guessing potential grounded in their metalinguistic knowledge.

These findings conform to the facts presented earlier and may explain why teenagers and adults learn grammar and vocabulary much faster than children. The former seem to take advantage of their more advanced cognitive abilities, longer attention spans, abstract thinking, richer experience, and thus better developed strategy repertoires, more complex learning strategies, and more flexible strategy use. Children may not be so fast because they do not yet possess the same abilities or strategy sets as older learners, and tend to activate the strategies they do posses in specific ways – basically in response to immediate social needs. As Szulc-Kurpaska (2001) notes, in naturalistic and formal settings children tend to resort to transfer, imitation, simplification, overgeneralization; they use the strategy of self-talk, appeal for assistance, switch to the mother tongue, apply formulaic expressions, and show overlearning effects. Children may also be superior at pronunciation at least partly due to the fact that it is not connected with the use of many strategies – in fact, there are rather few of these (Droździał-Szelest, 1997).

As regards pronunciation, Oxford and Ehrman (1995) explain that younger students stand a better chance to attain native-like pronunciation and fluency also because they use increased numbers of communicative practice strategies. Older learners, on the other hand, tend to employ more strategies for analyzing the language system itself. This tendency is linked to their wider world knowledge and the ability to think in the abstract way, which is, moreover, better adjusted to the context of learning. Furthermore, Ellis (1994), referring to Krashen's 1978 views, notes that adults activate communication strategies when the input they receive is not optimal in order to deal with difficulties and lack of the needed knowledge, and they manage to do this with great success. Children's input is simpler, features frequent repetitions, exaggerated intonation, and is accompanied by gestures; therefore, children do not have to behave in strategically-oriented ways of this type. As Oxford and Ehrman (1995:363) conclude:

Advantages of language learners at different ages are attributed to: one or more critical periods for language learning, prior experience in language learning, onset of formal operations, cognitive maturity, kind of input, affective factors, and sociocultural factors.

Children differ considerably from adolescents and adults in these respects and, as a result, activate different strategies in response to their differing needs.

Conclusions

All in all, the role of individual differences in language learning can by no means be ignored in any discussion of the process, its course, and results. Age is a factor that determines learner abilities to cope with different aspects of the L2/FL learning venture by influencing their choice and use of different strategies at different stages of their development. With age, learners tend to develop their repertoires of strategies for language learning and use, following a kind of natural order of strategy emergence. They begin to employ greater numbers of more generalized and more sophisticated, strategies, which become better adjusted to the contexts of their application, and do so more flexibly. Such changes seem to be related to each individual's personal experience and current L2/FL proficiency level, which, in fact, if grow, grow with age as well.

Apart from age, however, there are also many other variables which may influence the learner's choice and patterns of learning strategy activation. Research shows that these comprise a number of cognitive/learning styles and personality traits, learner motivation, attitudes, beliefs, learning goals, sex, nationality, degree of awareness, or task requirements. Therefore, each learner develops his/her own individual set of learning strategies which may lead to ultimate success, provided he/she knows which strategy to employ, when and how to do this. Experts agree that, for varied reasons, within the process of obligatory school education many learners do not succeed in developing sufficiently differentiated sets of efficient strategies for L2 learning and use, and many learners do not even know about such strategies (see, for example, Droździał-Szelest, Nowacka, Porczyńska, 1999). Nevertheless, they also agree that learning strategies are *amenable to change*; they can be taught, learned, and modified, and thus they may become subject to purposeful and explicit learner strategy training.

Summing up the main research results, it seems worth re-emphasizing Oxford's (1990) observation that more mature, more aware, and more linguistically advanced learners tend to be more effective users of learning strategies, which does not remain without its impact on the

process of L2/FL learning and use. In consequence, it seems that well-targeted programmes of purposeful strategy instruction, preferably incorporated within language teaching curricula, or L2/FL teaching-and-learning environments rich in opportunities for strategic experimentation which must be adjusted to learner age-related needs, abilities and individual profiles, may, as Rubin assumed, help less successful learners achieve more by learning how to apply strategies of their more effective peers. Such age-adjusted language-learning-and-strategy-training programmes should, however, focus on and at the right time help learners develop not only different cognitive strategies for L2/FL learning, but also help them gradually expand varied metacognitive means for managing the language learning process, as well as encourage purposeful growth and active use of a range of available affective and social strategies. The last two strategy categories may prove particularly helpful in coping with and, ultimately, succeeding in the complex task of second/foreign language learning.

Abstract

Since the early 1970s, it has been clear that there is neither a single, universal method of foreign language teaching/learning nor a single, unified set of techniques that could guarantee all learners' successful accomplishment of the complex task of language learning. Learners are different and, therefore, even the most thoroughly planned and well designed syllabuses or learning agendas cannot prove fully effective if we ignore the crucial issue of *individual learner differences*. Apart from the age factor, which determines human cognitive, linguistic, social, and emotional development, there are many other individual variables which seem to influence the learning process and its outcomes. These comprise the learner's cognitive/learning styles and personality traits as well as his/her repertoire of strategies for language learning and use. In this series of three articles, the author presents an overview of research studies which show correlations between selected cognitive as well as affective factors and the learner's individual choice and use of learning strategies. She also discusses implications for foreign language teaching/learning, focusing on the idea of learner strategy training.

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Dominik Dąbrowski

MOTOR CAPABILITIES OF CHILDREN AND ADOLESCENTS WITH DYSFUNCTIONS OF THE HEARING ORGAN ORIGINATING FROM AREAS OF EASTERN POLAND

Key words: motor capabilities, the disabled, children and adolescents

Introduction

Next to the speech, motion is the most commonly exploited and versatile tool in the contact of a man with the surrounding world (Osiński 2003). Raczek (1989) adds that motor capability serves a special function in the area of physical culture, since for the experts of physical culture it is not only one of the major functions of a live organism, an element of its personality as well as a specific object of investigations, but also the primary area of their activity.

The concept of physical fitness is, usually, linked not only with the function of a motor apparatus, but with the biological actions of the entire organism. It is based on specified predispositions and functions of an organism, while from the perspective of symptoms – it is manifested in specified motor effects of body build correctness as well as in individual physical activity. The physical fitness is claimed to be composed not only from the mastered physical exercises, but also from the effectiveness of all organs and systems, motor capabilities (strength, speed, endurance and coordination skills) and even from some elements of an active lifestyle (Osiński 2003).

A highly physically fit person is claimed to be the one who is characterized by a relatively large number of mastered physical exercises, a high effectiveness of the circulatory system, respiration, secretion and thermo-regulation, as well as by some regularities in body build and a lifestyle that affirms the physical activity (Osiński 1991).

Authors usually emphasize a wide context and inaccuracy of that concept, both resulting from the fact that motor behavior is not an isolated function of a motor organ but is linked with the action of the entire personality. The motor capabilities are strongly integrated with emotions, will, cognitive skills and character traits. The term "psychomotor capability",

functioning in the psychological literature, emphasizes strongly the occurring organic unity (Osiński 2003).

The development of motor fitness proceeds based on the morphological, physiological and psychical development. The motor capabilities of a child are manifested in its movements characterized by various purpose and intensity. Each external stimulus is processed into motion. A child changes the object of interests easily and does not devote much time to one activity. Diversified motor activity of a child, manifested most of all in the play, determines the successive development of the psyche and accelerates processes of environment recognition (Czaplicki 1995).

Over the years, multiple trials have been undertaken to interpret the definition of physical fitness. The concept of physical fitness introduced by experts of the World Health Organization in 1986 assumed that the fitness means "the capability for effective performance of muscle work" (Wolański, Parizkova 1976). Literature data refer also to such terms as: motor fitness and motion fitness (Gilewicz 1964, Denisiuk, Milicer 1969, Przewęda 1981).

Contemporarily, the term in force has been adopted as *motor capabilities,* which has also been promoted in the theory of motor activity by foreign authorities (Celikovsky 1972, Grosser 1983, Kasa 1983, Blume 1984) as well as by Polish experts (Raczek 1987, 1988, Raczek, Mynarski 1991, Sankowski 1990, Osiński 1994, Szopa 1994, Szopa, Mleczko, Żak 1996). In the opinion of the latter, the motor activity has two sides, namely: potential side – reflecting the inner capabilities, *i.e.* motor predispositions, capabilities and skills, and the effective side – constituting the result of a given motor activity. Nevertheless, differentiation should be made between motor fitness and physical fitness. Motor capabilities are described as an intermediate floor between the biological basis and motor effect.

Thus, "motor capabilities are a complex of predisposition integrated with a commonly prevailing biological and motor basis, determined by genetic and environmental factors and interacting with one another. Along with motor skills, they constitute the potential side of motor activity, thus determining the state of readiness of an organism for performing various types of motor tasks" (Szopa, Mleczko, Żak 1996). Amongst the motor skills there have been distinguished: strength, speed, and endurance skills as well as specific coordination skills.

In further part of the work, likewise in scientific publications, use will be made of the term: motor capabilities.

Aim

The presented study is aimed at evaluating motor capabilities of children and adolescents with dysfunctions of the hearing organ originating from areas of eastern Poland. Results collected depict, in some part, the current health status of the surveyed subjects, manifested in the effectiveness of the functioning of internal systems and organs, whereas the mean result expressed in a point scale is a general indicator of health status.

The study was diagnostic in character, and the research method applied was a diagnostic survey (Pilch 1995). It was conducted by means of a technique of participant observation (Ryguła 2001), in the form of a questionnaire or an interview questionnaire. The level of motor capability of the subjects was evaluated based on the International Physical Fitness Test (Pilicz *et al.* 2002). Persons with dysfunctions of the hearing organs have no contraindication to perform fitness trials, hence all trials of the test were applied in the study. Results obtained were converted into points according to the binding standards. The scale of points in the test ranged from 0 to 100, and the score of 50 points corresponded to arithmetic means reported for the Polish youth in a given trial. The survey enables evaluating the general level of motor capabilities of the pupils examined. According to guidelines of the test, three levels of motor capabilities were adopted in the study, i.e. high, medium and low. Results obtained were compared with those reported by Przewęda and Dobosz (2003).

The material was elaborated with statistical methods following standard procedures using *STATISTICA* software package. The statistical analysis covered determinations of: arithmetic mean *($\bar{x}$)*, standard deviation *(s)*, standard errors of the arithmetic means *(E_x)*, boundary values of the measured traits, annual increase in a given trait *(d)*, and variability coefficient *(V)*.

The environment of the subjects was characterized by means of percentage distribution of sample size, whereas correlations between the variables were analyzed with the Chi-square test for independent variables as well as based on a correspondence analysis. The strength of correlations between the variables was determined with the Pearson contingency coefficient C.

This publication is only a fragment of investigations conducted since April 2004 till June 2006 and addressing the evaluation of the physical development, motor capabilities and motor activity of children and adolescents in the free time. The study covered 339 pupils, including 185 boys (54.6%) and 154 girls (45.4%) at the age of 8-18 years with complete or partial dysfunction of the hearing organ. Over the experimental period, the subjects were attending to Education and Upbringing Centers in Lublin, Przemyśl and Olecko gathering pupils from elementary school, gymnasium and post-

gymnasium classes. The Centers were taking care over children and adolescents from the following Provinces: Podkarpackie, Lubelskie, Podlaskie as well as Warmia and Mazury. The environment the boys and girls were growing in were, in a similar proportion, the country (59.6%) and the city (40.4%). In majority of cases, the surveyed subjects were persons with residual hearing, i.e. with amblyacousia (51.9%), and deaf persons (48.1%). As it results from analyses, most of the subjects (61.9%) were deaf from birth (*i.e.* suffered from the so-called "congenital deafness"), whereas amongst the others (38.1%) the loss of audition occurred after the period of intrauterine life. The problem of audition impairment amongst the closest family members was declared by 37.2% of the respondents, whereas that problem was not reported by 62.8% of the respondents.

The family structure of the surveyed boys and girls was as follows: 79.0% of the subjects had complete families, 11.8% indicated an incomplete family, 4.7% were living in broken families, whereas 2.4% in foster families and 2.1% in reconstituted families. No statistically significant correlation was found between the place of living and family structure of the respondents (p=0.51).

The educational status of parents of the surveyed pupils was as follows: 20.6% of mothers and 22.1% of fathers had elementary education, 50.4% of mothers and 57.8% of fathers had occupational education, whereas 24.8% of mothers and 15.6% of fathers had secondary education. The least numerous group was constituted by parents with higher education, i.e. 4.2% of mothers and 4.5% of fathers. No statistically significant correlation was found either between the place of living and educational status of both parents (p=0.43 and p=0.06).

The respondents evaluated that living standards they were growing in were usually good (43.1%) and average (34.2%). Very poor social and living conditions were declared by 13.0%, whereas very good ones – by as little as 9.7% of the respondents. In this case also no statistically significant correlation was found between the place of living and living standards of a family (p=0.46). In turn, calculations demonstrated a statistically significant (p<0.01) correlation between the educational status of parents and the living standards of a family. The coefficient of contingency for that correlation accounted for 0.41 in the mothers and for 0.34 in the fathers. The correspondence analysis demonstrated that the respondents whose parents had higher and secondary education assessed the living standards of their family as very good and good, whereas those whose parents had elementary and occupational education evaluated their living standards as insufficient and average.

Analysis of results

Numerical characteristics of changes proceeding in the hand grip strength of the surveyed boys and girls were presented in Tables 1-2. In the case of boys, the average values of hand grip strength ranged from 15.90 kG in the 8-year-olds to 46.45 kG in the 18-year-olds. The greatest increase in the level of that capability between age groups was noted in the boys at 12 years of age (6.71 kG). In turn, in the case of girls, the mean value of hand grip strength ranged from 8.75 kG in the 8-year-olds to 28.33 in the 18-year-olds. The highest increase in the level of that trait between age groups was reported in the girls at the age of 11 years (5.82 kG).

Tab. 1. Hand grip strength of the boys with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	15.90	1.12	3.54	22.26	10-20	-
9	14.40	1.76	5.56	38.61	4-18	-1.50
10	18.11	0.68	2.03	11.21	15-20	3.71
11	19.60	1.00	3.88	19.80	14-30	1.49
12	26.31	2.08	7.48	28.43	18-42	6.71
13	29.86	1.91	8.96	30.01	16-46	3.55
14	34.09	1.54	7.06	20.71	18-43	4.23
15	34.36	1.65	7.72	22.47	21-48	0.27
16	40.12	2.30	9.48	23.63	28-70	5.76
17	45.36	5.01	16.64	36.68	16-64	5.24
18	46.45	1.57	8.89	19.14	32-70	1.09

Tab. 2. Hand grip strength of the girls with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	8.75	2.11	5.95	68.00	2-14	-
9	12.25	2.89	8.17	66.69	2-20	3.50
10	12.00	2.59	6.83	56.92	2-16	-0.25
11	17.82	1.47	6.04	33.89	3-28	5.82
12	19.38	2.14	7.71	39.78	5-34	1.56
13	24.67	1.38	4.77	19.34	16-34	5.29
14	25.60	1.57	4.97	19.41	16-32	0.93
15	25.60	2.22	7.04	27.50	16-36	0.00
16	26.00	1.38	5.68	21.85	16-38	0.40
17	26.09	1.08	4.96	19.01	18-40	0.09
18	28.33	1.25	5.32	18.78	22-40	2.24

The average values of arm strength of the boys analyzed based on the measurement of a flexed-arm hang (Tab. 3), ranged from 29.37 s in the 8-year-olds to 36.00 s in the 10-year-olds. The greatest increase in the level of that capability was noted at the age of 9 years (5.92 s). The analysis of arm strength based on the number of arm flexures in a hang (Tab. 4) demonstrated that it ranged from 3.77 in boys at the age of 12 to 7.47 in boys at the age of 16 years. The highest increase in arm strength level was observed in boys at the age of 14 (1.48). Mean values of arm strength of the girls (Tab. 5) obtained in a trial of the flexed-arm hang fluctuated between 11.73 s in the 18-year-old girls to 31.19 s in the 10-year-old girls. The greatest difference between the age groups in the level of arm strength was noted in the girls at the age of 11 years (10.54 s).

Tab. 3. Functional strength of arms of the boys with dysfunctions of the hearing organ (flexed-arm hang).

Age	$\bar{x}$	E_X	s	V	Ranges of variability	d
8	29.37	5.32	16.81	57.24	10.42-59.00	-
9	35.29	6.79	21.45	60.78	5-65	5.92
10	36.00	8.14	24.42	67.83	6-63	0.71
11	32.87	5.01	19.40	59.02	9-85	-3.13

Tab. 4. Functional strength of arms of the boys with dysfunctions of the hearing organ (flexures of arms in a hang).

Age	$\bar{x}$	E_X	s	V	Ranges of variability	d
12	3.77	0.74	2.68	71.09	1-10	-
13	4.28	0.65	3.03	70.79	1-10	0.51
14	5.76	0.88	4.02	69.79	1-13	1.48
15	6.86	0.78	3.68	53.64	1-12	1.10
16	7.47	1.22	5.01	67.07	2-18	0.61
17	7.09	1.01	3.36	47.39	2-15	-0.38
18	6.77	0.56	3.16	46.68	1-19	-0.32

The average values of trunk strength reported for the boys (Tab. 6) ranged from 13.05 in the 9-year-olds to 23.06 in the 18-year-olds. The greatest increase in the level of that capability was reported in boys at the age of 12 (3.34). In turn, the mean values of trunk strength determined for the girls (Tab. 7) ranged from 10.75 in the 8-year-olds to 18.30 in the 14-year-olds. The highest increase in the level of that trait was reported in girls at the age of 11 (2.14).

Tab. 5. Functional strength of arms of the girls with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	16.11	5.04	14.22	88.27	2-41	-
9	20.88	4.55	12.82	61.40	4-34	4.77
10	31.19	7.58	20.01	64.16	4.05-55.27	10.31
11	20.65	3.08	12.71	61.55	5-47	-10.54
12	16.44	4.83	17.39	105.78	1-47	-4.21
13	22.92	5.88	20.35	88.79	3-74	6.48
14	12.66	1.59	5.03	39.73	4-20.12	-10.26
15	17.36	4.90	15.50	89.29	1-43.67	4.70
16	13.97	2.29	9.46	67.72	1-41	-3.39
17	16.37	2.99	13.68	83.57	1-53	2.40
18	11.73	1.79	7.58	64.62	1-23	-4.64

Tab. 6. Trunk strength of the boys with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	14.30	0.94	2.98	20.84	9-18	-
9	13.05	0.83	2.63	20.15	6-15	-1.25
10	16.33	0.91	2.74	16.78	13-20	3.28
11	18.27	0.78	3.03	16.58	13-21	1.94
12	21.61	0.56	2.02	9.35	20-25	3.34
13	19.64	1.04	4.88	24.85	4-24	-1.97
14	22.71	0.85	3.90	17.17	15-30	3.07
15	21.04	0.75	3.54	16.83	13-26	-1.67
16	21.35	0.97	4.01	18.78	17-28	0.31
17	19.91	1.62	5.37	26.97	14-29	-1.44
18	23.06	0.79	4.51	19.56	14-33	3.15

Mean values of body suppleness of the boys (Tab. 8) ranged from 0.77 cm in the 13-year-olds to 5.84 cm in the 18-year-olds. The greatest difference in suppleness level between the age groups compared was reported in the boys at the age of 18 (4.57 cm). In turn, in the case of girls, the mean values of that capability (Tab. 9) ranged from 0.50 cm in the 8-year-olds to 8.22 cm in the 18-year-olds. The greatest difference in suppleness level was noted in the girls at the age of 18 (5.17 cm).

Tab. 7. Trunk strength of the girls with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	10.75	1.15	3.24	30.14	7-15	-
9	12.50	0.89	2.51	20.08	9-16	1.75
10	14.57	0.20	0.53	3.64	14-15	2.07
11	16.71	0.97	4.01	24.00	11-27	2.14
12	15.23	1.13	4.08	26.79	6-20	-1.48
13	16.67	0.95	3.28	19.68	12-23	1.44
14	18.30	0.77	2.45	13.39	13-21	1.63
15	17.60	0.70	2.22	12.61	14-21	-0.70
16	17.94	0.89	3.68	20.51	13-24	0.34
17	16.71	0.72	3.30	19.75	10-26	-1.23
18	14.72	0.94	3.99	27.11	6-22	-1.99

Tab. 8. Body suppleness of the boys with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	3.35	1.35	4.28	127.76	-2-12	-
9	1.60	0.95	3.02	188.75	-3-5	-1.75
10	4.33	0.62	1.87	43.19	2-8	2.73
11	4.93	0.91	3.53	71.60	-1-10	0.60
12	1.92	1.68	6.04	314.58	-3-15	-3.01
13	0.77	2.20	10.33	1341.56	-23-10	-1.15
14	2.83	0.94	4.31	152.30	-5-9	2.06
15	3.04	1.39	6.53	214.80	-16-13.5	0.21
16	2.03	2.48	10.23	503.94	-25-17	-1.01
17	1.27	2.88	9.59	755.12	-13-10	-0.76
18	5.84	1.54	8.71	149.14	-19-21	4.57

Tab. 9. Body suppleness of the girls with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	0.50	1.05	2.97	594.00	-4-4	-
9	3.25	2.33	6.58	202.46	-4-12	2.75
10	4.28	0.18	0.48	11.21	4-5	1.03
11	4.35	0.83	3.42	78.62	-2-10	0.07
12	2.23	2.23	8.03	360.09	-14-10	-2.12
13	1.66	1.65	5.72	344.58	-9-9	-0.57
14	4.50	1.99	6.29	139.78	-9-11	2.84
15	3.40	1.71	5.42	159.41	-4-10	-1.10
16	2.17	1.30	5.37	247.47	-9-10	-1.23
17	3.05	2.23	10.24	335.74	-13-20	0.88
18	8.22	1.16	4.91	59.73	-3-16	5.17

The average scores noted in the long jump trial in boys (Tab. 10) ranged from 103.00 cm in the 9-year-olds to 198.54 cm in the 18-year-olds. The greatest increase in the level of that ability was noted in the boys aged 18 years (36.00 cm). The mean results obtained in that trial by the girls (Tab. 11) fluctuated between 82.63 cm in the 9-year-olds to 138.59 cm in the 16-year-olds. The greatest increase in the level of that ability was found in the girls at the age of 11 (22.88 cm).

Tab. 10. Results of standing long jump achieved by the boys with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	109.60	5.03	15.91	14.52	80-135	-
9	103.00	5.64	17.84	17.32	74-120	-6.60
10	116.56	5.14	15.43	13.24	98-135	13.56
11	128.40	6.65	25.76	20.06	75-180	11.84
12	148.61	7.07	25.47	17.14	122-200	20.21
13	143.00	6.25	29.32	20.50	90-200	-5.61
14	164.67	5.75	26.36	16.01	110-208	21.67
15	158.95	5.29	24.81	15.61	105-198	-5.72
16	163.47	10.52	43.36	26.52	100-245	4.52
17	162.54	9.78	32.48	19.98	96-210	-0.93
18	198.54	5.04	28.56	14.39	131-230	36.00

Tab. 11. Results of standing long jump achieved by the girls with dysfunctions of the hearing organ.

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	88.00	5.96	16.81	19.10	70-110	-
9	82.63	5.71	16.11	19.50	60-100	-5.37
10	92.00	4.41	11.64	12.65	75-100	9.37
11	114.88	4.84	19.96	17.37	80-161	22.88
12	112.76	5.66	20.39	18.08	60-132	-2.12
13	126.42	4.15	14.36	11.36	91-150	13.66
14	127.00	4.95	15.63	12.31	100-152	0.58
15	138.30	6.31	19.93	14.41	85-152	11.30
16	138.59	7.11	29.29	21.13	83-182	0.29
17	135.09	4.27	19.54	14.46	97-163	-3.50
18	137.27	5.63	23.87	17.39	100-170	2.18

In the speed test, the mean results achieved by the boys (Tab. 12) ranged from 7.97 s in the 18-year-olds to 11.30 s in the 9-year-olds. The greatest increase in speed level between the age groups was noted for the boys at the

age of 11 (-0.62 s). In contrast, the mean results scored in the speed test by the girls (Tab. 13) fluctuated between 9.42 s in the 16-year-olds to 13.09 s in the 9-year-olds. The greatest increase in the level of that ability was noted in the 10-year-old girls (-1.35 s).

Tab.12. Results of a speed trial achieved by the boys with dysfunctions of the hearing organ (50 m run).

Age	$\bar{x}$	E_X	s	V	Ranges of variability	d
8	10.88	0.33	1.05	9.65	9.62-12.84	-
9	11.30	0.74	2.33	20.62	9.47-17.22	0.42
10	10.71	0.33	0.98	9.15	9.43-11.79	-0.59
11	10.09	0.42	1.62	16.06	6.71-14.22	-0.62
12	9.45	0.25	0.92	9.74	8.13-10.75	-0.64
13	9.18	0.22	1.03	11.22	7.99-11.37	-0.27
14	8.63	0.18	0.82	9.50	7.66-10.55	-0.55
15	8.86	0.30	1.41	15.91	7.60-13.41	0.23
16	8.02	0.21	0.86	10.72	6.78-9.93	-0.84
17	8.46	0.35	1.18	13.95	7.09-11.00	0.44
18	7.97	0.09	0.55	6.90	6.72-9.10	-0.49

Tab. 13. Results of a speed trial achieved by the girls with dysfunctions of the hearing organ (50 m run).

Age	$\bar{x}$	E_X	s	V	Ranges of variability	d
8	12.92	0.45	1.27	9.83	11.17-14.14	-
9	13.09	1.07	3.01	22.99	11.04-18.55	0.17
10	12.06	0.69	1.83	15.17	9.64-14.1	-1.03
11	10.71	0.22	0.91	8.50	9.34-12.52	-1.35
12	10.81	0.42	1.50	13.88	8.59-13.1	0.10
13	9.86	0.19	0.67	6.80	8.39-11.2	-0.95
14	9.67	0.26	0.82	8.48	8.47-11.17	-0.19
15	9.47	0.26	0.82	8.66	8.55-11.23	-0.20
16	9.42	0.17	0.71	7.54	8.18-10.38	-0.05
17	9.47	0.14	0.63	6.65	8.56-10.62	0.05
18	9.61	0.09	0.41	4.27	8.9-10.47	0.14

Changes proceeding in agility of the surveyed boys and girls were evaluated based on results of a shuttle run presented in Tab. 14-15. The average results achieved in the agility trial by the boys ranged from 10.98 s in the 18-year-olds to 16.29 s in the 9-year-olds. The highest increase in the level of that capability was reported in the 12-year-old boys (-2.33 s). The mean results scored in that trial by the girls ranged from 13.09 s in the 18-year-olds

to 17.90 s in the 10-year-olds, with the highest increase in the level of that trait observed for the girls at the age of 11 (-2.23 s).

Tab. 14. Agility of the boys with dysfunctions of the hearing organ (4x10 m shuttle run).

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	15.13	0.68	2.16	14.28	12.37-18.58	-
9	16.29	0.42	1.33	8.16	15.42-18.56	1.16
10	14.72	0.26	0.78	5.30	13.12-15.77	-1.57
11	15.08	0.83	3.21	21.29	11.87-24.00	0.36
12	12.75	0.41	1.47	11.53	10.28-14.37	-2.33
13	13.06	0.35	1.64	12.56	10.75-16.20	0.31
14	12.34	0.37	1.68	13.61	9.91-16.6	-0.72
15	12.29	0.41	1.94	15.79	10.28-19.13	-0.05
16	11.77	0.36	1.48	12.57	9.59-15.72	-0.52
17	12.69	0.63	2.11	16.63	9.53-15.45	0.92
18	10.98	0.15	0.88	8.01	9.18-12.60	-1.71

Tab.15. Agility of the girls with dysfunctions of the hearing organ (4x10 m shuttle run).

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
8	16.73	0.51	1.43	8.55	14.37-18.3	-
9	17.64	0.40	1.14	6.46	16.63-20.29	0.91
10	17.90	1.01	2.68	14.97	15.74-21.68	0.26
11	15.67	0.39	1.62	10.34	11.84-17.20	-2.23
12	15.78	0.76	2.73	17.30	11.22-21.1	0.11
13	13.67	0.32	1.11	8.12	12.22-16.7	-2.11
14	13.61	0.26	0.83	6.10	12.3-14.88	-0.06
15	13.21	0.39	1.24	9.39	12.39-16.4	-0.40
16	13.76	0.45	1.85	13.44	10.78-16.5	0.55
17	13.48	0.25	1.16	8.61	11.75-15.59	-0.28
18	13.09	0.29	1.25	9.55	11.87-15.88	-0.39

The average values of boys stamina (Tab. 16) analyzed based on the 600 m extended run trial ranged from 183.34 s in the 11-year-olds to 199.24 s in the 10-year-olds. The greatest increase in the level of stamina was noted in the 11-year-old boys (-15.90 s). In turn, the analysis conducted based on the 1000 m extended run demonstrated the mean values of 279.54 s in the 16-year-olds to 345.80 s in the 13-year-olds. Amongst the age groups analyzed,

the greatest increase in stamina level was reported for 14-year-old boys (-50.67 s).

Tab. 16. Stamina of the boys with dysfunctions of the hearing organ (extended run).

Age	$\bar{x}$	E_X	s	V	Ranges of variability	d
			600 m run			
8	195.20	8.24	26.05	13.35	162-260	-
9	199.00	15.40	48.68	24.46	164-290	3.80
10	199.24	10.99	32.99	16.56	161-244	0.24
11	183.34	9.42	36.49	19.90	138.6-252	-15.90
			1000 m run			
12	312.89	11.79	42.47	13.57	248-371.4	-
13	345.80	12.61	59.14	17.10	234-412	32.91
14	295.13	12.31	56.38	19.10	222-388.2	-50.67
15	316.25	19.19	90.02	28.46	221-570	21.12
16	279.54	15.93	65.64	23.48	206-482	-36.71
17	304.78	13.44	44.62	14.64	255-366.6	25.24
18	297.74	7.45	42.26	14.19	201-342	-7.04

In the case of the girls, the mean level of stamina (Tab. 17) analyzed based on a 600 m extended run ranged from 218.15 s in the 9-year-olds to 264.83 s in the 11-year-olds. The greatest difference in stamina level was observed in the girls at the age of 11 (43.97 s). In turn, the analysis conducted based on the 800 m extended run showed the mean results scored by the girls to range from 247.66 s in the 13-year-olds to 292.08 s in the 17-year-olds. The greatest increase in the level of that trait was noted in the girls at the age of 13 (-30.03 s).

The general level of motor capabilities of the boys with dysfunctions of the hearing organ (Fig. 1) was acknowledge as medium, which has been confirmed by the total score of 43.49 points achieved based on particular trials of the fitness test. The surveyed boys achieved the highest scores in the trials of: functional strength of arms, hand grip strength and body suppleness. Results of the other trials of the fitness test were at a low level. The lowest results were reported in the trials of: standing long jump, stamina and agility.

Tab. 17. Stamina of the girls with dysfunctions of the hearing organ (extended run).

Age	$\overline{x}$	E_X	s	V	Ranges of variability	d
600 m run						
8	254.40	4.34	12.25	4.82	244-269	-
9	218.15	12.71	35.84	16.43	186-274	-36.25
10	220.86	18.28	48.25	21.85	180-290	2.71
11	264.83	16.72	68.88	26.01	156-393	43.97
800 m run						
12	277.69	10.69	38.48	13.86	204-342	-
13	247.66	9.29	33.45	13.51	216-329	-30.03
14	276.16	15.55	53.79	19.48	201-390	28.50
15	264.40	14.98	47.35	17.91	212-340	-11.76
16	274.27	10.29	42.39	15.46	211-346	9.87
17	292.08	11.13	50.97	17.45	192-380	17.81
18	271.21	6.68	28.31	10.44	201-325.2	-20.87

In the case of girls with dysfunctions of the hearing organ (Fig. 2), the level of general motor capabilities was also evaluated as medium based on the score of 41.37 points obtained in the particular trials of the fitness test. Out of the trials preformed, the highest results were achieved by the girls in the functional strength of arms, hand grip strength and body suppleness, whereas the lowest ones – in standing long jump as well as agility and speed trials.

The evaluation of the general level of motor capabilities demonstrated that both girls and boys with dysfunctions of the hearing organ were characterized by the medium level of those capabilities in respect of the Polish standards, which has also been confirmed by results of investigations conducted by other authors. In both cases, the best results were achieved in the static trials, including hand grip strength and functional strength of arms, as well as in a body suppleness trial. In contrast, the worse results were reported in a standing long jump trials and in running trials, including speed, agility and stamina, as well as in a trunk strength trial.

It may thus be concluded that the greatest difference was noted in the trials requiring the appropriate efficiency of an audition analyzer, i.e. those that require a response to a stimulus, which in the case of this study was a signal or sign of starting the trial.
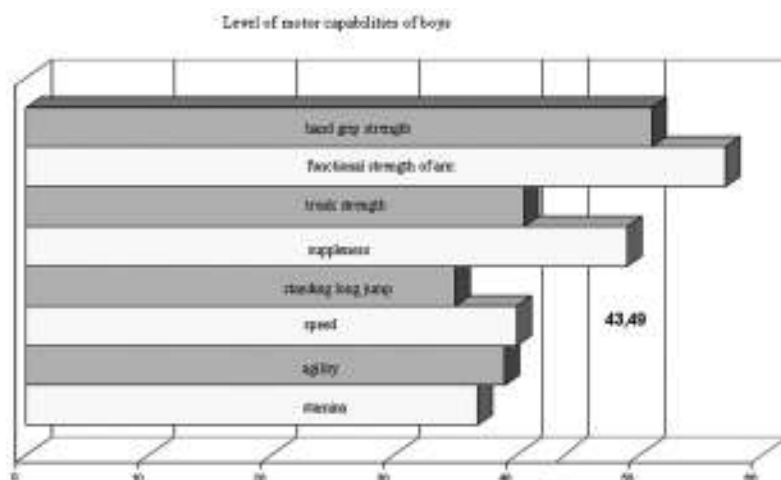
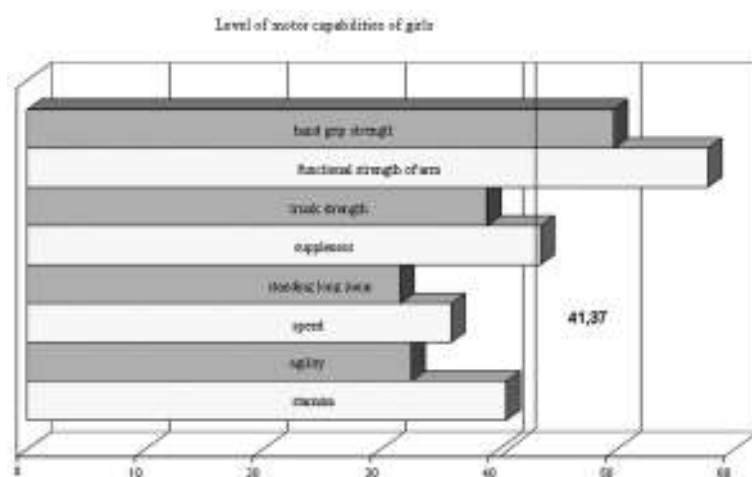**Fig. 1.** Level of motor capabilities in the boys with dysfunctions of the hearing organ (points).

Fig 2. Level of motor capabilities in the girls with dysfunctions of the hearing organ (points).

Conclusions

The analysis of motor capabilities of the surveyed children and adolescents with dysfunctions of the hearing organ enabled formulating the following conclusions:

The general level of motor capabilities in subjects with dysfunctions of the hearing organ, analyzed based on the trials of the International Physical Fitness Test, was evaluated as medium. The analysis of results demonstrated that persons with dysfunctions of the hearing organ reached the highest results in the trials of: hand grip strength, functional strength of arms and body suppleness, whereas the lowest scores – in the trials of: standing long jump, agility as well as in all speed and endurance trials.

Abstract

The work presents results of investigations addressing the evaluation of motor capabilities of children and adolescents with dysfunctions of the hearing organ originating from areas of eastern Poland. Results collected depict, in some part, the current health status of the examined subjects, manifested in the effectiveness of the functioning of internal systems and organs.

The study was diagnostic in character, and the research method applied was a diagnostic survey. It was conducted by means of a technique of participant observation based on a questionnaire and an interview questionnaire. The level of motor capability of the subjects was evaluated based on the International Physical Fitness Test. The survey enabled evaluating the general level of motor capabilities of the pupils examined. According to guidelines of the test, three levels of motor capabilities were adopted in the study, i.e. high, medium and low. Results obtained were compared with results of the nation-wide surveys conducted for children and adolescents.

The protocol of the study was approved by the Bioethics Commission for Scientific Research at the Academy of Physical Education in Katowice (Resolution No. 3/2006 of the 27th of April 2006).

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Marcin Klimek

RESOURCE ALLOCATION ALGORITHMS
FOR ROBUST PROJECT SCHEDULING

Key words: resource allocation, robust project scheduling, resource constraints

Introduction

In recent years, Make-To-Order systems (*MTO*) have been increasingly often applied in production, particularly in manufacturing of custom products for an individual customer, whose requirements are variable and diverse. Each manufacturing order in *MTO* is treated as a separate project, created in consultation with the customer. Projects (undertakings) are carried out, *e.g.* in such domains as research and development, public works, construction works, IT, etc.

Together with the growth of interest in carrying out manufacturing processes according to a project, the need for research concerning project scheduling has emerged. The present study analyses a very useful practical problem of scheduling the project with limited availability of resources, i.e. *RCPSP* (*Resource-Constrained Project Scheduling Problem*).

Project execution is accompanied by uncertainty, related, *e.g.* to the variability of customer's requirements, to difficulty in assessing duration of tasks (particularly of unique or inventive activities), to temporary unavailability of resources (machine failures), *etc*. The effect of interferences in task scheduling can be eliminated, among others, by robust scheduling. A robust schedule is created during the project planning phase, before the project implementation start. It is defined as task scheduling which, due to its properties, is resistant to disruptions that may emerge during production (Jensen 2001). Robustness is also understood as the ability of the schedule to compensate for the effects of insignificant increases in activity durations which may be caused by uncontrolled factors (Al-Fawzan, Haouari 2005). A similar approach is applied in this paper.

The task of robust scheduling is to anticipate productive disruptions in order to minimize the differences between the scheduled completion time and the actual time of project completion (*stability of makespan* approach) and/or in order to minimize changes (*e.g.* concerning task start times or assi-

gnment of resources to activities) in a planned schedule during its execution (*solution robustness* approach).

The RCPSP problem involves two stages of optimization, intended to create a schedule that would be most resistant to disruptions:

1. *robust resource allocation* – proper assignment of resources for execution of individual activities,
2. *robust buffer allocation* – inserting time and resource buffers; buffer allocation usually takes place with established assignment of resources to tasks (Leus 2003) (Leus *et al.* 2004).

This paper presents issues related to allocation of resources to activities and to the effect of this allocation on schedule robustness. It describes a mathematical model of resource allocation, for which robustness metrics – those already known as well as those proposed by the author – are presented.

Formulating the problem

Projects in the *RCPSP* problem are presented in the *AON* network (*Activity On Node*) as an acyclic, uniform, simple directed graph *G(V, E)*, in which *V* is a set of nodes corresponding to activities (tasks, operations), and *E* is a set of arcs that describe order relations between tasks. Set *V* consists of *n* actions, numbered from 1 to *n* in a topological order, *i.e.* the predecessor has a lower number than the successor. Two dummy tasks are included into the project, 0 and *n+1*, of zero duration ($d_0 = d_{n+1} = 0$) and of zero demand for resources, representing, respectively, the initial summit and the final summit of *G(V, E)* graph.

Relations occurring between the tasks are of the *finish-start, zero-lag precedence* type, in which a successor can begin immediately after the end of a predecessor:

$$s_i + d_i \leq s_j, \qquad \forall (i, j) \in E \quad , \tag{1}$$

where:

s_i – time of starting activity *i*,

d_i – time of executing activity *i*.

Task execution requires resources. Their amount is limited, i.e. at any moment of time *t*, consumption of resources does not exceed available amounts:

$$\sum_{i \in A(t)} r_{ik} \leq a_k, \qquad \forall t, \forall k \quad , \tag{2}$$

where:

A(t) – set of tasks performed within the time span *[t-1, t]*,

a_k – amount of available k type resources *(k = 1,..., K; where K* – number of resource types),

r_{ik} – demand of activity i for type k resource.

Resources are *renewable* i.e. their amount is fixed (equal to a_k for each $k = 1,..., K$), regardless the load in previous periods.

Before allocating resources, a nominal schedule is created, which consists in finding times of individual task starts s_0, $s_{1,...}$ s_{n+1}, while satisfying the above specified order and resource constrains. The most frequent optimisation criterion is *makespan* minimization. It involves searching for a schedule of a minimum time to complete the entire project (the time of project execution is equal to the time of beginning a final dummy activity s_{n+1}).

A given nominal schedule can be carried out with many various allocations of resources. Establishing allocation of resources to tasks is a significant issue from the point of view of robustness of a planned schedule. The problem of resource allocation for the *RCPSP* problem has been a subject of many research studies (Leus 2003) (Leus *et al.* 2004) (Deblaere *et al.* 2006) (Policella 2005). It is a strongly *NP*-hard task, even with one type of resources (Leus 2003).

Description of the resource allocation problem applies the notion of *resource flow networks* (Artigues *et al.* 2003). This is a $G(V, E \cup E_R)$ network, containing nodes from the original network of project activities *G(V, E)* and extra arcs (*E_R* set) that join all pairs of nodes (activities) between which flows of resources *f(i, j, k)* (natural numbers) occur for each type of resource k, from activity i coming to an end to activity j which is beginning. The E_R set contains only those arcs which do not occur in original network *G(V, E)*. Constraints for the resource allocation problem can be formulated in the following way (Leus 2003):

– for each type of resources from set *K*, the sum of all resources of a given type, going out of a dummy start activity is equal to the sum of those resources going into a dummy end activity, and amounts to a_k:

$$\sum_{j \in V} f(0, j, k) = \sum_{j \in V} f(j, n+1, k) = a_k \qquad \forall k \in K \quad , \quad (3)$$

– for each type of k resources, a sum of all nodes of a given type going into a given node representing a non-dummy activity is equal to the sum of those resources going out of this node, and amounts to r_{ik}:

$$\sum_{j \in V} f(i, j, k) = \sum_{j \in V} f(j, i, k) = r_{ik} \qquad \forall i \in V \setminus \{0, n+1\}, \forall k \in K \quad ,(4)$$

A given schedule may be realized by various resource flow networks, which may differ in terms of resistance to production disruptions occurring during the production time.

Robust resource allocation

While analysing robust resource allocation, it should be remembered that each increase in the duration of the predecessor results in delaying the start of the successor if the start time of the successor is equal to the end time of the predecessor. Each extra arc in the E_R set is a new precedence constraint, which reduces the robustness of the schedule. Consequently, the problem of resource allocation optimization amounts to the issue of minimizing extra arcs (Policella 2005) (Deblaere *et al.* 2006). Robust allocation algorithms assign activities with precedence relations to be realized by the same resources (Policella 2005) and maximize sums of flows between individual tasks (Leus 2003). The problem of minimizing the number of arcs on the activity network is also solved by integer programming (Deblaere *et al.* 2006).

In order to reduce the span of search, so-called *unavoidable arcs* are looked for at the beginning. Activities *i* and *j* are linked with an (unavoidable) arc in the resource flow network if it is forced by the schedule subject to resource allocation. Such a situation occurs when the number of available resources of a given type *k* (without taking into consideration those resources that realized activity *i*), at the moment of task start *j* ($t = s_j$), is lower than the demand of activity *j* for resources. It can be formally expressed in the following way (Deblaere *et al.* 2006):

$$(i, j) \in E_U \Leftrightarrow \exists k : a_k - \sum_{l \in J_t} r_{lk} - \max(0, r_{ik} - \sum_{m \in M_t} r_{mk}) < r_{jk}$$

$$\forall i, j \in V : s_j \geq s_i + d_i, \quad (i, j) \notin E, \quad (5)$$

where:

E_U – set of inevitable arcs ($E_U \subset E_R$),

J_t – set of tasks which are being executed at the moment of $t = s_j$,

M_t – set of such tasks *m*, for which start times satisfy inequalities $s_j > s_m \geq s_i + d_i$, which at the moment of $t = s_j$ use resources assigned to activity *i*.

Table 1 presents information on a model project which will be used in robust resource analysis.

Tab. 1. Information on tasks in a model project with one resource ($K=1$).

Activity i	Duration d_i	Demand for resource r_i	Direct successors of activity i
0	0	0	1, 2, 3, 5
1	5	9	9
2	2	4	6
3	2	6	4
4	2	3	7
5	3	8	8
6	2	5	8
7	3	2	8
8	2	1	9
9	0	0	none

Fig. 1 presents a schedule with model allocation of resources for the project described in Tab. 1.

a)

b)
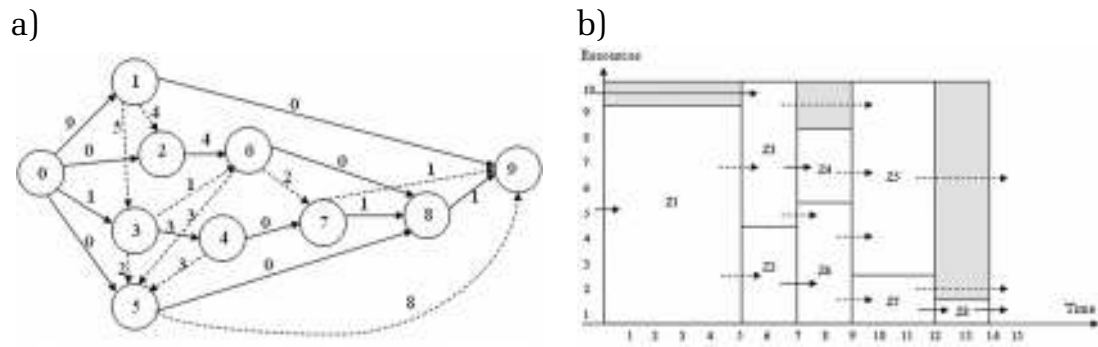
Fig. 1. a) Resource flow network for a model project consisting of eight tasks with indicated (next to the arrows) resource flows *f(i,j)*. Dashed arrows indicate extra arcs, b) Schedule with allocation of resources (with resource flow points indicated by arrows).

Extra arcs (forming the E_R set) are indicated in Figures 1a and 1b with dashed arrows in the resource flow network. For resource flow network in Figure 1a, the E_R set is made of 9 arcs (1.2), (1.3), (3.5), (3.6), (4.5), (5.9), (6.5), (6.7), (7.9). They include the following unavoidable arcs: (1.2), (1.3), (3.6), (4.5), (5.9), (6.5), (7.9). Allocation of resources presented in Figure 1 does not contain a minimum number of arcs. Arcs (3.5) and (6.7) are not unavoidable and can be theoretically removed from the E_R set for different allocation of resources. Elimination of arc (3.5) leads to the creation of an extra arc (3.7), *i.e.* it will not reduce the number of elements in the E_R set. On the other

hand, removal of arc (6.7) is possible; therefore a minimum number of elements in the E_R set is 8.

Fig. 2a and 2b present a model resource flow network with a minimum number of extra arcs.

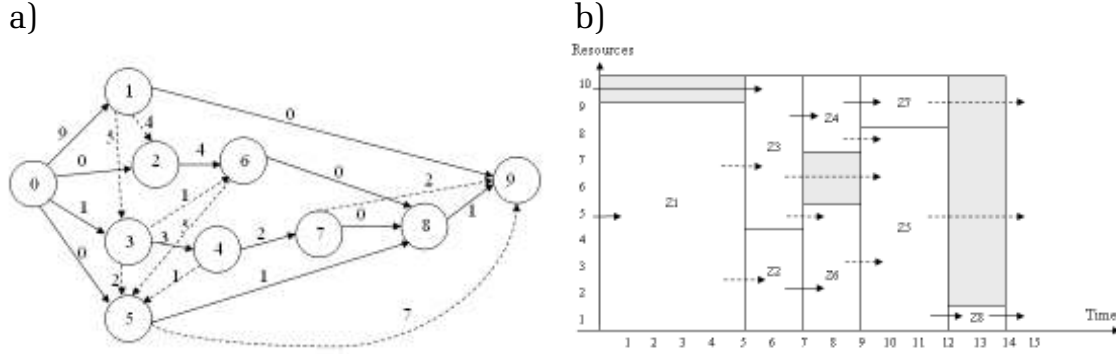a)   b)

Fig. 2. a) Resource flow network,
b) Gantt's schedule with a minimum number of extra arcs.

The lack of resource flow between activities in a direct precedence relation is often an unfavourable solution. In practice, order relations often result from technological conditions. When the same resources work on subsequent activities from the project network, it is easier to account for and to control the progress of the production process. Therefore, resources should be transferred in the first place from the predecessor to the direct successor.

The next chapter presents robustness measures for the robust resource allocation problem. They take into account rules of robust resources allocation described here.

Measures of resource allocation robustness

Assessment of the robustness of resource allocation involves analysing of the resource flow network and strives to minimize changes occurring in the resource flow network $G(V, E \cup E_R)$, as compared to the original network of activities $G(V, E)$. *Flexibility* (*flex*) is used as a measure of robustness for resource allocation (Policella 2005). The value of *flex* depends on the number of pairs of activities in the resource flow network $G(V, E \cup E_R)$, between which no order dependencies occur. For the *RCPSP* problem considered, in which a topological order of tasks and precedence relations of the finish-start, zero-lag precedence occur, *flex* can be calculated as follows:

$$\text{flex} = 1 - \frac{\#(E \cup E_R)}{\dfrac{n \cdot (n-1)}{2}}, \tag{6}$$

where:

$\dfrac{n \cdot (n-1)}{2}$ – number of all possible pairs of activities in the project,

$\#(E \cup E_R)$ – number of arcs in the resource flow network (including extra arcs).

Flexibility indicates what part of tasks is not related by precedence relations. A higher value of *flex* means a lower degree of dependency between tasks, and greater robustness of the schedule. The lack of relationship between two activities is favourable, since a possible delay in ending one activity does not effect the moment of beginning another activity. The problem of maximisation of *flex* indicator is equivalent to the issue of minimizing the number of extra arcs.

Flexibility is a simple measure, but it does not take into account many aspects related to the robustness of scheduling. For a given nominal schedule, there often exist many allocations of resources of the identical value of *flex*, which are more or less susceptible to production disturbances. The *flex* indicator does not allow for, *e.g.* susceptibility to disturbances of individual extra arcs. The author emphasizes that some arcs n the E_R set have lower influence on ranking robustness. These are arcs *(i, j)*, linking activity *i* with activity *j* in situation when resources flow between activity *i* and activity *j*, but those resources are unused for some time. For the example in Fig. 1, this is an arc (3.5), which uses resources 9, 10 that not used in 7-9 time span from (the area filled in grey in Fig. 1b).

A more advanced approach to measure robustness is to establish the effect of prolonging individual activities on production stability. A function of resource allocation becomes then an objective function of reactive scheduling – measurement of stability of a completed schedule. Such an approach is applied, among others, to the *RCPSP* problem with minimization of weighted costs of instability (Deblaere *et al.* 2006). Weighted cost of instability is established experimentally by applying various courses of production, generated on the basis of the statistical knowledge concerning durations of tasks. In each course, task durations are taken at random, each from the β schedule of parameters specified in the experiment.

It has been assumed in this paper that there is no statistical knowledge concerning the variability of tasks duration, *i.e.* prolonging the scheduled duration of each of the tasks is equally probable. Activities are prolonged for reasons that are impossible to establish during the phase of planning, *i.e.*

errors in estimating duration, unfavourable weather conditions, failures, etc. Objective functions for resource allocation are proposed below. They take into account the influence of prolonging individual tasks on production stability, *i.e.* the scope of changes in completed scheduling in relation to the planned one.

A robustness measure proposed by the author is function F_1, calculated according to formula (7) as a sum of time delays in the start of all tasks in relation to the schedule, with the assumption that each of the tasks is prolonged by one time unit.

$$F_1 = \sum_{i=1}^{n+1} (s_i^{all} - s_i),\qquad(7)$$

where:

s_i^{all} – rescheduled time of task i start while prolonging each of the activities by 1.

In order to establish F_1, a modified schedule is created, with the resource flow network $G(V, E \cup E_R)$, taking into consideration changed durations of tasks (for each task $j = 1...n$ duration equals $d_j + 1$). The simplest version of this measure can be the duration of the entire project for a modified schedule, equal to s_{n+1}^{all}.

Another proposed indicator of robustness is function F_2, calculated pursuant to the formula (8) as a sum of the number of rescheduled tasks resulting from delaying each of the activities by one time unit.

$$F_2 = \sum_{j=1}^{n} (\sum_{i=1}^{n+1} (s_i^j - s_i)),\qquad(8)$$

where:

s_i^j – time of task i start while prolonging activity j by 1,

$s_i^j = s_i, \quad \forall (i,j): s_i + d_i \geq s_j$ occur.

The number of delayed tasks (rescheduled by one time unit) while prolonging a given task by 1 is determined with the assumption that other tasks are realized according to the plan. Time shifts are calculated on the basis of the resource flow network $G(V, E \cup E_R)$ analysed.

The schedule of resource allocation with minimal value of F_1 or F_2 is resistant to disturbances. With such an allocation, possible insignificant prolonging of activities reveals the lowest possible effect on the stability of executed scheduling (delay of other tasks). Measures of F_1 and F_2 make it

possible to analyse those properties of schedules that may not be considered in the *flex* indicator.

Summary

This article presents the issue of resource allocation for a Resource-Constrained Project Scheduling Problem. The focus is on determining rules for robust allocation of resources. The article defines criteria of assessing a resource flow network that can be more useful than robustness measures applied so far in research.

The subject of further research will be, *e.g.* development of efficient algorithms of robust resource allocation for proposed measures of robustness.

Abstract

The article presents the problem of robust allocation of resources in a Resource-Constrained Project Scheduling Problem. It discusses the importance of robust scheduling for execution of actual projects.

The issue of resource allocation is analysed for a model project, with indication of allocation principles, which may influence the increase in robustness of the obtained resource allocation network. The author also proposes measures for resource allocation robustness that take into consideration the influence of prolonging individual tasks on the stability of the schedule completed. Those measures make it possible to carry out a more precise analysis concerning the properties of the schedule with resource allocation in terms of its susceptibility to disruption in comparison to a flexibility indicator, *flex*, that has been applied so far in research.

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Elżbieta Jaszczyszyn

IDENTIFICATION AND FORMATION OF ALLITERATIONS VS. THE PRE-SCHOOL PERIOD AND THE MODEL OF READING EDUCATION IMPLEMENTED IN A NURSERY SCHOOL[1]

Key words: alliterations, identification of alliteration, formation of alliterations, reading education of six-year-olds, models of reading education

Introduction

The objective of this manuscript is to present results of a study into the capability of identification and formation of alliterations[2] by six-year-old children taking into account such factors as: the number of years spent in a nursery school and the model of reading education, as well as to analyze potential inter- and intra-group differences.

The capability of reading (and writing) is based on the awareness of the so-called "linguistic structures". A. Maurer (1994, p. 34) pays attention to its indicator – the fact when a child becomes aware of some constituting elements occurring in the stream of speech, that may be operated with. Initially, these are larger elements (sentences, words), and then smaller and smaller ones (syllables, sounds). In addition, a child is gradually discovering that words are composed of elements (syllables and sounds), which do not mean anything alone, but determine the meaning of words.

An important stage of developing phonological competency was also claimed to be the capability of differentiating elements larger than single sounds, yet smaller than syllables (rhymes and alliterations) (Krasowicz, Bogdanowicz, 1996). Owing to the structure, in which the onset (the initial part) is referred to as alliteration and the coda (the terminal part) – as

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[1] They study was financed from funds for science in the years 2007 – 2009 as a research Project (no. 106 4557 33)

[2] Alliteration (Lat. a*d litteram,* to a sound) consists in beginning two or more successive words with the same sounds, and admits the repetition of the same sounds not only in a word onset but also in other positions (Miodyńska – Brookes, Kulawik, Tatara, 1980). It is claimed to be a good mnemotechnique, since alliterations facilitate remembering to a greater extent than visualizations or paying attention to the meaning of words.

rhyme, it is possible to divide monosylabic words into two parts[3]. Investigations conducted with Polish children (Maurer, 1994, pp. 32-39), likewise these carried out with English-speaking children, point to the significance of early abilities of a child referring to the identification and formation of rhymes and alliteration to the advances in reading and writing at school (Krasowicz-Kupis, 1999; 2004, pp. 46-47).

Most of researchers referring to the intrasyllabic elements were focused on searching for a connection between early abilities of operating with syllables, rhymes and alliterations and the learning to read and write. Results of investigations have enabled elaborating three models of dependencies (after: Krasowicz, Bogdanowicz, 1996, pp. 5 – 6).

MODEL 1
Rhymes and alliterations (*no connection*)
Reading and writing → Phonemic awareness
Model 1 assumes that the operating with rhymes and alliterations is developing in children spontaneously and is not linked with the recognitions of phonemes. The authors (J. Alegria, A. Content oraz J. Morais, P. Bertelson, L. Cary, J. Alegria) concluded on the lack of a connection between capabilities to recognize rhymes and alliterations and accomplishments in the learning to read and write.

MODEL 2
Rhymes and alliterations → Reading and writing → Phonemic awareness
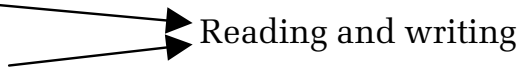In model 2 (P. E. Bryant, L. Bradley), the awareness of rhymes and alliterations leads to the discovery of the existence of phenomes, and thus to reading. In that model, the dependency between the intrasyllabic elements and the phonemic awareness explains an intermediate connection of rhymes and alliterations with the ability to read and write.

MODEL 3
Rhymes and alliterations
↓   Reading and writing
Phonemic awareness
Model 3, established by P. E. Bryant, MacLean, L. Bradley, J. Crossland based on suggestions by U. Goswami (thesis: operating with intrasyllabic elements has a direct relationship with the ability to read and write) assumes two types of connections: a) an intermediate connection – rhymes and alliterations facilitate the mastering of the "phoneme" notion; b) an immediate connection – susceptibility to rhymes and alliterations enables the mastering

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[3] In a word *but,* the sound *b* is and alliteration and *ut* is a rhyme. The rhyme may be composed of a single vowel, like in the word *tło – o.*

of reading and writing by analogy. Children discover the regularity that words which have common sounds are often written in the same way (M. Lipowska, 2001, p. 56, G. Krasowicz, M. Bogdanowicz, 1996, p. 4).

Yet, the commonly-applied methods of work with children on their linguistic development, applied so far, still prefer exercises with phonemes. According to Krasowicz-Kupis (2004, p. 88), the work on the linguistic development necessitates:

a) work on the development of child speech with the use of ortophonic exercises and taking logopedic care over all children;

b) paying more attention to linguistic exercises on syllables and intra-syllabic elements (rhymes and alliterations) and not on phonemes which are acquired the latest in the course of development;

c) not too early introduction of a phonemic analysis and an analytical method in the learning to read;

d) intensification of spontaneous linguistic plays and inspiring them;

e) propagation of early and systematic contact with a book;

f) individualization of learning methods due to distinctive styles of reading in children and adults.

Games with alliterations – the repetition of words beginning with the same sound or a letter, are a good introduction into the learning of, among others, other prosodic elements of language, which leads to the development of phonemic awareness. We are playing with children by, *e.g.* inventing sentences with alliterations („*Tomek trzyma trzy tarcze*", „*Olek ostrożnie ogląda oliwkowe oczy olbrzymiej ośmiornicy*"), by formulating sentences which begin with a specified formula („*Idziemy do...* i *bierzemy ze sobą...*") and filling the empty spaces with words beginning with the same sound („*Idziemy do parku i bierzemy ze sobą piłkę*"), and then pronouncing that sentence so that the children could repeat it and so that the sentence was becoming longer (teacher: *Siostra Sylwii słucha*, children: *Siostra Sylwii słucha*, teacher: *Siostra Sylwii słucha samych symfonii,* children: *Siostra Sylwii słucha samych symfonii*"), or by organizing "a shop with first sounds" (in the shop were are selling only those objects whose names begin with a selected sound) (Silberg, 2005, pp. 20-25).

So far, in Polish investigations no analyses were conducted for the capability to identify alliterations and to form them as affected by the duration of children attendance to a nursery school and the model[4] of reading education

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[4] Ideas on how to "introduce children into the world of writing" are basically realized acc. to two models – a standard and a holistic one (see: Górniewicz, 1989; Arciszewska, 2002; Marzano, Paynter, 2004). In both models, children are provided conditions for developing their "readiness for reading" and "mastering the skill of reading". The models

realized therein. The presented study is an attempt of recognizing those issues taking into account the above-mentioned factors.

Objective

The capability to form rhymes and alliteration is preceded by the capability of their comprehension and identification, and its mastering proceeds in accordance with regularities of speech development (Krasowicz, 1999). Due to the significance of early phonological capabilities to the course of the learning to read and write, the reported fragment of investigations was aimed at answering the following questions:

1. Have the surveyed six-year-olds mastered the capability to identify and form alliterations?
2. Are there any inter- and intra-group differences in the capability to identify and form alliterations as affected by the following factors: number of years of attendance to a nursery school and model of reading education?

Literature data enabled formulating the following hypotheses:

1. The six-year-olds surveyed have not mastered the capability to identify and form alliterations, since those capabilities are already being developed. Perfection in recognizing alliterations is reached already at the age of 6.6 to 7 years, and is maintaining until 8 years of age. In the case of the formation of alliterations, the children examined are in the critical period of the development of that capability. I assume, however, that over half of them will accomplish the result indicating that they have fully mastered the capability to identify and form alliterations.
2. Differences in the mastering of the analyzed capabilities are likely to exist between the six-year-old children depending on the number of years they have attended to a nursery school and on the model of reading education conducted with the children. The children subjected to deliberate educational procedures in a nursery school for over a year will differ from the six-year-olds attending to a nursery school for less than a year in respect of the capabilities examined. In turn, differences may not be observed between children who have been attending a nursery school for two years or longer. In addition, the children taught according to the holistic model of reading education will demonstrate better capabilities than those taught according to the traditional model.

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differ in terms of organization and applied methods of the learning to read. Both models involve the acquisition of prosodic elements of language (with various intensity).

Methods

In the study, use was made of a test method and a diagnostic survey. The phonological awareness at the intrasyllabic level was evaluated using tasks requiring the identification of alliterations (the perceptive aspect) in a picture and listening trial (Maurer, 1997, 1997a), and with the help of a trial consisting in the formation of alliterations (the expressive aspect) (Kraso-wicz-Kupis,1999). The material used in the study were meaningful words.

The picture trial evaluating the identification of alliterations involves 3 sets of 5 kits of pictures each. A task of a child was to select and point figures which were connected by alliteration, *i.e.* sound similarity at the onset of words. The trial was preceded with a training.

The listening trial evaluating the capability of identifying and forming alliterations consists of 3 sets of 5 sequences of words each. A sequence includes 3 words, of which only two begin with the same alliteration. A task of a child was to select 2 words beginning with the same sound, *e.g. album – imię – astry* (*album, astry*). The trial was preceded with a training. The quantitative analysis covered the number of correctly indicated alliterations.

The test evaluating the formation of alliterations consists of 15 sets of words. A task of a child was to form alliteration to a word provided by the researcher, *e.g. arbuz (agrest)*. The quantitative analysis covered the number of correctly formulated alliterations.

Models of reading education were determined based on data collected by means of the method of a diagnostic survey. Due to an extensive scope of the issue, the teachers were allowed to selected the mode of providing answers to questions formulated acc. to instructions to an interview. They determined the following research areas: 1) organization of the course of learning to read, 2) material conditions, 3) cooperation between family home of a child and a nursery school in the area of developing the readiness to and capability of reading, 4) opinions of teachers on the introduction of the learning to read at nursery schools.

Subjects and the course of the survey

The capabilities to identify and form alliterations were evaluated in December 2007 and January 2008 (in the course of systematic learning to read in all-day nursery groups).

The survey covered 348 children, including 182 boys (52.3%) and 166 girls (47.7%) as well as 16 teachers working in the 16 institutions surveyed. 317 children (91.09%) were attending nursery school in big cities (in Białystok and Warsaw), and 31 children (8.91%) – in small towns and in the

country (in Bielsko Podlaskie, Siemiatycze, Turośnia Kościelna). At the beginning of the survey on alliterations, the mean age of the children examined reached 6.6 years.

The institutions examined differed in terms of the realized model of reading education (holistic and traditional model). 118 children (33.9%) attended institutions that were implementing the holistic model of reading education, whereas 230 children (66.1%) attended nursery schools that were accomplishing the traditional model.

Out of the surveyed subjects, 180 children (51.7%) began to attend the nursery school at the age of 3 years, 62 children (17.8%) – at the age of 4 years, 44 children (12.6%) – at the age of 5 years, whereas 62 children (17.8%) entered a nursery school at the age of 6 years. Thus, in the group surveyed, the mean number of years of attendance to a nursery school reached 3 years.

The survey was conducted individually, in the forenoon (in order to minimize the fatigue of children and the executor) in specially provided rooms (*e.g.* a logopedic room, a school headmaster room, a room for plastic arts activities). Caution was exercised to establish a good contact with children. To this end, the executor was introducing himself by name and was asking a few neutral questions. This enabled reaching a positive motivation for the survey. The time for performing particular trials was set at 10 to 15 minutes (depending on the type of test). In the course of the surveys, teachers were organizing some activities to the other children, to disable the exchange of information between the already surveyed and the no-surveyed children on tasks accomplished in the survey.

The postulated method of description of capabilities is derived from the theory by J. E. Gombert and from a model – established based on the critical analysis of that theory – presenting the range of metalinguistic development in three aspects: phonological, syntactic and semantic, by G. Krasowicz – Kupis (1999). The model assumes, among other things, that each metalinguistic skill is based on such activities as: recognition, differentiation, manipulation, evaluation of correctness *etc.*, performed on respective linguistic elements.

Results

Results of the survey indicate that the examined six-year-olds were recognizing, on average, less than 14 alliterations (92.27%) in the picture trial, and 13 alliterations (87%) in the listening trial. Mean results of alliteration tests are presented in Tab. 1.

Tab. 1. Characteristics of results obtained by the children surveyed in the test for the identification of alliterations (N = 348).

Trial	Test for identification of alliterations			
	x	*S*	min	max
Picture	13.84	2.786	0	15
Listening	13.05	2.972	0	15

Source: own study. Explanations: x- arithmetic mean, S – standard deviation, min – minimal value in the trial, max – maximal value in the trial.

As indicated by results collated in Tab. 1, in the test for the identification of alliterations the children achieved better results in the picture trial, as compared to the listening trial.

The analysis of data shows that the capability of recognizing alliterations in the picture trial (PT) was fully mastered (which was indicated by the maximum number of points scored) by 255 children surveyed (64.65%), and that 4 children (1.15%) did not cope with that task (scored less points). The most common result achieved by the children was simultaneously the maximal result and the intermediate result, and accounted for 15 points.

In the case of the listening trial (LT), alliterations were correctly recognized by 152 children (43.67%), whereas 6 children failed in that task (1.72%). The most common result achieved by the children was simultaneously the maximal result and the intermediate result, and accounted for 15 points.

Capabilities to identify alliterations in PT and LT, with *as affected by the number of years of attending to a nursery school,* and percentage data referring to the level of mastering those capabilities are presented in Tab. 2.

Results presented in Tab. 2 indicate that the percentage of children who mastered the capability of recognizing alliterations in both trials (PT and LT) was increasing beginning from the second year of attending to a nursery school, then decreased (in LT) in children attending a nursery school for 3 years, to finally increase again in the children spending the fourth year in a nursery school. Presumably, these are not only transformations that result exclusively from developmental changes.

Tab. 2. Collection of data referring to capabilities of identifying alliterations in PT and LT, as affected by the number of years of attending to a nursery school.

Result of trials	Number of years of attending to a nursery school							
	1 year		2 years		3 years		4 years	
	n	%	n	%	n	%	n	%
Maximal – PT	26	2.3	32	72.7	43	69.4	154	85.6
Minimal – PT	0	0	1	2.3	0	0	3	1.7
Maximal – LT	14	22.6	23	52.3	33	53.2	82	45.6
Minimal – LT	2	3.2	1	2.3	1	1.6	2	1.1

Source: own study.

Tab. 3 presents data depicting changes in the capability to identify alliterations in the compared groups selected based on the number of years of attending to a nursery school.

Tab. 3. Changes in the capability of identifying alliterations in PT and LS in the groups compared.

Phases of analyses	Identification of alliterations			
	PT		LT	
	z	p	z	p
1 year *vs.* 2 years	-3.534	0.000	-3.938	0.000
1 year *vs.* 3 years	-3.632	0.000	-4.599	0.003
1 year *vs.* 4 years	-7.049	0.000	-4.668	0.000
2 year *vs.* 3 years	-0.420	n.i.	-0.154	n.i.
2 year *vs.* 4 years	-1.908	n.i.	-0.811	n.i.
3 year *vs.* 4 years	-2.720	0.007	-1.121	n.i.

Source: own study.

It has turned out that statistically significant differences occurred in the level of mastering the skills examined between children attending to a nursery school the first year and those attending to a nursery school for two, three and four years. In turn, the children who have been attending a nursery school for two or more years were not significantly different between one another in terms of the level of mastering the capability of recognizing alliteration in LT. In contrast, the PT showed that children attending a nursery school for three and four years differed between one another to a statistically significant extent.

It indicates that the children from a group attending to a nursery school for a year are worse in recognizing alliterations in PT and LT than the children attending there for at least two or more years. The children who were attending a nursery school for two, three or four years did not differ in terms

of the level of mastering the capability of identifying alliterations in LT, yet the children attending there for three years were recognizing alliterations in PT worse than the children attending there for four years.

The capability of identifying alliterations in PT and LT, with *as affected by the models of reading education,* and the assessment of mastering (max) and not mastering (min) those capabilities are presented in Tab. 4.

Data presented in Tab. 4 demonstrate that in terms of the complete mastering of the capability to identify alliterations, both in PT and LT, the children educated by means of the HM were superior over those educated based on the TM.

Tab. 4. Collection of data referring to capabilities of identifying alliterations in PT and LT as affected by the model of reading education realized at a nursery school.

Result of trials	TM*		HM**	
	n	%	n	%
Maximal – PT	157	68.3	98	83.1
Minimal – PT	4	1.7	0	0
Maximal – LT	92	40	60	50.8
Minimal – LT	6	2.6	0	0

*Source: own study; Explanations: *TM – traditional model, **HM – holistic model.*

In addition, only in that group of the surveyed (HM) there were no six-year-olds who failed all tests. The statistical analysis confirmed the significance of a dependency of the capability to recognize alliterations on the model of reading education [Man-Whitney U-test; in PT ($z = -3.296$; $p = 0.001$) as well as in LT ($z = -2.575$; $p = 0.01$)].

Results of the study show that in the tasks applied the six-year-olds surveyed were forming 12 alliterations on average (85.4%). The mean results in the test of alliteration formation are presented in Tab. 5.

Tab. 5. Characteristics of results achieved by the children surveyed in the test of alliteration formation (N = 348).

Test	Test of alliteration formation			
	x	S	min	max
Construction of statements	12.81	3.391	0	15

Source: own study. Explanations: x- arithmetic mean, S – standard deviation, min – minimal value in the trial, max – maximal value in the trial

The analysis of results obtained demonstrated that the capability to form alliterations was fully mastered (which was indicated by the maximum num-

ber of points scored) by 159 surveyed children (45.7%). This task was not completed (which was indicated by the lowest score – 0 points) by 6 children (1.7%). The most frequently reported result accounted for 15 points and the intermediate one – for 14 points.

The capability to form alliterations *as affected by the number of years of attending to a nursery school* as well as percentage data referring to the mastering (max) or not mastering (min) that capability were presented in Tab. 6.

In addition, only in that group of the surveyed (HM) there were no six-year-olds who failed all tests. The statistical analysis confirmed the significance of a dependency of the capability to recognize alliterations on the model of reading education [Man-Whitney U-test; in PT (z = -3.296; p = 0.001) as well as in LT (z = -2.575; p = 0.01)].

Tab. 6. Collection of data referring to the capability to form alliterations as affected by the number of years of attending to a nursery school.

Result of trials	Number of years of attending to a nursery school							
	1 year		2 years		3 years		4 years	
	n	%	n	%	n	%	n	%
Maximal	16	25.8	19	43.2	29	46.8	95	52.8
Minimal	1	1.6	1	2.3	1	1.6	3	1.67

Source: own study.

Results presented in Tab. 6 indicate that the longer did the children attend to a nursery school, the better was their capability to form alliterations. Presumably, these are not only transformations that result exclusively from developmental changes.

In contrast, data from Tab. 7 show that there were no differences in the level of mastering the capabilities analyzed in the study between children attending to a nursery school for one year and for two years. The children who were attending to a nursery school for one year differed in the capability to form alliterations from those going there for three and four years. In turn, the children who were attending a nursery school for two or more years do not differ between one another in the level of mastering that capability.

Tab. 7. Changes in the capability to form alliteration in the groups compared.

Phases of analyses*	Formation of alliterations	
	z	p
1 year *vs.* 2 years	-1.445	n.i.
1 year *vs.* 3 years	-2.961	0.003
1 year *vs.* 4 years	-3.845	0.000
2 year *vs.* 3 years	-0.927	n.i.
2 year *vs.* 4 years	-1.422	n.i.
3 year *vs.* 4 years	-0.407	n.i

*Source: own study. Explanation: * Mann – Whitney U-test.*

It indicates that the children from a group attending to a nursery school for a year were worse in the formation of alliterations than the children attending there for at least two or four years. The children who were attending a nursery school for two, three or four years did not differ between each other in terms of the level of mastering the capability to form alliterations.

The capability to form alliterations *as affected by the model of reading education* and identification of the complete mastering (max) or not mastering (min) that capability were summarized in Tab. 8.

Tab. 8. Collection of data referring to the capability to form alliterations as affected by the model of reading education implemented in a nursery school.

Results of trials	TM*		HM**	
	n	%	n	%
Maximal	94	40.87	68	57.63
Minimal	6	2.6	0	0

Source: own study. Indications as in Tab. 4.

Data presented in Tab. 8 point to a difference in the capability to form alliterations between the surveyed children educated acc. to the traditional (TM) and holistic (HM) model of reading education. The statistical analysis confirmed differences between the groups compared in respect of alliteration formation capability (Mann – Whitney U-test: $z = -2.696$; $p = 0.007$). The better level of mastering that capability was observed in children educated acc. to the holistic model.

Conclusions

The results obtained confirmed the adopted hypotheses. Using the "criterion of mastering the capability" [5] adopted after G. Krasowicz-Kupis, it was found that:

a) in terms of the capability to identify alliterations:

– the children surveyed did not master that capability (min. result in PT 1.15% [< 5%], max. result in PT 64.65% [≤ 75%], whereas min. result in LT 2.01% [< 5%] and max. result in LT 43.67% [≤ 75%]), however children educated acc. to the holistic model (HM) mastered completely the capability of identifying alliterations in the PT (min. result 0% [<5%] and max. result 83.1% [≤ 75%];

– the assumption that over half the children will master the capability to identify alliterations was confirmed (but only in the picture trial);

– the capability to identify alliterations is increasing along with the number of years of attending to a nursery school, and the percentage of children who mastered that capability in both trials (PT and LT) was increasing starting from the second year of attending to a nursery school;

– the children educated acc. to the holistic model (HM) were better in recognizing alliterations in PT and LT than the children educated acc. to the tradition model (TM), and the difference between them turned out to be statistically significant.

b) in terms of the capability to form alliterations:

– the children surveyed did not master that capability (min. result in 2.01% [< 5%], and max. result 45.7% [≤ 75%]), but still the children educated acc. to the holistic model (HM) reached better results in that capability as compared to those educated acc. to the traditional model (TM);

– the assumption that over half the children will master the capability to form alliterations was not confirmed;

– the capability to form alliterations is increasing along with the number of years of attending to a nursery school;

– the children who were attending a nursery school for one and two years were accomplishing lower results in terms of alliteration formation as compared to the children who were attending to a nursery school for at least three or four years.

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[5] Likewise in the study by G. Krasowicz-Kupis, the following criteria of mastering a capability were adopted: less than 5% of the surveyed children would fail completely (0 points) and at least 75% of the children would achieve success (maximal result)

In addition; the six-year-olds surveyed were coping better with the identification than with the formation of alliterations.

The result obtained indicate that the activities preparing children for the learning to read, and consisting in some part in the practicing of linguistic skills on syllables and intrasyllabic elements (rhymes and alliterations), should be commenced earlier than with the moment of going to school. It should additionally be emphasized that difficulties in the identification and formation of alliterations in a six-year-old child may indicate that the child is at risk of dyslexia (Bogdanowicz, Kalka, Krzykowski, 2006).

Abstract

Child-friendly educational procedures consisting in the supporting a child in the mastering of the reading are implemented in two ways: a) an intermediate way (by "developing the readiness), and b) in an immediate way – by learning to read. Both types of actions should merge. Amongst factors determining success in the learning to read and write, P. Bryant and U. Goswami – authors of the casual theory of reading, indicate early-childhood phonological skills, including: identification and formation of rhymes and alliterations (*i.e.* the capability to differentiate larger elements than a single sound, but smaller than syllables (rhymes and alliterations)). Child's susceptibility to, among other things, alliterations results in advances in reading and writing in the subsequent education.

A significant part of the reported study was devoted to models of reading education applied in the case of the six-year-olds examined. Ideas on how to "introduce children into the world of writing" are basically realized acc. to two models – a standard and a holistic one (see: Górniewicz, 1989; Arciszewska, 2002; Marzano, Paynter, 2004). In both models, children are provided conditions for developing their "readiness for reading" and "mastering the skill of reading". The models differ in terms of organization and applied methods of the learning to read (Czerwińska, Narożnik, 1997; Doman, Doman, 1992; Majchrzak, 1995, 2007; Rocławski, 1998; Arciszewska, 2002). Both models involve the acquisition of prosodic elements of language (with various intensity).

The presented fragment of a research was aimed at providing an answer to a question on the level of capabilities to identify and form alliterations displayed by the surveyed six-year-old children. In analyses, consideration was given to the number of years the children have been attending to a nursery school and the model of reading education realized therein.

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Marzena Dziołak
Sylwia Pykacz

EXEMPLIFICATION OF INTERLIBRARY COLLABORATION OF THE LIBRARY AT POPE JOHN PAUL II STATE SCHOOL OF HIGHER VOCATIONAL EDUCATION IN BIAŁA PODLASKA

Key words: interlibrary collaboration, interlibrary loans, interlibrary exchange of publications.

On of the tasks of the elaborated and implemented Development Strategy for the Library at the Pope John II State School of Higher Vocational Education in Biała Podlaska (SSHVE in Biała Podlaska) is the development of various forms of collaboration with local and national libraries as well as establishing contacts with foreign libraries. It has been known for long that no library is capable to accomplish the tasks set to it by itself, and that multi-aspect areas of collaboration enable developing actions both in the field of library processes and services.

The multitude and multi-diversity of library materials, a vast and constantly developing information infrastructure and, finally, the development of a new category of readers, *i.e.* customers with highly individualized educational, scientific and informative needs, make that no library, even the largest one, has resources able to satisfy expectations of all users. Hence, the collaboration between libraries in different areas and in various configurations, involving all library processes, is becoming necessary and undisputable (Wojciechowski 2006, p. 32). Its major objective should be to improve library and information services of particular collaborating libraries. Taking all these into account, a question arises: how and, most of all, whether the current library policy of the state and the binding library legislation help in building solid grounds of collaboration?

The currently valid Act of the 27th June of 2007 on libraries refers sparsely to scientific libraries, namely *e.g.* libraries of higher school. "The whole" issue referring to that type of libraries has been addressed by the legislator practically in only one small chapter six, and likewise a number of other types of libraries, the scientific libraries have not been included by the legislator to a nation-wide library network which, by the force of the Act,

associates only public libraries (Ustawa z dn. 27.VI. 1997 r., rozdz. 10, art. 27, ust. 2 [Act of the 27th of June 1997, Ch. 10, art. 27, par. 2]).

Paragraph 5 of art. 27 of the above-mentioned Act obliges libraries included into the nation-wide network for cooperation in the area of:
1. gathering, elaborating, storing and delivering the resources,
2. preparation and dissemination of bibliographic and documentary data,
3. research activity as well as additional training and occupational improvement of librarians,
4. exchange and transfer of library materials and information.

Libraries other than the public ones may, on the organizer's motion, be incorporated into the network and then, in accordance with the Act, be obliged to collaboration (Ustawa z dn. 27.VI. 1997 r., rozdz. 10, art. 27, ust. 3 [Act of the 27th of June 1997, Ch. 10, art. 27, par. 3]). No cases of submitting such applications by universities are known whatsoever. Therefore, formally our library is still remaining outside the nation-wide network and is are not legally obliged for collaboration. Hence, the library would not break the law by not undertaking that obligation. But still, may the lack of legal regulations and executive acts exempt our library from such an obligation? The awareness of the need of cooperation, its effect on the development of services, professional responsibility and care over our true and potential users are an indicator and a driving force of activities, and there are no regulations of the Act that would change that. It is for the readers that we are extending the range of services, building and developing information space as well as helping in reaching the needed sources of information and documents. This is also facilitated by the mutual interlibrary collaboration.

Taking care of our readers, in the year 2004 the Library of the Pope John II State School of Higher Vocational Education in Biała Podlaska (SSHVE in Biała Podlaska) has signed the first agreements referring to interlibrary borrowings with the Institute of English and German Studies, University of Warsaw. In spite of the fact the accounts have been opened according to student's interests, we have not realized any order. Such a situation might have been due to the fact that the titles requested, being especially useful in writing semester or seminar works or dissertations, were provided to students by lecturers in a rapid quantitative and qualitative increase of neophilological collections. Another agreement referring to Interlibrary borrowing has been signed with the Main Library of the Maria Curie-Skłodowska University in Lublin, and in the year 2008 with the Library of the Warsaw School of Economics.

Based on that form of cooperation, we have received 35 orders from our readers. We have executed 32 orders, submitted mainly by Ph.D. students.

Only 5 queries were submitted by students. Three orders were placed by readers for non-borrowable titles, hence they have not been executed.

Queries submitted by SSHVE Library to Library of Maria Curie-Skłodowska University in Lublin		Executed	Non-executed	Execution pending
by employees	by students			
21	5	26	-	-
Total queries: **26**				

Queries submitted by SSHVE Library to Library of Warsaw School of Economics		Executed	Non-executed	Execution pending
by employees	by students			
9	-	6	3	-
Total queries: **9**				

- **TOTAL**

queries from both Libraries		Executed	Non-executed	Execution pending
by employees	by students			
30	5	32	3	-
Total queries: **35**				

The reasons of the minimal exploitation of that method of reaching to the sought publications include, most of all:
- its small popularity amongst readers – in spite of the fact that one of the issues discussed on a library training for students are interlibrary borrowings,
- poor skills of readers in searching for literature in computer data bases and OPAC catalogues,
- a displaying mode of borrowed publications – becoming aware of that, the readers often resign from that service,
- a lack of a uniform system of borrowings affects considerably the extension of the time of order execution – it takes weeks from a written request for opening an account for a library interested in establishing collaboration, through exchange of agreements, to the practical opening of the account in the partner library – this often discourages the readers who are usually placing their orders at the very last moment and expect their immediate execution,
- a lack of the possibility of opening a computer library account and ordering books online – not all libraries offer that possibility.

We are noticing those problems in the effective functioning of the system of interlibrary borrowings from the perspective of a library that is mainly placing orders, if at all we may say about any system and uniform rules of executing those services. In order to protect our potential future partners, to which the Library of the State School of Higher Vocational Education in Biała Podlaska will be the borrowing library, and to shorten the time of a query execution to the minimum, we have launched an "Interlibrary borrowing" bookmark at our web site. By unrolling the bookmark, a reader may automatically open an account and after receiving a password may also place orders.

In the Library of the State School of Higher Vocational Education in Biała Podlaska, an account for online ordering of books has been opened for the Library of SSHVE in Gniezno and for Maria Dąbrowska Municipal Public Library in Świebodzice.

Making a one step further and being aware that the term "interlibrary lending" is no longer enough to encompass all contents the contemporary practice has been inscribing into it (Biliński 2006, p. 34), we are planning to introduce a new service referred to as "interlending and document supply". In order to popularize it, we have commenced preparations for an intensive informative campaign. The advertising campaign will be run on a school large screen, on notice boards, library trainings and at seminar groups.

The short presentation of our activities in the area of interlibrary loans enables drawing an explicit conclusion that the effective functioning of that system necessitates the elaboration of common, uniform rules of reciprocal lending the collections, and the usage of interfaces enabling the ordering from the level of a user. This will help, first of all, the readers in faster reaching publications they need, it will also considerably facilitate the work of librarians, and will affect the quality of services and positive image of libraries. Since it is common knowledge that the effectiveness of the system determines opinions on libraries and librarians.

Another extremely important area of interlibrary collaboration is the exchange of publications, that is highly significant for the collection of resources.

The Library of the State School of Higher Vocational Education in Biała Podlaska has been conducting such an exchange. It is based on works published by educational institutions, and the major partners are libraries of most of the State Schools of Higher Vocational Education.

With the beginning of the publishing activity of our School, we have established exchange with all contemporarily-existing vocational schools, and were successively incorporating the newly-founded ones. With some institu-

tions the cooperation is expanding, with others it is loosening or terminating. This might be due to:

– various intensity of the publishing activity, the number of titles published or the edition size – by receiving less publications than we are sending out, we obviously feel some discomfort and perhaps were are losing the confidence in contractors, which affects the loosening of collaboration,
– internal regulations of particular schools/universities referring to the rules of exchange and possibilities of obtaining titles for exchange from the Publishing House,
– differences in educational profiles – the scope of published works restricts possibilities of exchange, we are trying to send books corresponding to educational majors, since they, above all, determine the profile of library collections,
– a lack of agreements determining common principles of exchange.

The list of partner libraries is slowly crystallizing.

The most intensive exchange is conducted with schools having similar educational profiles. Apart from the State Schools of Higher Vocational Education, we are running the exchange with three academies of physical education and other higher schools offering education at the following majors: tourism, recreations and hospitality management. The existing circle of partner libraries determines mainly the canon of titles published by the SSHVE in Biała Podlaska.

Formal agreements, the main clause of which is the principle of barter, have been signed with six higher schools, including two SSHVEs – in Gniezno and Krosno. In the case of the other schools, the exchange is conducted based on letters inviting for exchange sent with first publications.

In the year 2008, we have received 47 copies of books and 19 issues of journals from SSHVEs, whereas we have sent in exchange 46 copies of books and 11 issues of a *Rozprawy Naukowe* periodical.
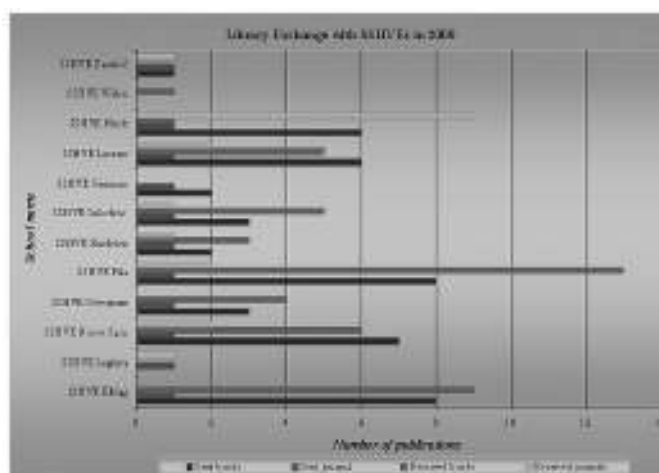
In the case of exchange conducted with academies of physical education, we have received 27 copies of books and 17 issues of journal; and we have sent them 22 copies of books and 3 issues of journals.
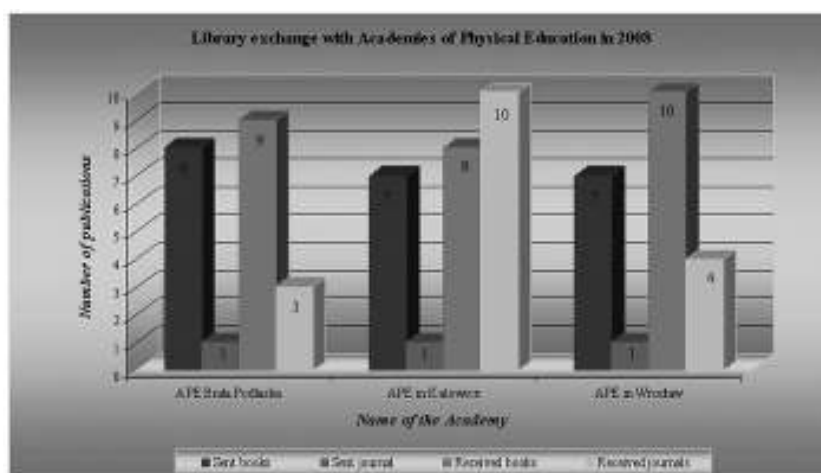
In the case of the exchange run with other schools, the Library at the State School of Higher Vocational Education in Biała Podlaska has received 53 copies of books and 24 issues of journal, whereas the numbers of the respective books and journals sent by the Library to those institutions accounted for 50 and 8, respectively.

In summary, the exchange of publications in the year 2008 was as follows:
- 127 copies of books and 60 issues of journal received from other schools,
- 118 copies of books and 22 issues of journal sent to the collaborating libraries from particular higher schools.

Library exchange with other types of schools in 2008

Library exchange in 2008
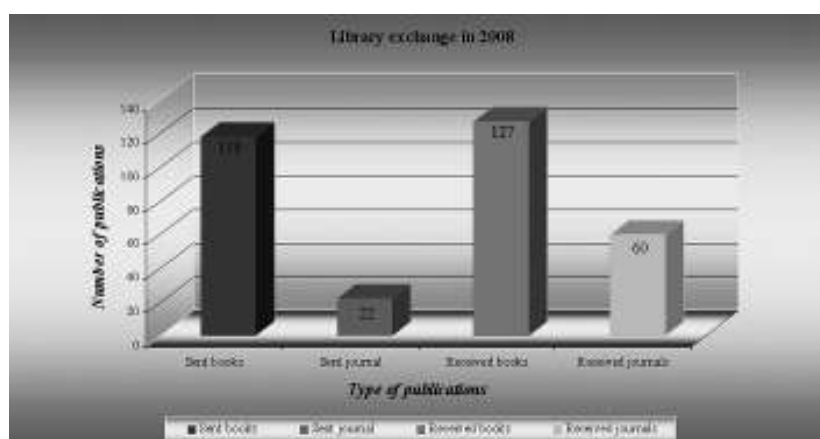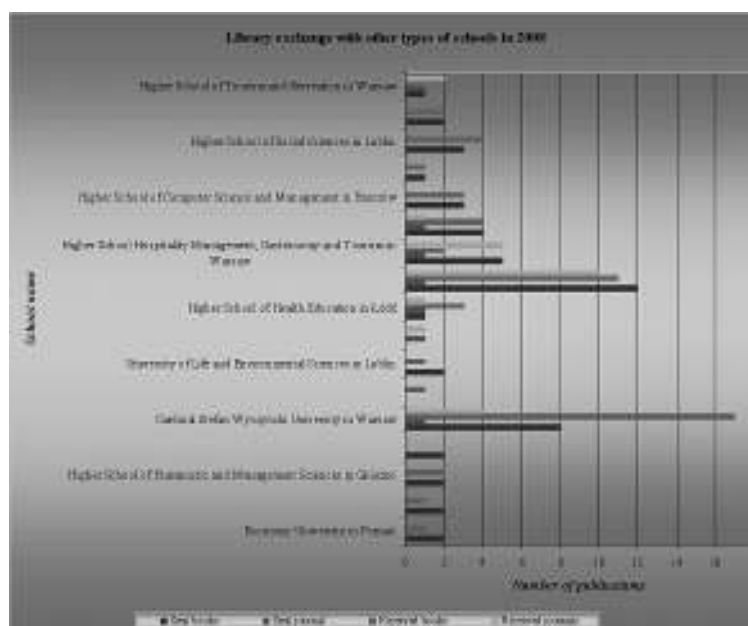
The balance of exchange is positive to our Library. It results, among other things, from the fact that the group of partner institutions encompasses schools whose publishing activities is more intensive than that of ours. A high number of publications, often with multiple copies, has been delivered by the Cardinal Stefan Wyszyński University in Warsaw, which has a significant impact on our positive balance of the exchange.

We are achieving a number of publications *ad hoc* – we are searching for interesting titles and we are inviting schools for reciprocal exchange for a specified title. Often, but not always, those transactions are finalized positively. Along with the development of publishing activity and acquisition of new titles, our activity in publication exchange will inevitably increase, which in turn will result in the establishing of a network of partner libraries satisfied from common collaboration.

The exchange of publication is not only a source of new acquisitions, but also:
– promotion of school publications in the environment of higher schools,
– information on the scientific activity of the school,
– winning a potential sale market for school publications.

Despite a lack of formally-functioning nation-wide network of scientific libraries and a unit coordinating the organizational and methodological activities of higher school libraries; and despite a lack of executive regulations to the Act on libraries (trying to avoid problems with the elaboration of regulations to art.28, that were supposed to refer, among others, to interlibrary loans and exchange, by introducing a revision the legislator simply removed that article), everyday practice shows that we are functioning well, that we are becoming more effective in organizational and methodological aspects, and that collaboration is one of the key activities of a library. It is invaluable in maintaining links and in communication in the library environment, as well as enriches and completes library's offer, thus affecting the positive perception of the library by readers.

Abstract

No library is self-efficient and capable to accomplish the tasks set to it by itself. Since none of the libraries can satisfy various needs of its users by itself, for it does not possess sufficient funds nor space for collecting all necessary materials. Thus, the collaboration of libraries in different areas and in various forms is one of the factors enabling the optimization of library activities as well as the improvement in the quality of services offered.

One of the examples of interlibrary collaboration undertaken by the Library of the Pope John Paul II State School of Higher Vocational Education in Biała Podlaska, are interlibrary loans and interlibrary exchange of publications.

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Wiesław Romanowicz

REVIEW OF A BOOK SOCIAL PROBLEMS
OF THE FUNCTIONING OF PERSONS WITH MENTAL
IMPAIRMENT IN THE OPINION OF INHABITANTS
OF THE BIALSKI DISTRICT BY DOROTA TOMCZYSZYN,
WYDAWNICTWO PWSZ IM. PAPIEŻA JANA PAWŁA II
W BIAŁEJ PODLASKIEJ, BIAŁA PODLASKA 2009, P. 144.

Dorota Tomczyszyn is a Doctor of Humanist Sciences in the major of sociology and has been working at the Institute of Sociology, State School of the Higher Vocational Education in Biała Podlaska, for three years. She is an author of about forty scientific manuscripts and a co-author of a book entitled "Studenci pogranicza polsko-białoruskiego wobec problemów współczesności" („Students of the Polish-Belarusian borderland against Problems of Contemporary Times"). In most of the works published so far, Dr. Tomczyszyn was addressing problems of disability and family in the social and educational context.

In the reviewed work, the author has undertaken an attempt to introduce a reader the opinions of the inhabitants of the Bialski District on the functioning of persons with mental impairment. Statistical surveys indicate that in Poland there are ca. 5.5 millions of disabled persons, including ca. 10% of those with mental impairment. It is a considerable, yet often neglected in scientific research, group of inhabitants of our District. Usually, their issues are investigated by a narrow group of experts of psychology, medicine or pedagogy. The hereby presented book extends the scope and range of interests in those issues with opinions of a representative of social sciences.

The reviewed book is a monograph based on empirical research conducted in May 2007 in the Bialski District. It consists from ten chapters, references and an annex compiling comprehensive statistical data. In such type of work, it would be advisable to complete the annex with a survey questionnaire containing detailed questions, that could be applicable to the beginners in research on the problems linked with the mentally-impaired persons. Generally, the outline of the work is clear and logic, with three distinct sections, *i.e.* theoretical, methodological and analytical one, the latter additionally providing interpretation of the results obtained.

The aim of the study, established by the author of the reviewed book, was to recognize opinions of inhabitants of the Bialski District on the functioning

of persons with mental impairment in various sectors of social life (p.43). It is undoubtedly the just, but a very wide and extensive objective, which may pose a problem of focusing on specific scopes of these issues already at the stage of conducting the study. Those issues pointed out by the author refer, among other things, to defining the mentally-impaired persons, indicating traits that are typical of them, determining emotional attitudes towards the mentally-impaired persons, showing educational and occupational problems linked with that group of people as well as the possibility of establishing families by them (p.43-44).

Owing to such an extensive problematic scope of the study, the author provides very general answers to those problems, without in-depth explanation of particular issues. All analyses are presented only in qualitative perspective, which naturally impairs more elaborate interpretation of results. Though, the theoretical section partly introduced a reader into the problems of mentally-impaired persons, operationalization of basic terms and detailed description of a research procedure are clearly missing.

The chapter referring to research methods is very enigmatic and comes down to the description of study scheme, providing – but not explaining – the objective of the study and presentation of detailed problems, without explicit determination of the major research problem.

In contrast, the chapters providing results obtained in the study and their interpretation are written clearly and comprehensibly. Worthy of notice is the logical description of the presented data. While elaborating on the study, the author skillfully utilizes graphical forms and makes accurate observations. The book contains 41 figures and 21 tables. Its contents are logically arranged and related, and the problems addressed in particular chapters focus around the established aim of the study.

The author accurately drives her analyses towards a family. As it results from the study, it is the family and the state that are clearly holding the responsibility over mentally-impaired persons. This view is shared by 67.37% of the respondents. Yet, as little as 14.4% of the inhabitants of the Bialski District claimed that the total care over those persons should be taken by the family (p. 65).

The value of the work is significantly affected by accurately and interestingly formulated conclusions.

As observed by the author, some inconsistency exists amongst the respondents from the Bialski District in the determination of their own attitude towards persons with intellectual deficit. Though the respondents pointed mainly to negative personal traits of the mentally-impaired persons, yet they determined their emotional attitude to those persons in positive categories. Most frequently, the inhabitants of the Bialski District would try

to accept their presence (22%) and to treat them as they treat other people (21%). This, however, raised some doubts while analyzing results on the possibility of establishing friendly relationships with a mentally-impaired person. The smallest reservations were observed upon the possibility of establishing a friendship with a person affected by limb paralysis, a blind person, or a person with heart failure, whereas persons mentally ill and mentally impaired would be chosen as a friend the least frequently (p.127).

The respondents turned out not to be supporters of educational integration with the mentally-impaired persons. They supported placing the intellectually-disabled children in special schools and classes (opinions of half the respondents). Less than half the inhabitants were approving the education of those children in the system of mass school (p. 127).

Some unfavorable opinions towards persons with intellectual deficit still occur in declarations of the respondents. In part, the study demonstrated also a lack of knowledge on the functioning and social possibilities of mentally-impaired persons (p. 130).

It is fitting to agree with the author that in the educational process of a society, extending knowledge on disability and persons affected with is necessary, especially amongst the young generation. From the perspective of integration processes, diversified and even negative opinions do happen in many fields. It seems that the model of segregation education and an attitude of isolation against the act of friendship with a mentally-impaired person still exists in the awareness of a too high number of the respondents. Some of the respondents would never give the intellectually-impaired person the right to establish a family and to have children (p.135).

The entire work represents a valuable contribution into the depiction of opinions of the Bialska community on the functioning of persons with mental impairment. The author should be praised for the idea and effort of conducting a field survey as well as for the presentation of the results obtained in the form of a book. I think that this work will receive a positive reception from experts of various fields of social sciences and will enrich literature to be used in the didactic work with students. I am also convinced that it will become an inspiration to other investigators to direct their research efforts into the problems of disabled persons.

Ewa Jagiełło

REVIEW OF A BOOK WSPOMAGANIE PROCESU ADAPTACJI DZIECKA DO ŚRODOWISKA PRZEDSZKOLNEGO (SUPPORTING THE PROCESS OF CHILD ADAPTATION TO THE ENVIRONMENT OF A NURSERY SCHOOL) BY PROF. DR. ANNA KLIM-KLIMASZEWSKA, SIEDLCE 2007

Anna Klim-Klimaszewska, *Wspomaganie procesu adaptacji dziecka do środowiska przedszkolnego (Supporting the process of child adaptation to the environment of a nursery school)*, ELPIL - Jarosław Pilich, Siedlce 2007, p. 257.

The book by Prof. Dr. Anna Klim-Klimaszewska is a title addressed to parents and tutors as well as to students of teaching majors at classes of nursery pedagogy. The author presents difficulties in the adaptation of a child to the environment of a nursery school. She introduces the notion of adaptation, which is one of the most ambiguous terms. The author presents methods used by pedagogues in supporting the process of children adaptation to the environment of a nursery school. The book is characterized by multiple didactic values, including competence, comprehensive language and transparency.

The book consists of two chapters. The first chapter entitled "Theoretical bases of disorders of the process of adaptation to the environment of a nursery school", was divided into five sub-chapters discussing on both adaptation difficulties of a 3-year-old child to new conditions as well as on factors determining that process. Based on an overview of rich literature on the subject, the author describes different stimuli that affect the adaptation capabilities. In-depth account is provided for endogenous and exogenous factors inducing the adaptation and defensive responses. In the first group the author includes: child's age, gender, individual characteristics of the neural system, health status, general level of psycho-motor development, whereas in the second group the author specifies most of all the family environment of a child (living standards of the family, its formal structure, number of family members, interrelations between family members, attitudes of parents and the system of upbringing linked with them, as well as characteristics of the new nursery environment).

The specified nuances had a significant impact on the further structure of the first chapter, just to mention paying attention to the developmental process of a 3-year-old child with a relatively detailed presentation of factor impairing the adaptation process. The developmental characteristics of a small child determine adaptation mechanisms. Their insufficient development results in undesirable responses. The author refers them to as "disorders", and specifies disorders of the emotional sphere and psycho-motor inhibition. Typically theoretical considerations are supported with numerous examples that enable a practitioner to recognize those disorders. Paying attention to those syndromes is quite important, since long-lasting traumatic activities or significant stress-bearing experiences induce side effects for the future in the neural system of a pre-school pupil. A conviction functions in psychology that the first social contacts of children are commemorated and affect the functioning of a man in his future life. Therefore, in the reviewed book Prof. Dr. Anna Klim-Klimaszewska substantiates that "one of very important tasks is to prepare 3-year-old children for entering into a nursery school environment being new to them. To make this change not a rapid breakthrough for them, their step-wise introduction to undertaking different duties and introduction of work elements to their life are necessary already at a family level"(Klim-Klimaszewska, p.43). According to the author, the family plays a significant role in the preparation of a child to the role of nursery school pupil, by establishing the appropriate educational effects. In other words, the family is the finest therapist in correcting and compensating shortages, deviations and difficulties of own child. Inevitably, a question will arise amongst parents: How to accomplish the function held competitively? Those reflections result in advices and remarks presented at the end of the fourth chapter. Special emphasis is put to two of them, namely: parents' confidence in nursery school workers and cooperation with a tutor in order to adopt a relatively unified didactic process at home and at the nursery school. The author refers to the fact that the pre-school effects should be one-sided, but directed to both children and their parents. At the initial phases, it is accomplished with the use of a preliminary adaptation program which facilitates the relieve of negative experiences of both sides, evoked by a sudden separation from the closest relatives and by entering into a new, unfamiliar world, that inhibit possibilities of development of cognitive and social activity. Under those circumstances, a child and his parents lose the sense of psychical safety, which is a symptom of the lack of emotional bond with the environment of a nursery school. The author emphasizes that the elimination of stress-bearing factors has a decisive impact, and so has the organization of the adaptation process by the school. An equally important issue is the course of that process. A well-elaborated

program of preliminary adaptation is a backbone of further activities. It usually consists of three key elements constituting a uniform whole:

– "establishing cooperation with the family (…),
– programme of special activities and meetings organized by teachers for parents and children at the area of a nursery school,
– changes in work organization of nursery school departments".

Each of the above-mentioned blocks has specified objectives that have been determined comprehensively in the fifth chapter. What links those elements is the major objective, *i.e.* getting rid of a picture of a nursery school as a formalized institution, in favor of an open institution in which a child is perceived as a rightful participant of a widely comprehended dialogue.

Yet, the author warns all readers the adaptation programme itself, even the best one, is not a recipe for everything. It acts similarly to APAP in headaches, ones are relieved, others are not.

The second chapter entitled "Actions of a nursery school supporting the adaptation process of a child to the environment of a nursery school" is an excellent source of practical knowledge to students and nursery school teachers. It provides exemplary adaptation programmes, with a broad array of methodological solutions in the form of class scenarios, prepared and realized by teachers-practitioners.

The book is written in a very accessible way. A dual structure makes that the book's contents are very clear and comprehensive. The book is addressed to students of teaching majors at classes of nursery pedagogy and to all teachers interested in problems of pre-school education.

The revised book was based on ample multilingual literature. It provides a reader with both basic textbooks and literature extending knowledge on the development of a child at the pre-school age, childhood psychiatry and psychology, developmental disorders, education of children at the school age, *etc.* I find the book *Wspomaganie procesu adaptacji dziecka do środowiska przedszkolnego* (*Supporting the process of child adaptation to the environment of a nursery school*) a very good manual, which I recommend with full responsibility.

Danuta Guzal-Dec

REPORT ON THE CEREMONY OF CONFERRING THE *DOCTOR HONORIS CAUSA* DEGREE OF THE LUBLIN UNIVERSITY OF ENVIRONMENTAL AND LIFE SCIENCES TO PROF. DR HAB. MIECZYSŁAW ADAMOWICZ

1. Course of the ceremony

On the 21st of January 2009, at 12.00 a.m., at the Congress Centre of the Lublin University of Environmental and Life Sciences there was held a ceremony of conferring the *Doctor Honoris* Degree of the Lublin University of Environmental and Life Science to Prof. dr hab. Mieczysław Adamowicz – Director of the Institute of Economy and Management at the Pope John Paul II State School of Higher Vocational Education in Biała Podlaska.

The ceremony was opened by His Magnificence Rector of the Lublin University of Environmental and Life Sciences Prof. dr hab. Marian Wesołowski, who welcomed all the guests. Laudation was delivered by the Promoter of *Honoris Causa* Doctorate – Prof. dr hab. Dionizy Niezgoda, who emphasized significant research and educational accomplishments of Prof. Mieczysław Adamowicz – an excellent scientist, son of the Lubelska Land, who owing to his outstanding capabilities, intellectual resourcefulness and immense diligence has significantly enriched the treasure trove of knowledge on the development of food economy in the country and abroad.

Next, a resolution of the Senate of the Lublin University of Environmental and Life Sciences was presented by Vice-Rector Prof. dr hab. Edward Pałys, while the diploma with the *Honoris Causa* Degree was read out and handled over to the candidate by the Dean of the Faculty of Agrobioengineering – Prof. dr hab. Stanisław Baran.

In the subsequent part of the ceremony, Prof. dr hab. Mieczysław Adamowicz has received congratulations from, among others: H.M. Rector of the Lublin University of Environmental and Life Sciences – Prof. dr hab. Marian Wesołowski, Rector of the Warsaw University of Life Science – Prof. dr hab. Alojzy Szymański, on behalf of Deans Board – Prof. dr hab. Barbara Baraniak, Dean of the Faculty of Economic Sciences Warsaw University of Life Sciences – Prof. dr hab. Bogdan Klepacki as well as representatives of the authorities of the Lubelskie Province and Marshall's Office.

Next, Prof. dr hab. Mieczysław Adamowicz took the floor by expressing his gratitude for this honorary degree to: authorities of the Lublin University of Environmental and Life Sciences, namely Rector Prof. dr hab. Marian Wesołowski and his predecessor Prof. dr hab. Zdzisław Targoński, to the entire Academic Senate, Deans of the Faculty of Agrobioengineering – Prof. dr hab. Stanisław Baran and Prof. dr hab. Edward Pałys as well as to all Members of the Faculty Board.

Professor Mieczysław Adamowicz expressed his deep appreciation and thanked to the authorities of his *Alma Mater*, *i.e.* participating in the ceremony Rectors of the Warsaw University of Life Sciences – Prof. dr hab. Alojzy Szymański, Prof. dr hab. Tomasz Borecki, Prof. dr hab. Jan Górecki, as well as other representatives of authorities of Universities and Faculties who have come from Warsaw, thus making the whole ceremony more splendid and confirming the recognition for the Lublin University of Environmental and Life Sciences. Gratitude was also expressed to Dean Prof. dr hab. Bogdan Klepacki, colleagues from the maternal Faculty of Economic Sciences and to Prof. dr hab. Marian Podstawa – Head of the Department of Agricultural Policy and Marketing, as well as to high officials from other universities, including H.M. Rector of the Agricultural University in Cracow – Prof. dr hab. Janusz Żmija. Especially warm thanks were expressed by Professor Mieczysław Adamowicz to the reviewers – Prof. Andrzej Czyżewski and Prof. Stanisław Urban, and to the promoter – Prof. Dionizy Niezgoda.

Warm words of gratitude for support and presence were expressed by Professor Adamowicz to the closest and numerous friends and acquaintances as well as sympathizers of the Lublin University of Environmental and Life Sciences who have joined the ceremony.

Next, Doctor *Honoris Causa* of the Lublin University of Environmental and Life Sciences Prof. dr hab. Mieczysław Adamowicz delivered a lecture entitled "Interventionism and development of rural areas and agriculture", in which he addressed developmental problems of agriculture and rural areas of the Lubelskie Province.

The ceremony of conferring the *Honoris Causa* Degree of the Lublin University of Environmental and Life Sciences was honored by the performance of the University Choir.

2. Merits of Prof. dr hab. Mieczysław Adamowicz in the area of research, educational and organizational activity

The analysis of the research activity Prof. Mieczysław Adamowicz had been engaged in enables distinguishing 7 research areas, including in chronological order:

1. 1965-1972 – problems faced by the agriculture of developing countries, especially the Arab countries, in that period Prof. Adamowicz wrote his Doctoral Dissertation entitled „Socio-economic transformations in the agriculture of Egypt after the II World War",
2. 1973-1975 – the role of institutions in the development of rural areas and agriculture in Poland; in that period Prof. Adamowicz prepared his Post-Doctoral Dissertation entitled "Farmers' Associations vs. the functioning of individual farms",
3. 1976-1991 – developmental tendencies in the world agriculture and international agricultural trade and their links with the food economy of Poland,
4. 1991-2001 – development of marketing systems and competitiveness on the main agricultural markets,
5. 2001-2005 – bases of the modeling of a balanced development of rural areas and agriculture,
6. 2005 and later – the role of knowledge, innovation and social capital in the development of rural areas and agriculture under conditions of international integration and globalization; the role of institutions and local authorities in building territorial competitiveness, the utilization of development strategy and territorial marketing, devising complex marketing products of a specified territory as well as support of the social capital through the development of group and territorial acti-vities, a network of cooperation, clusters and assemblies of resource-fulness; the latest focus of research interests of Prof. Adamowicz are consumer studies in respect of innovations, especially in the sector of fruits and fruit products.

Scientific achievements of Prof. Adamowicz encompass about 600 research works, including a number of books written, edited and co-written by Professor. In total, publishing achievements of Prof. Adamowicz account for about 500 publications, including *ca.* 350 theoretical works (monographs, studies, dissertations, articles, *etc.*). Amongst books published by Prof. Adamowicz, worthy of special attention are: „Egipt. Rewolucja społeczno-gospodarcza" ("Egypt. Socio-economic revolution") (1971); „Kółka rolnicze w rozwoju wsi polskiej" ("Farmers' Associations in the development of the Polish country") (1989); „Handel zagraniczny a rolnictwa" („International trade vs. agriculture") (1987); or „Ochrona konkurencji a rynek rolny" ("Protection of competitiveness vs. agricultural market") (1998). Prof. Adamowicz received the Minister's Prize for his Doctoral and Post-Doctoral Dissertations as well as for his book „Handel zagraniczny a rolnictwo" ("International trade vs. agriculture").

Prof. Mieczysław Adamowicz was a supervisor and coordinator of a number of research projects. His most significant Polish projects include:

- Developmental tendencies of the world agriculture and their links with the food economy of Poland. Resort Research Programme No. II.7, 1976-1990,
- Multifunctional development of rural areas at borderland areas, Institute of Rural and Agricultural Development of the Polish Academy of Sciences, 1990-1996,
- Polish Agriculture in the process of Poland association with the European Community, Project of the State Committee for Scientific Research, 1993-1996,
- Development of marketing systems on agricultural markets, Project of the State Committee for Scientific Research, 1997-2000,
- Adjustment of main Polish markets to integration with EU, Project FIESTA, 1998-1999,
- The role of enterprises, institutions and local communities in balanced development of rural areas and agriculture, Project of the State Committee for Scientific Research, 2001-2004,
- Adaptation of rural households to market changes and conditions of the European integrations. International Research Project of the USA, Poland, Slovak Republic and Hungary.

In addition, Prof. Adamowicz participated in 15 foreign research programmes, under which he was supervising the realization of activities undertaken by the Polish side. The most important ones include:

- Beef production In Eastern and South Eastern Europe, FAO, 1978-1979,
- Project PHARE of Support to the Minister of Agriculture and Food Economy in the area of affecting the agricultural policy through economic changes, 1998-2000,
- Increasing Fruit Consumption through a trans disciplinary approach learning to high quality produce from environmentally safe, sustainable method. Project ISAFRUIT under the VIth Framework of EU Research, 2006-2009.

Professor Adamowicz was additionally a head of 12 promotion projects of the State Committee for Scientific Research, being a basis to doctoral theses.

The list of Ph.D.s promoted by Professor Adamowicz (originating both from Poland and abroad) contains 30 names (by the year 2008) and is successively increasing. Worthy of emphasizing are also rich reviewing achievements of Prof. Adamowicz, including: 51 reviews in procedures of con-

ferring Doctor's degree, 24 reviews in procedures of conferring Post-Doctor's degree and 23 reviews in conferring Professor's degree.

Professor Adamowicz was a supervisor of over 600 M.Sc., M.Eng. and undergraduate theses. In his considerable academic achievements, Professor has been conducting classes addressing, among others, international economic relations, economic policy, economic geography, spatial development, tourism and recreation, agricultural policy, common agricultural policy of the EU, comparative economy of agriculture, competitiveness strategy, competitiveness protection, economy of cities and regions, territorial marketing, strategy of local development, *etc.* Recently, Prof. Adamowicz has also prepared programmes from regional policy, social policy, multifunctional development of rural areas and agriculture, and bases of the European integration. In each case, he was the creator of original programmes of studies and methodology of conducting classes. He has also implemented didactic programmes: TESSA, Jean Monet, Minerwa and Sokrates supported from funds of the European Union.

Professor M. Adamowicz has been developing cooperation with numerous research centres in Poland and abroad. He was paying longer visits as a trainee or a lecturer in Egypt, Italy, USA, United Kingdom and countries of the Central-Eastern Europe. He is a member of the International Association of Agricultural Economists and the European Association of Agricultural Economists. In the EAAE, he was twice holding the position of a member of the Programme Committee of European Congresses in Hague and Warsaw. He was also serving the function of an FAO expert in developing countries. In addition, Prof. Adamowicz is a member of the International Association of European Ideas, the New York Academy of Sciences, and the European Association of Contemporary European Studies. In 2007, he has become a member of the American Association of Agricultural Economists and the International Association of Agribusiness Managers.

Amongst duties and functions held by Prof. Adamowicz at his *Alma Mater* – Warsaw University of Life Science – worthy of special notice are: establishing the Department of World Agriculture, holding the position of Vice-Dean of the contemporary Faculty of Economic Sciences in the years 1978-1981; and then Dean of the Faculty in the years 1981-1987, as well as holding intermittently for 18 years the position of the Head of Department of Agricultural Policy and Marketing (from the 1st of January 1991 till the 31st of December 2008).

Over 46 years of work at the Warsaw University of Life Sciences, Professor Adamowicz was a member of various advisory boards, commissions and scientific boards (to the Ministry of Agriculture, President of the Republic of Poland, President of the Rural Development Agency, Scientific

Board of the Institute of Rural and Agricultural Development, Academic Senates of the Warsaw University of Life Sciences and Pope John Paul II State School of Higher Vocational Education in Biała Podlaska), and Editorial Boards (ZER, Wieś i Rolnictwo, Roczniki Naukowe SERiA, Publishing House of the Warsaw University of Life Sciences and Publishing House of the Pope John Paul II State School of Higher Vocational Education in Biała Podlaska *etc.*).

For his outstanding accomplishments in the research and didactic work, Prof. Adamowicz has been awarded with the Golden Cross of Merit, Knight's Cross of the Order or Polonia Restituta, Medal of the National Education Commission, Golden Badge of Merit to the Warsaw University of Life Sciences, and a Badge of Merit to the Agricultural University in Gődőllő. He additionally received several Minister's Prizes and a number of Prizes awarded by H.M. Rector of the Warsaw University of Life Sciences.

In justification to the application for conferring the *Doctor Honoris Causa* Degree to Prof. zw. dr hab. Mieczysław Adamowicz, Prof. dr hab. Andrzej Czyżewski and Prof. dr hab. Stanisław Urban pointer out the following arguments:

– expertise in operating with the methodology of global economy,
– integration of theoretical thought with effective analysis of empirical materials,
– interdisciplinary character of searches that enables combining different areas and majors of economic sciences, including the element of space; the capability of merging macro- and microeconomic, social and environmental issues,
– outstanding achievements of Prof. Adamowicz as a teacher and tutor of several generations of students attending his lectures and seminars,
– multi-dimensional organizational activity for the benefits of international cooperation; holding a number of responsible positions and functions in many educational and research institutions, supervision and coordination of ten or so domestic and international research projects and programmes.

Corresponding arguments were advanced by the promoter – Prof. dr hab. Dionizy Niezgoda, who additionally emphasized:

– appraisal to and comprehension of the theory; mastering – to an outstanding extent – capabilities of formulating and testing research hypotheses,
– Professor Adamowicz's attitude oriented to the creation of information significant to the development of food economy and theories with a different extent of generalization with consideration given to the discontinuity principle.

3. Activities for the benefits of the Pope John Paul II State School of Higher Vocational Education in Biała Podlaska

Professor Mieczysław Adamowicz has been bound with the Pope John Paul II State School of Higher Vocational Education in Biała Podlaska from its establishment in the year 2000. He has designed and implemented educational programmes from the major of Marketing, which he has been supervising from the very beginning. Over a very short period, Prof. Adamowicz has managed to promote 5 Doctors – staff members of the Institute, who have undertaken the following research problems:

– Role of non-governmental organizations and group forms of activities in diversified development of rural areas on the example of the Lubelskie Province – dr Ewelina Dresler,
– Adaptation of rural household to conditions of market economy – dr Agnieszka Siedlecka,
– Role of enterprises in multifunctional development of rural areas on the example of the Lubelskie Province – dr inż. Magdalena Zwolińska-Ligaj
– Competitiveness of territorial units on the example of Districts of the Lubelskie Province – dr Danuta Guzal-Dec
– Role of a District Government in accomplishing stable and balanced development of rural areas on the example of selected Districts of the Lubelskie and Mazowieckie Provinces – dr inż. Agnieszka Smarzewska.

Professor Adamowicz was an initiator and organizer of 4 international scientific conferences, including one co-organized with the Institute of Tourism and Recreation, and then an editor or co-editor of post-conference materials. He is very engaged in the promotion of young scientists of the Institute of Economy and Management at the Pope John Paul II State School of Higher Vocational Education in Biała Podlaska, as an initiator and co-author of manuscripts published in renowned Polish and international periodicals (as many as 28 manuscripts in the period of 2000-2007).