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Acquiring penmanship and writing skills from the first to fifth grade of primary school: Joined-up writing vs. Comenia Script

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Abstract

The project presented here deals with a typical human means of communication – writing. The aim of the project is to map the developmental dynamics of handwriting from the first to the fifth grade of primary school. The question remains topical because of the fact that several systems of writing have been used in the past few years. Our project focuses on comparing the systems of joined-up handwriting (the standard Latin alphabet) and the most widespread form of printed handwriting: Comenia Script. The research can be marked as sectional; pupils took a writing exam at the beginning and at the end of the 2015/2016 school year. The total number of respondents was 624 pupils, evenly distributed according to the school year, system of writing and gender. To evaluate handwriting, the evaluation scale of Veverková and Kucharská (2012) was adjusted to include a description of phenomena related to graphomotor and grammatical aspects of writing, including the overall error rate and work with errors. Each area that was observed included a series of indicators through which it was possible to create a comprehensive image of the form handwriting took in the given period. Each indicator was independently classified on a three-point scale. Thanks to that, a comprehensive image of the form of writing of a contemporary pupil emerged.

Key words: writing, italics, Comenia Script, scribal skills, writing skills, evaluation of writing.

Introduction

Writing and reading create the foundations of literacy; these skills develop at the same time. In comparison to readers' literacy, the research on writers' literacy lies at the margin of the interest of Czech researchers, although it is a publicly discussed topic.

Writing is a complex perceptual-motor activity that depends on the maturing and integration of cognitive, perceptual and motor skills. Some children enter school with knowledge of certain letters; the scribal and writing skills develop

during the learning of writing in the period of the development of initial literacy (Kucharská, 2014), i.e. approximately from the first to the third grade. In the fourth and fifth grades, writing should already be consolidated and automatized and a pupil should already be capable of independent expression through writing.

Kucharská and Veverková (2012) state that the development of writing varies between individual pupils. It depends on a number of factors: on the individual skills of a pupil in conditions for writing (cognitive conditions, perceptual maturity and graphomotor skills); further, on the personal characteristics of a child (motivation to write and resistance when overcoming obstacles); third, the experience of a child in the field of drawing as in drawing children “practise” writing strokes and gain awareness of writing. Finally, the actual method and methodology associated with writing play a great role, as does the support from the teacher and the family when acquiring scribal and writing skills.

In recent years, the visual quality of handwriting has begun to be discussed. The worsening level of handwriting and the necessity to modify the model script that is used have already been pointed out, e.g. by Šupšáková (1991).

From the experience of teachers and advisors it is obvious that both children and adults nowadays prefer a more simple form of writing (Wildová & Kucharská, 2014). At the same time, the interest of both schools and parents in the diagnosis of specific learning disabilities which, besides reading, occur in writing as well (developmental dysgraphia, dysorthographia), persists. The second and third grades are considered the most exposed time regarding the interest in confirming the diagnosis of a learning disability, although in the two following grades there are also cases when a child is sent to school advisory offices because of a problem with writing. Many children who have a problem with writing do not necessarily suffer from a specific issue with writing – it may only be the result of an incorrect method of writing, that is not joined up, or just an underestimation of the training that is necessary to acquire scribal skills. At the same time, there is no contemporary study that could provide space for a comparison – what the handwriting of children in the first five grades of primary school looks like on a continual basis, according to the grades. As was pointed out in the diploma theses by Kučerová (2014) and Kubín (2014), the error rate is still quite high and problems with writing are still quite frequent in children in the third grade.

We can say that the act of graphic designer Radana Lencová was a reaction to this state of things: she created an innovative printed writing system – Comenia Script – which is nowadays recommended as an alternative system to the commonly used Latin alphabet. The main aim was to provide a new system of

handwriting, together with a new methodology that would allow a simplification of writing, and therefore, provide better opportunities or practice and better quality of writing.

In relation to Comenia Script, we should not fail to mention a verification study run in 2010-2012 at the Faculty of Education, Charles University, led by Prof. Radka Wildová. From the first results it was obvious that the new method displays similar efficiency to traditional writing. The verification, however, applied only to children in the first and second grades of primary school. It is crucial to follow the development of handwriting in older children as well as the development of writing (the formation of a personal style) is not yet finished in the second grade.

Unfortunately in the Czech Republic no project has been realized so far to map the developmental dynamics of the scribal and writing skills of children in the first five grades of primary school. It is not only a matter of the developmental dynamics of writing in Comenia Script but also of “traditional” writing. There is also no information available about what the typical handwriting of children in particular grades looks like, which writing problems a child has to deal with, what the temporary issues with writing look like and when one can start to think about some kind of specific disruption of scribal and writing skills (i.e. dysgraphia and dysorthographia). Not all children who display partial issues with writing necessarily suffer from these specific problems; it is common to have problems when acquiring handwriting, and they should be solved through cooperation between the teacher and parents (Kucharská, 2007).

Aim

The present paper deals with the problematics of the development of handwriting in the first five years of primary school in terms of joined-up handwriting (standard Latin alphabet) and printed handwriting (Comenia Script). We present the first results of the analyses of the research study “The development of handwriting from the first to the fifth grade – joined-up handwriting vs. Comenia Script”, the aim of which is a description of the progress of the adoption of particular scribal and writing skills. Furthermore, we compare the developmental dynamics of the adoption of writing in joined-up and printed handwriting. We also deal with the issue of gender influencing the quality of handwriting. The last area we focus on is the evaluation of writing. Here we specify the evaluation criteria used to describe handwriting. To evaluate handwriting we used the scale of Veverková and Kucharská (2012), which was designed to evaluate the handwriting of first-grade pupils in such a way that it does not have to correspond fully to older children’s handwriting.

It has to be stressed that we do not want to characterize one type of handwriting or another as more proper but we want to call attention to possible specific features that appear in the course of the adoption of writing in primary school in the above-mentioned models of writing.

Research set and methods used

The research set (see Table 1) consisted of 624 pupils from nine primary schools in the Czech Republic (Prague, Central Bohemia, Liberec Region, Ústí nad Labem Region, Vysočina). In each grade we wanted at least 120 children (equally spread according to the type of handwriting), which we managed to fulfil in each grade except for the first grade – there we worked with ca. 80 children.

Tab. 1: Research set

<i>Pattern of handwriting</i>	<i>Grade</i>	<i>Number of pupils</i>	<i>Boys</i>	<i>girls</i>
<i>Joined-up writing</i>	1	39	16	23
	2	77	41	36
	3	75	35	40
	4	68	34	34
	5	78	36	42
<i>total</i>		337	162	175
<i>Comenia Script</i>	1	40	21	19
	2	58	29	29
	3	61	26	35
	4	68	30	38
	5	60	26	34
<i>total</i>		287	132	155

The schools were both urban and rural and varied in their structure from the point of view of sociodemographic indicators.

The research project can be classified as an overview. The data was collected during the 2015/2016 school year. As we were interested in performance shifts in particular subtests, the assigning of the battery of subtests went on at the beginning and end of the school year. In the first grade, we shifted the initial data collection to midyear, when one might suppose that the basics of handwriting had already been adopted.

The data collection was performed in a group and it never lasted more than two hours. Because of the children getting tired easily, we collected the data only during the morning classes.

The battery of tests contained three parts. The first was a scribal exam from the battery of diagnostic tests of literacy skills (Carravolas & Volín, 2012). In the first grade we assigned Writing words, in the second to fourth grades Scribal test 1 and in the fifth grade Scribal test 2. This division was chosen on the basis of the recommendation in the manuals accompanying these tests.

The second part of the battery of tests was a drawing exam – Test of figure drawing. Through this we wanted to map the level of graphomotor skills of individual writers. The last part of the battery of tests was a test of silent writing. Because of the different reading levels of our sample, we used two versions of the test. In the second grade we assigned the test “Big Friends” (Špačková & Kucharská, 2015), and from the third grade to the fifth grade we used the test “Going for a trip” (Kucharská & Vykoukalová, 2015). The reading test was not assigned to the pupils in the first grade. The battery of tests was the same in both waves except for the Test of figure drawing, which was not included in the second round.

For the initial processing and evaluation of the data that was gathered, quantitative methods were used. Because of the normality of the data, parametric tests were used.

Because of the size of the sample tested, it was necessary to have the individual pieces of writing evaluated by more evaluators. For that reason we did a pilot survey before the actual data collection and we verified the agreement among the evaluators. Thirty written pieces in total, selected at random (evenly distributed according to the model of handwriting) were cross-evaluated by four evaluators. The ICC index (intraclass correlation coefficient, Shrout & Fleiss, 1979) was used as the actual measure of the evaluators' agreement. The calculations of estimations and confidence intervals were performed with the ICC package (Wolak et al., 2015) for R (R Core Team, 2016) (see Table 2).

Tab. 2: Agreement of evaluators

ICC scribal skills	ICC = 0.985; 95% CI [0.974; 0.992]; F(29.90) = 265.4; p<0.0001
ICC writing skills	ICC = 0.994; 95% CI [0.99; 0.997]; F(29.90) = 710.8; p<0.0001

The ICC results above the level 0.9 confirm the very high level of agreement among the evaluators; therefore, it could be assumed that the evaluation criteria for the individual categories are well established.

Evaluation scale

In the evaluation of handwriting we adhered to four large fields, two of which were further divided internally.

1. Scribal skills (shape; the size of a letter in a word; the size of a letter in a sentence; adherence to a line; the slant of the text; slant in a word; quality of joining up letter; quality of the stroke; legibility)
2. percentual error rate (a “collecting” criterion in which the level of writing skills is reflected)
3. work with errors (an independent evaluation criterion; the ability to find a mistake and correct it)
4. writing skills (omission/addition of a letter; exchange of an uppercase letter for a lowercase one and vice versa; misplacement of letters in a word; the length of a syllable; diacritics; a mistake after a soft consonant; a mistake after a hard consonant; a mistake after an ambiguous consonant; punctuation and substitution of a letter).

Each criterion was evaluated on a scale from 0 to 2, with a higher number of points meaning higher quality of the feature in question.

In this paper we focus on presenting the results of the statistical analyses of the initial data collection and we deal with the field of scribal and writing skills.

Results in the field of scribal skills

Before the statistical analysis itself we verified the reliability of the subtest. Because the scores are ordinal, we counted the ordinal $\alpha = 0.72$ (Gadermann, Guhn, & Zumbo, 2012).

The rough score was calculated as the sum of the individual scores for six criteria. We did not include slant and quality of joined up letter, the former because Comenia Script (CS) does not state an “ideal” slant and children can use

whichever suits them, and the latter because it is “correct” not to attach CS model.

To count the differences between grades, writing method and gender, 3-way ANOVA was used (analysis of variance). None of the interactions proved significant on the 0.05 level; therefore, only the main effects of the grade, gender and writing method are interpreted.

Tab. 3: ANOVA scribal skills

effect	p
Grade	0.000
Pattern of writing	0.003
Gender	0.000
Grade x Pattern of writing	0.067
Grade x Gender	0.707
Pattern of writing x Gender	0.358

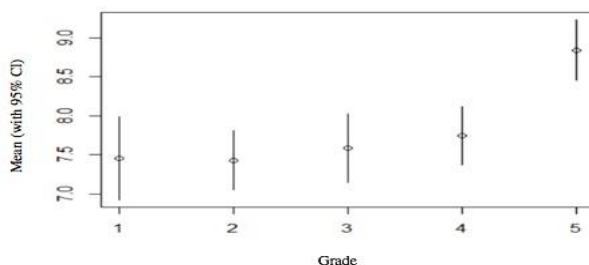
In the field of scribal skills the effect of the grade can be marked as significant – $F(4. 604) = 8.61$; $p < 0.001$; $\eta^2 = 0.054$ – which suggests that there are differences among grades. Post-hoc paired t-tests showed that the fifth grade (see Graph 1) is significantly different from all the others. In the other grades, no difference was proved. Overall, it can be stated that the differences among the grades are not too large, which is also indicated by the quite small size of the effect (0.054); about 5.4 % of the entire variance in the writing test could be explained by integrating the grade into the model.

Another effect we followed was the effect of gender (see Graph 2). On the basis of the statistical analysis we consider it significant as well: $F(1. 604) = 9.18$; $p = 0.0025$; $\eta^2 = 0.015$. In general, girls ($m=8.5$, $sd=2.33$) score better in the test than boys ($m=7.12$, $sd=2.32$). The higher the score, the better the formal shape of the handwriting is. The effect is, however, quite small – it explains only 1.5 % of the total variance.

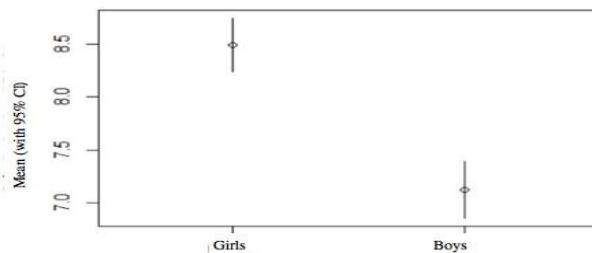
The last field to be observed is the effect of the system of writing (Graph 3), which also showed itself to be statistically significant: $F(1. 604) = 53.59$; $p <$

0.001; $\eta^2 = 0.081$. Children writing with Comenia Script ($m=8.14$, $sd=2.34$) score higher than children writing with joined-up writing ($m=7.58$, $sd=2.46$). Moreover, this effect is the biggest in terms of the explained variance (8.1 %) of all the effects that were observed. Because of the absence of interrelationship with a grade we think that the difference between the systems of writing is similar in all grades.

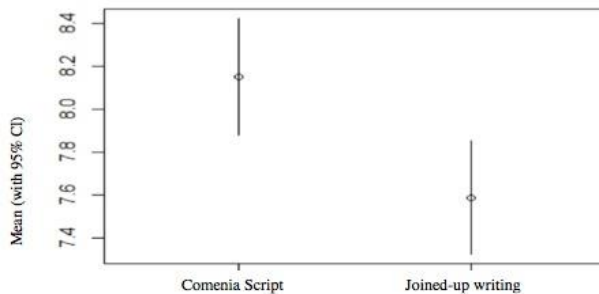
Graph 1: Difference among grades in the scribal test



Graph 2: Difference between genders in the scribal test



Graph 3: Difference between pattern of writing in the scribal test



Results in writing skills

In the subtest of writing skills (i.e. those related to the application of grammatical rules) we also first proved its reliability. Because of the ordinal character of the data we counted ordinal $\alpha = 0.81$ (counted from all 14 entries on the subtest given).

The score in the grammar test was counted as a sum of the individual scores for the criteria for the grade in question divided by the number of criteria that were followed in the grades. In the first grade there were eight criteria, from the second to the fourth grade 10 criteria, and in the fifth grade 14 criteria. The score thus gains values from 0 to 2.

For the analysis, a similar method to that used for the test of scribal skills was used. We calculated 3-way ANOVA with the following factors: grade; gender; writing method.

Table 4: ANOVA writing skills

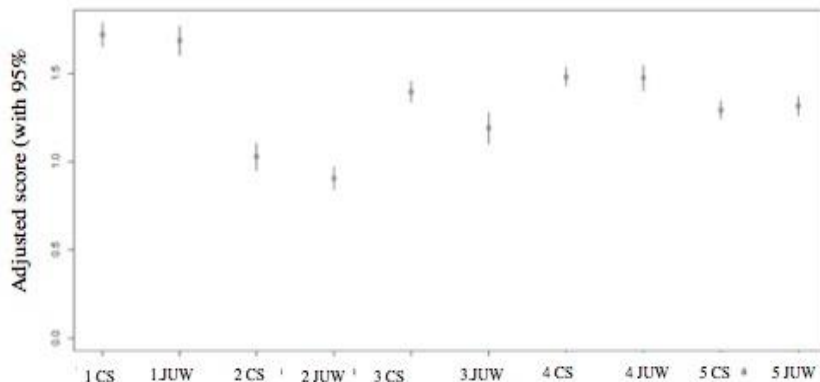
effect	p
<i>Grade</i>	0,000
<i>Pattern of writing</i>	0,002
<i>Gender</i>	0,000
<i>Grade x Pattern of writing</i>	0,003
<i>Grade x Gender</i>	0,275
<i>Pattern of writing x Gender</i>	0,304

Regarding the fact that a statistically remarkable interaction of the grade with the system of writing was displayed ($F(4.604)=3.89$; $p = 0.0039$; $\eta^2 = 0.025$), it is necessary to consider the finding below. It means that the differences in grammar among children writing in Comenia Script and those writing in joined-up handwriting are not stable through the different grades.

A more detailed analysis showed (t-tests comparing children within individual classes according to the writing method), that children in the second and third grades differ if we compare them according to the writing method. Children in the second grade who used Comenia Script ($m=1.03$; $sd=0.298$) achieved higher scores than children using the joined-up writing system

($m=0.91$; $sd=0.286$); $t(120.18) = 2.399$; $p = 0.0179$. In the third grade, a similar difference occurred; children using Comenia Script ($m=1.4$, $sd=0.24$) were more successful than children using the joined-up writing system ($m=1.19$, $sd=0.389$); $t(125.65) = 3.813$; $p = 0.0002$. Differences were not observed in the other grades (all $t < 1$).

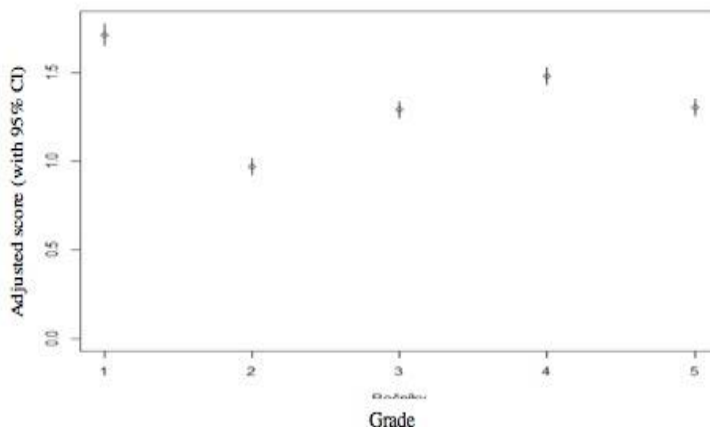
Graph 4: Differences among grades in an interrelationship with the pattern of writing



The analysis of the dispersion showed a great effect of the grade: $F(4.604) = 105.81$; $p < 0.001$; $\eta^2 = 0.41$. After adjustment of the overall score within the grades for gender and the system of writing, the differences (pairwise t-tests) among the individual grades were calculated. The differences among all the grades were significant (even after Bonferroni's correction to the level 0.005 – 0.05/10) except for the third and fifth grades mutually. Graph 5 illustrates the average scores in the grammar test. The least difficult is the writing test for the first grade. From the second to the fourth grade there is a gradual improvement. The difficulty of the grammar test for the fifth grade is comparable to that of the one for the third grade. We point out that writing tests with three levels of difficulty were assigned. The easiest was assigned in the first grade. The middle level was assigned to pupils from the second to the fourth grade. The most difficult option was the one for pupils in the fifth grade.

The effect of gender also proved significant in the writing subtest: $F(1.604) = 13.91$; $p < 0.001$; $\eta^2 = 0.023$. The girls ($m=1.36$; $s=0.35$) attained higher average scores than the boys ($m=1.26$; $sd=0.39$). Because of the absence of interrelationship with the method of writing and grade, one can state that the effect is constant across grades and types of writing. This effect is, however, rather small (gender explains ca. 2.3 % of the variance in the grammar test).

Graph 5: Writing skills related to grade



Conclusion and summary of the results

The research project described here aims to map the field of the development of handwriting during the first five years of primary school. It is the time when a pupil acquires and refines the skill of writing. Since 2012 (after two-year piloting by the Czech Ministry of Education) we have also been able to find a printed system of writing – Comenia Script, designed by Radana Lencová.

In this project we do not want to characterize one system or the other as better or worse; rather, we want to map the developmental dynamics of scribal and writing skills in both systems. We want to describe the fields in which they differ and vice versa.

If we sum up the initial results, we can claim that for certain criteria the joined-up and the printed models differ significantly.

In the area of scribal skills (these connected with the form/layout of handwriting) we marked the effects of gender, grade and the system of writing as statistically significant. It was no surprise that girls have neater handwriting than boys. The difference was confirmed in all five grades. This difference may be caused by better hand-eye coordination or finding copying the model to be easier.

In the area of the effect of the grade on the quality of scribal skills we discovered a significant difference no sooner than in the fifth grade.

In terms of the effect of the system of writing, it could be expected that pupils using Comenia Script would achieve better scores. This difference appears significant in each grade. The explanation can be seen in the very character of the new model as Comenia Script was designed to be a graphomotorically easier variant of standard joined-up handwriting. For that reason it is probably to be expected that a pupil will adopt its shapes faster and better.

In the observed field of writing skills (using grammatical rules) there is a statistically remarkable correlation of the grade with the system of writing: that could be interpreted such as the differences between system and grade are not stable. Different results are obtained by children in the second and third grades. It means that pupils using Comenia Script make fewer grammatical mistakes than children who use joined-up handwriting. In the fourth and fifth grades the differences are eradicated, and the results become equal. We also explain this fact through the lower graphomotor demands of Comenia Script. Pupils who write with this model acquire it more quickly, and therefore, they can focus more on the application of grammar rules.

In further phases of the research we want to pay attention to qualitative analyses of individual criteria and capture their developments within grades (thanks to the two waves of data collection).

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Self-reference in early speech of children speaking Slovak

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Abstract

The study focuses on the process of being aware of own I in children acquiring Slovak language at an early age and living in a Slovak family. The aim of the research is to understand the process of acquiring the means by which children refer to themselves in the interaction with an adult person. The research uses the qualitative longitudinal method of individual case study. A child's speech is researched from the very first occurrence of a self-reference mean in 16th month up to the upper limit of early age (36th month) and all that is based on audio-visual records transcripts. The following are researched: (a) succession of self-reference means acquisition in early childhood, (b) function of self-reference linguistic means, (c) process of child's self-awareness. The results obtained based on the linguistic data in Slovak language are compared with the results of similarly focused researches in English, French, Polish, Russian and Bulgarian language. The research reveals some constants in the development of self-reference instruments that can be observed throughout various language-cultural environments. The research is a part of solutions within the grant project VEGA 1/0099/16 Personal and Social Deixis in Slovak Language.

Key words: self-reference, self-awareness, speech development, early age, Slovak language.

Introduction

At a human's early age there is a period importance of which is assimilated to the Copernican Revolution in psychology (Piaget & Inhelder, 2014, p. 20-21). This analogy refers to the commencement of consciousness of own I, thus a discovery that there is a limit between the internal (that means my) world and the outer world.

Awareness of own *I* is, most likely, possible only in comparison with *not-me* and this opposite has various forms: *I* and *you*, *mine* and *yours*, *own* and *somebody else's*, but also *near* and *far*, *known* and *unknown*. These opposites structure our day-to-day existence: starting with experiencing the feeling of closeness to

persons providing safety, care and contact at an early age, ending with mistrust against human otherness, fear of anything foreign or xenophobia.

The opposition of *I* versus *you* has, exclusive of any psychological and anthropological aspect, also a linguistic dimension. It is researched which role in constitution of opposition of *I* versus *you* is played by linguistically differentiated and culturally determined linguistic means using which the communication partners refer to themselves and other persons participating and not participating in communication (personal deixis; Levinson, 1983, p. 62, 68-72). The correlative term is a social deixis that reflects the differences of communicants arising from their social roles, status, relations between the speaker and the addressee or the speaker and the referent (ibid., p. 89-93). Instruments of personal and social deixis became the subject of numerous foreign researches focused on adult speech but also on how they are acquired by children in the process of ontogenesis of speech.

The aim of this study is to contribute to cognition of one aspect of personal and social deixis in the ontogenesis of speech of a child at an early age learning Slovak language. This aspect refers to oneself. The aggregate of non-verbal, lexical and grammatical means using which a child refers to himself at the time of a speech in the speaker's position and which say about consciousness of own *self*, can be defined as self-reference. Research on that is remarkable from various points of view:

a) The variation of attention between aiming one's attention to *I* and *you* is a constitutive element of dialogic interaction. That is why researching on development of self-reference means in child's speech, development of child's self-awareness and discourse competence (ability to participate in a dialogue) are also revealed at the same time.

b) The deictic expressions *I* and *you* are specific reference means. In the moment of speaking, they refer to individual participants of the speaking act, however, they do not identify a unique person, but his/her communication role. The pronoun *I* refers to each person in the speaker's role, the pronoun *you* refers to any person in the addressee's role. Therefore, the usage of personal pronouns *I* and *you* presumes not only the child's ability to identify persons (also proper nouns require it), but in addition, the ability to notice changing roles in interaction. Another particularity of personal pronouns is that during interaction alternations they require the change of speaker/addressee's perspective and use them in the mirror way: while the mother refers to herself using the pronoun *I*, the child is expected to refer to the mother using the pronoun *you* and vice versa. Changing the speaker's and addressee's perspective uniformly relates to the verbal person, personal pronouns in plural *we*, *you*, possessive pronouns *my*,

your, our, your (Pl), and that in all forms and mutual combinations. A sample of authentic communication between a child at an early age and an adult person documents that intentional simulation on the side of the adult person does not automatically lead to changing of perspective when using pronouns. At the beginning, the child inclines to own name with which the change of perspective neutralizes (1):

- (1) child: These all are mine.
 father: Mine.
 child: No.
 child: Mine.
 father: What mine? Then whose? Mine or yours?
 child: (quiet).
 father: Mine or yours?
 father: (while pointing to the child).
 father: Who are you?
 child: I am Janka.
 father: So, whose are they?
 child: (after a while) Janka's.

c) The majority of foreign studies focusing on ontogenesis of personal pronouns originated on the basis of a so-called non-pro-drop language (from "non pronoun-dropping"; language in which a personal pronoun is an obligatory part for identifying the verbal person). From the point of using personal pronouns, Slovak is one of the pro-drop types (from "pronoun-dropping"). Verbal persons are definitely distinguished by a grammatical morpheme and so the personal pronoun can be omitted ("*kreslí-m*" in 1st person Sg. : "*kreslí-š*" in 2nd person Sg.).

Previous research

The research focusing on learning personal pronouns in the non-pro-drop languages is continual and extensive, oriented to the following aspects:

- a) relation between the ability of children at an early age to change the perspective of the speaker/addressee and the overall development of grammatical competence (Huxley, 1970);
- b) relation between changing pronouns *I* and *you* and the ability to orient oneself in the space (Tanz, 1980, p. 49-69);
- c) discovering the reasons that prevent children from learning changing the perspective (phenomenon known as *pronominal reversal*; Evans & Demuth,

- 2012, p. 162-191) and studying the agents supporting the change of perspective in a dialogue such as other person's voice, the position of people, the dialogue (Orvig & Morgenstern, 2015, p. 155-180);
- d) unconventional (= different from adult speech) and conventional means of personal deixis e.g. in French and English (Brigaudiot et al., 1994, p. 123-131), in German and Dutch (Sekerina, 2015, p. 213-239);
- e) relation between children's ability to use personal pronouns, social cognition and the theory of mind (Wechsler, 2010, p. 332-365);
- g) pragmatic functions of early *I*-statements (Caët, 2012, p. 77-93).

In pro-drop languages, the research focuses on the relation of verbal flexion and personal pronouns: in Czech (Markova & Smolík, 2014, p. 61-79), Bulgarian (Stoyanova, 2009, p. 1-23), Polish (Smoczyńska, 1992, p. 203-228), Russian (Kiebzak-Mandera, 2008, p. 319-344), Russian compared to English (Gagarina, 2008, p. 229-259), Serbian (Savić, 1972, p. 59-67). While in foreign literature the means of personal and social deixis are the subject of the individual and comparative, longitudinal and experimental research, in Slovak the research of learning deixis at early age is only at the beginning.

Aims of the study and research questions

The aim of the research is to understand the process of learning means by which children learning Slovak refer to themselves. The study focuses on 3 main questions: (a) What is the succession of learning self-reference means at the early stage of speech development of in a child speaking Slovak? (b) What do self-reference means tell about self-awareness? (c) What are the specifics of the process compared to the results of researches in other linguistic-cultural environments?

Methods of the study

The material basis consists of audio-visual records of communication of one child in her family environment made by parents of the child aged from 5th to 36th month. Within the records, each month is represented by a one-hour record of the child's communication with adult persons in ordinary situations of family life (play, eating, bathing, walk, visit). There is a transcript made from every such record by the means of literal and commented transcripts in the system Child Language Data Exchange System (CHILDES; MacWhinney & Snow, 1990, p. 457-472). The one-hour record transcript contains in average 1700 statements of the child and adult persons. The audio-visual records and transcripts of the communication present the trimodal corpus consisting of visual, acoustic and

transcribed data catching spontaneous communication. The data corpus is the source for the longitudinal research method. The coding method is used to analyse the data. Each non-verbal, lexical and grammatical mean used by the child to refer to himself has been assigned a specific code as from the very first occurrence of a self-reference mean in 16th month up to 36th month (early age limit). In total, there were 1476 statements registered in the transcripts in which the child referred to himself. The subject of the research is statements containing self-reference, but always as a part of the context in which they occurred. To illustrate, the samples of transcripts with the person marked (*JAN/child, *MOT/mother, *GMO/grand-mother, *FAT/father) and the child's age (e.g. 1;03.15 = one year, three months and fifteen days) are used.

The aim of the research is not to verify hypothesis and to generalize their validity within the population of Slovak children, but the opposite – to formulate hypothesis on self-reference development. The qualitative research method or, more precisely, the individual case study with a so-called “dense description” corresponds the aim. It catches the development of one child's speech but with many data in connection with verbal and non-verbal manifestations of the child in interaction and situation context.

The quantitative method was used to increase to reliability of the study conclusions. The information on using the pronoun *I* was provided by parents of 1062 children aged 18 to 36 months. Presently, the data is freely available as a part of the database *Wordbank. An open database of children's vocabulary development* (Frank et al., 2017, p. 677-694).

Data analysis and results

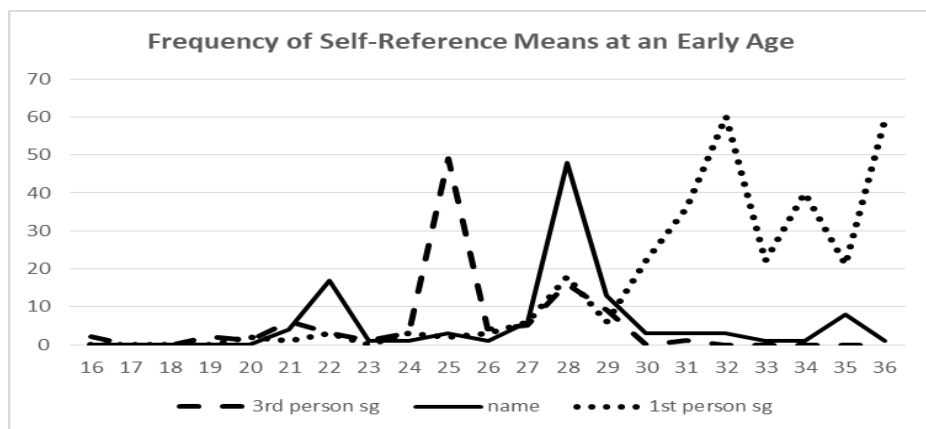
1. The adults' focus on children

Before a child starts to produce self-reference means it is interesting to observe how adults turn to a child as a partner in a dialogue. The noticeable feature is the intensification of the means referring to the child. It manifests itself as changing verbal persons, verbal manner, singular and plural and various child's name forms by the parents. In example (2) the adult person combines 2nd and 3rd person singular indicative, imperative symbiotic plural and two forms of the child's name in the way that in 9 statements there are 11 means referring to the child. All the referential means of the adult persons progressively become the self-referential means of the child. And the question is, how the child orientates himself in this variety of linguistic means and how they progressively become the means of child's own active vocabulary.

- (2) *GMO: So where does Janinka have many cars?
 *JAN: ú.
 %act: Janka takes the cars out of a box.
 *GMO: There you have many cars.
 *GMO: Will you put them here into this box?
 *GMO: So, put.
 *GMO: Will we pour the cars out?
 *GMO: We will pour.
 *GMO: We will pour # this way.
 *GMO: There Janka has many cars.
 *GMO: Will you put everything in there?
 *JAN: Hm.
 %act: Janka transfers the cars from one box into another one.
 age: 1;03.15

2. Reference to oneself as reference to others

In the early stage of self-reference development a child refers to himself as to any other person, i.e. by the 3rd verbal person and a name. This non-conventional way of self-reference lasts more than a year (16th to 29th month) and after that, the dominant mean becomes the 1st person sg. as the conventional mean of self-reference in Slovak (Graph 1).



Graph 1: Frequency of 3rd person sg. child's first name and 1st person sg. as self-reference means in a one-hour record of communication between the child and an adult person (child aged 16th to 36th month)

Self-reference by 3rd verbal person is first presented by mostly imperfective verbs using which the child verbally accompanies elementary demonstrations of biological functioning, movement and the status of (non)ownership of a thing in the “here and now” situation (*has, doesn't have, eats, sits, will give/gives, flies, goes, drinks, sings, dances*). After the second year, the perfectives are on the increase in expressions of the child's intention associated with the body and movement in the near future (*will wear, will take away, will choose*). The orientation to physical *I* is dominant in self-reference by 3rd person. Less frequently, it is used by the child to refer to absence of ability necessary to reach a goal (*cannot open the door*). In the initial stage of self-reference development a tendency to adapt to adult persons' speech (speech entrainment) is observed. When the child uses 3rd person in the self-reference function, the adult repeats it and extends the statement using the child's name (3). In the following stage, the name becomes a self-reference mean used by the child. Adult's relation to speech is mentioned because self-awareness and reference to oneself presume a partner against whom an individual can be demarcated. At the same time, the interaction with an adult provides a guideline for orientation in linguistic means.

(3) *GMO: Click and we will sew a red apron, a nice apron.

*JAN: Wears.

*GMO: Janka will wear it.

age: 2;01.01

Graph 1 documents a temporary increase of 3rd person sg in 28th month. Quantity correlates with quality of the mean: 3rd person sg fulfils the self-reference function in a play with pretence of roles. The child refers to himself, but in a played role (child in the mother's role: *gives as mother, hangs*). Such a case is considered as quasi-self-reference, a played one or false self-reference. Using 3rd person in played self-reference is observed when the child uses conventional self-reference means: 1st person sg, pronouns *I, my, you are, with me, we, to us*. Despite this, when pretending the role, the child goes back to 3rd person sg, that is the first self-reference form from the point of development. Using 3rd person sg in a played self-reference is interpreted as demonstration of distance from a pretended and thus fictive role. In the communication function „me as somebody else“ 3rd person sg reaches its peak and eliminates from child's speech.

The preference of 3rd person sg in the self-reference function can result from corporeality (verbs in the 3rd person sg primarily present semantics of biological functioning, movement and activities associated with the body) and as well its “advantageousness” for the user at an early age (as opposed to 1st person sg no

changing of the speaker's and the addressee's perspective is needed, it neutralizes in 3rd person).

3. Self-reference by a name and inception of social I

Before the second year of age (22nd month) the child presents first manifestations of proprial self-reference (=reference to oneself by a name). It is created in aggregate with the tactile hand gesture. The first manifestations of proprial self-reference have doubled verbal – non-verbal nature. It is a complementary association of a gesture and a name in which “a word as a sticker names the similar content as the gesture” (Kapalková, 2008, p. 187). Pointing to someone/something belongs to first deictic gestures of transcultural nature that is registered by Kapalková (ibid., p. 183) in Slovak children aged 8th to 9th months. However, pointing to oneself can be observed with approximately one-year distance: the child turns the fingers of both hands to himself, touches the body and says her name. Referring to oneself is created along with understanding the pronoun *you* in a situation that induces positive emotionality (4a) and reciprocity (4b).

(4a) *MOT: This ball.

*JAN: Vava (=Jana).

%gpx: Janka touches herself with own hand.

*MOT: Úúú you are very skilful.

*JAN: Vava (=Jana).

%gpx: Janka touches her belly with both hands and smiles.

*MOT: Úúú you are very skilful!

age: 1.09.17

(4b) %gpx: Janka touches her mother by the hand.

*MOT: *This is mummy's hand.*

%gpx: Mother touches Janka by the hand.

*MOT: *And this is ... ?*

*JAN: Vava (=Jana).

*MOT: *Janka's.*

age: 1.09.17

Proprial self-reference of a child is a milestone after which mother's self-reference changes. The frequency of the appellative *mama* (*mama will help you*) significantly decreases (Brestovičová, 2016, p. 129, Graph 1). In other words, simplified self-reference is in remission which is identified by the mother in a

unique and constant way (the appellative *mama* identifies a person while the 1st person sg and the pronoun *I* identify a communication role). While a child refers to himself using 3rd person (up to 22nd month), mother uses the appellative *mama* in self-reference 7.7-times more frequently than the pronoun *I*. When the child starts to refer to himself by own name, the preference of the appellation *mama* decreases (23rd – 32nd month: 5.7-times more often *mama* than the pronoun *I*).

The stimulus for the change in mother's speaking behaviour is due to the essential breakthrough in child self-reference. The deictic self-reference gesture together with a name are evaluated as outer manifestations of awareness of own existence. Own name has not only a naming function, but primarily the identification function. Using her name, the child demarcates himself as an autonomous individual in the social world. The actual data show that a name is created in a reciprocal contact with an adult and together with understanding the pronoun *you*. That is why a name in the self-reference function is considered to be the beginning of creation of social *I*.

4. First verbal person as a conventional self-reference mean

1st person sg is created in parallel with own name (Graph 1). The motive for its usage is the child's need to share own intentions to act with adults. The first verbal person tells about the child's decision to reach an aim (*I will give, bring, open, comb, try, scoop up*). The focus on actions in the near future means that the child overcame so-called physical actions (= a state in which she does not think about what he is to do and completely engages himself in the action itself; Piaget & Inhelder 2014, p. 18). Physical actions are switched by actions with a conscious intention. The second motive for using 1st person sg is experiencing a deficit problem that is either caused by physical or mental discomfort (*I cannot see, hear, I do not know*) or absence of an object needed to reach the aim (*I don't have*). In next development the social dimension of forming *I* comes to the fore. The first verbal person is repeatedly registered in the following forms:

- a) social conventions (*thank you, here you go*);
- b) modal aspects of actions (*I want, I can, I have to*);
- c) contrast between the social environment and own self (increase of verbs in negative: *I don't want, I am not going, I won't give, say, twist, I haven't had breakfast*);
- d) speaking for another person (for grand-mother: *I will give you one more little piece*; for father: *I am videoing Janka*).

The functions a) – d) show that the first verbal person is learned in the social context starting with learned social statements up to the conflict between own self and the social environment. The contrast of *I versus you* goes through the

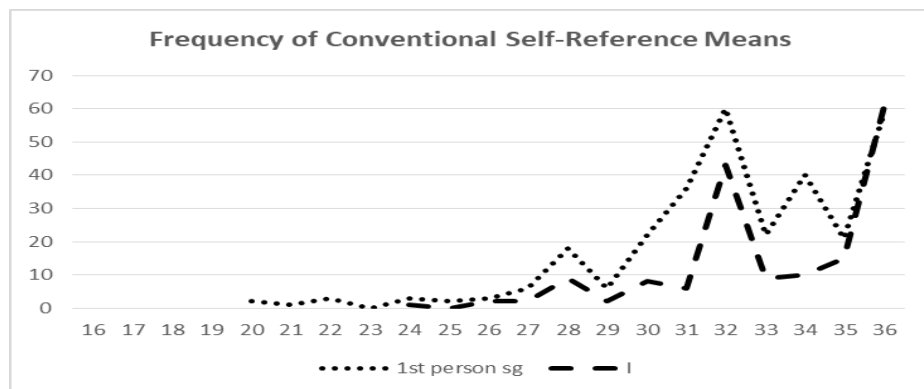
stage of disaccord and refusal and then results in the combination of means referring to oneself and the addressee in the same statement (*Do you think that I am cooking chocolate?*).

From the grammatical point of view, time differentiation of 1st person forms increases.

This form is preferentially realized as an intention expressed by synthetic future of perfective verbs (*I will comb*). The time paradigm is supplemented by preterite oriented to the achieved result (*I have painted, I have cut, I have taken away, I have already eaten, I have poured, I have given, I have decorated, I have chosen, I have taken out, I have told*). In 30th month, the analytic future tense relating to an action with distant temporal perspective from the moment of speech (*and after that I will cycle*) is registered. Verbs in 1st person sg are semantically enriched by cognitive verbs (*I will recognise, I have forgotten, I have made a mistake, I think, I remember*). While 3rd person sg refers to physical actions, the 1st person sg means the step to the reference to mental actions.

5. Pronoun *I* as another stage of social *I* development

The form of 1st verbal person is the stimulus for production of pronoun *I* (first occasional occurrence in 24th month; Graph 2). In Slovak as an inflected language, the reference to a speaker is coded in the grammatical morpheme *-m*, so the pronoun *I* is a facultative and non-economical component of self-reference from the point of grammar.



Graph 2: Frequency of 1st person sg, verb and the pronoun *I* as self-reference means in a one-hour record of child's communication with adults (child's age: 16th – 36th month)

Then, what is the motivation for using explicit self-reference (combination of a verb and the pronoun *I*)? The analysis of contexts uncovers social and pragmatic motivation.

Social motivation means that the child expresses information not only with regard to contents but also the relational dimension of a dialogue i. e. with regard to social distance from the partner in communication. The proof thereof is provided by two types of interaction contexts as the opposition to social closeness – social distance.

The first usage of *I* is recorded in repetition as the mean to express togetherness, social contact and closeness. They are rejoinders like *me too* (5a) saying about the need for affiliation to and social experience of the world with an adult person. The need for closeness is also expressed as attracting an adult's attention in a situation when the child is not in his/her visual field and/or the adult is occupied with another activity (5b).

(5a) *FAT: I can hear a train.

*JAN: I can also hear a train.

age: 1.11;17

(5b) *FAT: And now I will go with the pawn and shoot your pawn.

%com: Father manipulates with chess pieces.

%com: Child is not interested in the game of chess, she is trying to open a box.

*JAN: I am opening like this and I am closing like this.

age: 2.07.15

On the other side the explicit self-reference appears when the child is emphasizing on her own contribution to a common activity with an adult or to a common result (6a). The child demarcates herself more significantly against the social environment in the contrasting position when she corrects the adult person, does not agree, refuses, presents her will i.e. when the social distance from the adult person enlarges (6b).

(6a) *MOT: And we are painting.

*MOT: Thiiiiis way.

*JAN: I am putting into soil.

age: 2.06.18

- (6b) *MOT: What are you going to build, an anthill?
 *MOT: Are you going to build an anthill?
 *MOT: We are going to build.
 *JAN: I don't want to.
 *MOT: No?
 *JAN: But I will jump.
 *MOT: Jump?
 *JAN: I am jumping.
 *JAN: I am jumping around it.

age: 2.07.15

The interaction contexts (5-6) show that the awareness of own *I* is continuously created in two perspectives: the egocentric one that presents the demarcation of oneself against surroundings (*I* versus *you*), but also the contact one that reflects the need to belong to someone and to experience the world jointly (*I* and *you*).

Pragmatic motivation is presented by child's communication intentions understood as an aim that the child is to reach by the statement. Pragmatics of child's *I*-statements is researched in connection with pragmatics of mother's speech focused on the child which is the most frequent interaction context for her. (Pragmatics of *I*-statements of the mother of the same child, whose speech is under research in this study, was studied by Brestovičová, 2016, p. 131-135.) Preferentially represented pragmatic functions (PF) of *I*-statements of the child and her mother are partially identical, partially specific (Table 1). Preference means that four functions present 75 % of all context realisations recorded in the transcripts from 6th to 36th month in the mother's speech and from 24th to 36th month in the child's speech.

	child	mother
intention	+	+
text routine	+	+
will	+	-
refusal	+	-
attitude	-	+
speaking for another	-	+

Table 1: Central pragmatic functions of *I*-statements in child-mother communication (+ dominant representation, - peripheral representation in communication)

Intention and text routine are dominants of PF in the child as well as the mother. An intention can be interpreted as a decision to do something. Mother informs a child about her actions in the near future, she accompanies the child by words during activities that she is to do, prepares the child for them, tries to attract her attention and participation. The intention in the speech of monitored child's mother is the most preferred pragmatic function of *I*-statements at all. Through the PF intention, the mother presents the world to the child as a sequence of intentional activities that she has decided to do (*You know Janka, I am going to cheer you up 6th month; I will open it for you and let's put the beans in 14th month; and I will finally comb your hair 25th month; choose for me and I will sing and we will record 30th month; so I will taken them 35th month*). The child verbalizes her intention when she is attracting the attention of an adult or when child's efforts for autonomy in actions did not meet with acceptance on the side of the adult (7). While the mother acts in the role of a companion around the world of adults' actions, the PF intention is the mean to achieve attention and autonomy for the child.

(7) *MOT: So, cut your cabbage and celery.

*JAN: I will grind!

*MOT: Aha.

*sit%: Mother wants to help the child.

*JAN: I will grind.

age: 2.08;15

The text routine is presented by the statements that mother reproduces/reads and the child repeats/imitates (*...and I would thread, if I had such legs*, passage from a song). They present imitation of *I*-statements that the child reproduces as text blocks and that is why it is not possible to decide whether the child understands individual components and what their real effect to active production is.

PF will and refusal with the typical structure *I + I (don't) want* are dominants in child's speech. This structure presents a prototype of negative demarcation of oneself towards surroundings (8a) and it is specified as a mean to express will to own/not to own an object (*I want this, I don't want to have a teddy*), to achieve certain situation (*I want it to be open*), decide on the selection from alternatives (*I don't want to go up anymore*). On the contrary, PF will in mother's statements is rare (only one occurrence in 30 records). But, it is important to say that negative demarcation in child's speech becomes softer, namely in the way that the child expresses the purpose or cause of her will or refusal. The reasoning is enhanced

by development of syntactic relations (operators *because*, *in order to* start to appear), but mainly, it is a demonstration of forming empathy and tact towards a partner, i.e. the ability to see situations from the addressee's perspective. Firstly, the syntactic demandingness of a statement and the newness of pragmatic function cause that the child temporarily "returns" to the primary self-reference by the name (8b).

(8a) *GMO: Come, let's have a look at how beautiful tulips we have here.

*JAN: I no!

age: 2.06;18

(8b) *GMO: So give a small one.

*JAN: This is not for Janka because I am working with that.

age: 2;05.15.

PF speaking for another and attitude are specific central PF in mother's speech. Using the pronoun *I* in speaking for another person provides the child with an illustration of the pronominal self-reference function. Any person in the role of a speaker is referred to using the pronoun *I* by the mother (*I am a pig, look, I have nice red paws* 10th month; *I am a brave foot soldier and I will not leave it like that* 33rd month). By the end of the early age, speaking for another becomes a part of a role play or narration also in the child's speech (*I am a big elephant – and I am a teddy hungry already*). Child's ability to use the pronoun *I* in speaking for another is considered evidence that the child starts to understand the nature of pronoun *I*. Until then, she used it only as an individual identification mean. However, in speaking for another person she uses the pronoun *I* in self-reference for everyone who acts in the communication role as a speaker.

To the central PF statements of mother also belongs attitude, namely the preferential one (*Actually, I should have rather taken the warm trousers.*) or a doubt associated with care about a child (*Oh, but whether I am able to dress you in it – So, I don't know if it tastes you*). In child's speech the expression of attitude starts to appear rather sporadically but definitely before turning 3rd year of age. The linguistic indicator is *rather* in the preferential attitude (*I would rather prefer the cabbage one*).

A child, whose speech is the object of the longitudinal research, sporadically uses the pronoun *I* from 24th month; by the end of early age its frequency significantly increases (Graph 2). Let's compare the data from the case study with quantitative data from the parent's questionnaire. Table 2 shows that in 24th month the pronoun *I* is registered by two thirds of children's parents in the

sample. By the end of early age the share of children in which parents can see the pronoun *I* in production culminates between 89-100%. From the point of quantitative data and time limits the speech development in the monitored child can be deemed typical.

Age of children in months	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
Percentage of children producing pronoun <i>I</i>	66	73	76	78	88	77	87	85	86	83	100	91	96	89	100

Table 2: Percentage of children aged 22 – 36 months from the sample N = 1062 children, whose parents confirm the production of pronoun *I* (http://wordbank.stanford.edu/analyses?name=item_trajectories)

Discussion

Third verbal person and name as self-reference mean

The stage of 3rd person sg (without using pronoun *I*) is denoted as pre-pronominal and it is confirmed by researches in other pro-drop languages: in Spanish and Italian (Clark, 1986, p. 687- 782), in Polish (Smoczyńska, 1992, p. 203-228), in Russian (Kiebzak-Mandera, 2008, p. 335), in Bulgarian (Stoyanova, 2009, p. 23). Self-reference researches in non-pro-drop languages pay attention to self-reference and accordance. Huxley (1970, p. 154) observes using the name and the verb in speech of a boy called Douglas (9). „In example (2;3-2;7) the verb does not agree with the third-person form of the subject. It can be construed either as agreeing with the subject on semantic grounds (the subject is the speaker and therefore first person), or as being unmarked, or as echoing a second-person command made to Douglas by someone else. Example 9 (2;7) comes from a period in which Douglas sometimes used *I* alone, sometimes Douglas alone, and sometimes both in combination. When Douglas is used, agreement is sometimes third-person, sometimes first person. In the repetition of sentence frames in example 9 (3;1) the verb form does not change in concord with the subject, Douglas as a speaker used first-person. He adheres to a semantic concept of person, rather than a syntactic one.“ In Slovak, the forms of verbs are clearly differentiated and in child’s speech we notice exclusively syntactic accordance with 3rd person sg. (child about himself: *Janka is eating*, never *Janka am eating*). It means that the preference of semantic accordance before the syntactic one is not a constant feature in speech development. Expression of accordance can be associated with the type of language.

(9)	(2;3-2;7)	Douglas, empty that out.
	(2;7)	I, Douglas picks up big cards on floor.
	(3;1)	I want a sweet, Douglas want a sweet.

We have mentioned that the first usage of own child's name is accompanied by a gesture. It seems that a gesture is not only an individual demonstration in speech development. Lepskaja (1988, p. 52) mentions that, while in the language there were no personal pronouns, the subjectivity was expressed by a gesture – the speaker pointed to own body. The remains of the state can be observed in some languages where expressions with the function of personal pronouns have been created from parts of the body (e.g. in Vietnamese *minh* means, depending on the context, *body* as well as the pronoun *I*).

The origin of name as a self-referential mean was observed in emotional interaction with an adult. Morgenstern & Brigauidot (2005) researching speech development in children speaking French counted on the impact of adults' emotional expressions to the development of personal deixis. The authors presume that children are able to distinguish adults' emotional comments about them (comments about themselves) by which extraordinariness of children is emphasized while the authors count on the influence of positive and negative emotionality (congratulations, reproaches). Emotionality is deemed to be the stimulus for repetition of children's statements containing their name. Similarly, Caët (2012, p. 87) in the study on self-reference development in a child speaking French mentions that despite mother referring to the child by the name and only rarely by 3rd person, it happens just when she speaks about an extraordinary situation associated with the child. The extraordinariness is supported by mother's emphatic intonation. Brigauidot et al. (1994, p. 14) evaluated using the name in self-reference as a condition "for entry into own self". Even the data in our case study documents that after a child "discovers" his name and increases the frequency of its usage, the use of conventional self-reference means intensifies as well (1st person sg and pronoun *I*).

The similarity of research results in Slovak on one side and French/English on the other side can be also found in reciprocal interaction contexts that stimulate the production of self-reference means and means referring to an addressee. Brigauidot et al. (1994, p. 13) mentions that self-reference is formed in interaction containing a reciprocity relation (in French *à moi – à toi, donne – tiens, à Guillaume – à maman*). The research in Slovak but also in English and French show that learning to self-refer requires situations with reciprocal relation between the speaker and the addressee. In other words, the production of „I“ happens in parallel with understanding „you“. I presume that learning

alternate perspective grows beyond the borders of linguistic means and reaches as far as to role alternation and experiencing reciprocity in non-verbal alternations between a child and an adult. In the diagnostic tool *Communication Behaviour Test I* for children aged 8 to 16 months (Kapalková et al., 2010) that is created based on authentic communication between children and parents in Slovak environment, from 32 items focused on testing adult speech understanding a one fourth of commands based on the reciprocal relation of child and adult (*give the teddy, take the teddy, give a kiss, say bye, throw the ball, go to daddy, come to mama, send a kiss, roll [=roll the ball], stroke*) and from 15 gestures almost one half has a reciprocal basis (e.g. a child passes objects to another persons, a child stretches hands out towards an adult so that he could take him in the hands etc.).

Pronoun *I* in speech development

Foreign studies discuss whether learning pronouns using which a child refers to himself and an addressee is associated with sibling relations. It is thought about a so-called sibling effect (sibling effect) according to which the younger child takes more advantage from the speech of older one or, that the only child has less opportunities to monitor alternating perspectives of the speaker and the addressee and, therefore, also words and forms requiring the alternation of perspective are developed more slowly (Deutsch et al., 2001, p. 284-315).

The research of Stojanova in Bulgarian (2009, p. 20) supports this tendency, however, on the other side Smoczyńska (1992, p. 203-228) in the case study in a child speaking Polish growing with an older sibling, observes no profit from the sibling effect. The child under research in our study is the only child in the family at the time of records and despite the period of self-reference by 3rd person and name lasts up to 29th month (Graph 1), the child also continuously uses conventional self-reference means. The start of systematic production of the pronoun *I* is observed in the time when the ability is confirmed by three fourths of parents in the researched sample (24th month, Table 2).

To compare, let's present the development in other languages. Brigaudiot et al. (1994, p. 10) observes the start of using the pronoun *I* in three children learning French and English in the following way: Peter in English since 2;00; Juliette and Guillaume in French since 2;04. Caët (2012, p. 83) observes the grammatical subject in majority of verbs by which the child refers to himself since the age of 2. There are 2 conclusions from the comparison:

- (a) Neither child learning a non-prop-drop language uses a subject pronoun automatically as a part of verbal form. The pronoun is either completely omitted or, instead of a pronoun, they use a pre-verbal sound first (so-called

filler). It occurs in situations when the child experiences a problem and desires attention. Using a subject pronoun depends on the semantics of the verb. Caët (2012, p. 82) observes the absence of subject in verbs *want*, *can*, *know* and *go* for the longest time.

- (b) The fact that the child is an only child in the case study has no negative influence on the production of pronoun *I* (but also other self-reference means).

When analysing *I*-statements, we have defined two groups of functions related to the relational part of communication and pragmatics. Brigaudiot et al. (1994, p. 11) states that children speaking French use self-reference to express affiliation to someone (*moi aussi – me too*) first, in a child speaking English the first statement given is *no me go home too* (ibid., p. 10). At the same time, demonstrations of comparison, contrast, otherness, opposition of a child towards others occur among self-reference means in early speech. The need of affiliation (*me too*) and autonomy (*I versus others*) at the same time are recorded in early speech in Slovak, too. The differences are, naturally, in linguistic expressions: while in Slovak the marker of social position is the combination of *I* + 1st person, in French it is the combination of personal adjectives and personal pronouns and the verb (*moi + verb* or *moi + je + verb*). Similarly, in English Orvig and Morgenstern (2015, p. 164) mention the pronoun *me*, by which children in early age emphasize on the contrast *I versus others*. However, the structure *me + verb* (*me working a railroad*) is not a conventional part of adult speech. The origin of the constructions in child speech is explained by the authors as imitation of question fragment (*Do you want to me write? Me write.*). Regardless the type of language, a personal pronoun acts as a marker of child's social position in interaction with an adult at an early age.

In development of pragmatic functions of *I*- statements Brigaudiot et al. (1994, p. 123-131) mentions the succession: will, intention, opinion, feeling and information on an action actually in progress and later on a past action. Will and intention (Table 1) belong to the group of central functions also in discourses of a child learning Slovak. Other pragmatic functions (opinion, feeling, information) are registered as a part of a wider centre and periphery of pragmatic functions also in the speech of a child speaking Slovak. Primary functions of *I*-statements from the point of reflection of relations between a speaking child and an adult as well as from the point of pragmatics are not dependent on whether the personal pronoun is an obligatory or facultative component of statement.

Conclusion

The development of means using which a child refers to himself at early age is dynamic. First, the child refers to himself as to any other person (3rd verbal person). At the end of early age he is able to use the pronoun *I* also in speaking for another person.

Between the given poles we observe modification of self-reference means and their functions. The third person of the verb first refers to a physical *I* and later the child uses it in a pretended self-reference during a symbolic play. In a two-word statement there is a structure of 3rd person with the child's name. Using his name, the child starts to identify himself as an autonomous individual in the social world, the social *I* comes into existence. The name is the stimulus for the 1st person of the verb, the conventional mean of self-reference in Slovak. Semantics of verbs and pragmatics of statements with 1st person give evidence about the fact that so-called physical actions are alternated by actions with a conscious intention. From implicit self-reference, development heads to explicit self-reference by pronoun *I*. *I*-statements testify about the child's ability to formulate contents of a statement with regard to social distance from a communication partner. Dominant pragmatic functions of *I*-statements (will, intention, refusal and text routine) show the growing autonomy of the child and the need of social closeness, decreasing dependence on the situation context „here and now“, but also the joy in imitation.

Child's self-reference is created in the interaction context that is preferentially provided by the mother and her speech is oriented to the child. The change of self-reference behaviour of the child is reflected in the changes in how the mother refers to herself. This way, she supports child's self-reference development.

The comparison of self-reference development in Slovak with foreign researches results shows numerous identical tendencies in the succession of self-reference means, in pragmatism as well as the relational side of child's communication with an adult (emotionality, reciprocity, social closeness and distance of partners). This proves that self-awareness at an early age is also formed by constants independent on a concrete type of language and cultural environment.

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Preschool attendance of very young children: Parents' choice and outcome satisfaction

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Abstract

This empirical study focused on parents who enrolled their two-year old children in preschools in the Czech Republic. Recent provision of the Ministry of Education recommended that preschools accept children who are as young as two years, in response to increased demands of mothers who want to re-enter the employment after maternity leave. The purpose of the study was to examine the reasons of parents to place their children in preschools as well as their satisfaction of the developmental progress of their children in this institution. A representative sample of parents who enrolled their children in preschool from age two was surveyed (N=520). Surprisingly, caring for the child while at work was not the most important reason. They rated it 3.66 on a five-point scale. Other reasons were rated higher: getting the child accustomed to interaction within groups of same-age children (M=4.01), acquiring cognitive skills and knowledge (M=3.89), and getting accustomed to a routine other than that found at home (M=3.75). When asked to assess the developmental progress of their children due to preschool attendance on a 3-point scale, the parents noted progress in communication ability (M=2.35), social skills (M=2.37) as well as overall progress (M=2.62). Concerning demographic characteristics, the estimate of the child's overall progress in preschool was significantly related to the mother's level of education and her marital status.

Keywords: preschool choice, enrolment, parental satisfaction, child's developmental progress

1 Introduction

In the Czech Republic, preschool attendance is generally offered to children aged three through to five or six years. (Primary school starts at age six or seven.) The service is offered by public, private and church preschool facilities. Preschools are whole-day institutions, though parents can place children on a part-time basis, especially in the first few months of attendance.

Preschool approach integrates care and education and emphasises children's learning through play, exploration, and experimentation. The activities range from teacher structured to non-structured, the former one usually prevailing. The recent provision of the Ministry of Education recommended that preschools also accept children who are as young as two years. This provision came in response to increased demands of mothers who want to re-enter the workforce after their maternity leave. Parents had an option to place children in preschool at age two in the past also, but the growing number of mothers, who return to their workplace, has changed the education and care demands over the last few years. There has been a growth in the number of two years old children in preschools in recent years. In the 2014/2015 school year, there were 43 321 two years old children (or 9.1 % of all children) in preschools, while in 2015/2016 there was an increase to 11.5 % of all children (MŠMT, 2016). It is assumed that this trend will continue at least for next several years (in the Czech Republic, parents can place two years old children in nurseries or child centres, which provide care rather than both care and education, as preschools do. While preschools are supervised by the Ministry of Education, pre-preschool facilities are regulated by the Ministry of Labour, Social Affairs and Family.)

The demand of families affected the preschool policy of the Ministry of Education and it issued provisions to preschool facilities as regards acceptance of two years old children. The ministry also published recommendations about appropriate teachers' practices with two-year old children and requirements, such as child safety, hygiene, provision of food and personnel qualifications that preschools must meet to ensure high-quality service for two years old children (MŠMT, 2017).

Preschool attendance in the early years of life has both professional advocates and opponents. However, the recent investigation of the EPPE (Effective Provision of Preschool Education) project documented the early start of preschool attendance is related to better intellectual development and improved independence, concentration and sociability. Children with limited preschool attendance have poorer cognitive attainment, sociability and concentration when they entered primary school (Sylva et al, 2003). Many years of research document the positive effect of high-quality early care and education on children's success in school and beyond, especially in language skills (Shonkoff & Phillips, 2000; Harris et al., 2007; Norens & Barnett, 2010; Yoshikawa et al. 2013). However, early enrolment in preschools brings many questions that are the focus of professional disputes both abroad and in the Czech Republic (Belsky et al., 2007; Barnett, 2011; Hašková, Saxonberg, & Mudrák, 2012). More studies are needed to clarify not only the efficient provision of early education and care but

also the expectation of parents who enrol their children in the preschool facility. This is linked to a question: What were the parent's reasons to enrol their children in preschool as early as at age two and how did they perceive the impact of this facility on their child's ability and skill development? Of course, a parents' decision depends on early care and education options in their community and family, preschool affordability and cost. Some preschools have waiting lists for enrolment, some parents choose family members to take care of the child (typically, grandparents). Enrolment of a child in preschool at age two is an essential act of the parents with important consequences to the child's development. Parents must judge their decision carefully, decide between pros and cons of their decisions and consider a number of aspects, some of them beyond the sphere of the quality of preschool services. These might be the cost of attendance, the distance of the facility, or operating hours.

2 Problem statement

In this study, we concentrated on two demographic characteristics, i.e., the parents' level of education and marital status, that we consider essential to understand the parents' decision to enrol their child in preschool at the age of two. In addition, we examined the parents' satisfaction with the developmental progress of their children in preschool and inspected how this satisfaction is associated with the parents' level of education and marital status.

3 Research Questions

The study sought answers to three questions:

1. What are the parents' reasons to enrol their children in preschool as early as at age two?
2. How are the parents satisfied with children's developmental progress as caused by preschool attendance?
3. What were the parents' reasons to enrol their children in preschool and their satisfaction with its impact as associated with two demographic characteristics, parents' level of education and marital status?

4 Purpose of the Study

The study concentrates on reasons of parents of 2-years old children to enrol their children to preschool and on their satisfaction with children's progress in this facility.

5 Research Methods

5.1 The Sample

The data of the study originated from the representative sample of Czech families who enrolled their child in a preschool facility at the age two (N = 520). The respondents were mothers (79.7 %) or fathers (20.4 %). The largest age group were from 31 to 40 years, followed by 21 to 30 years. The majority of respondents in the sample live with a husband/wife (42.3 %), followed by living with a partner (40.8 %), or living alone (16.9 %). The majority of respondents have one child (50.2 %) or two children (37.3 %). Most of the respondents completed upper secondary education of ISCED 344 (46.5 %), followed by university education (34.8 %), and followed by upper secondary education of ISCED 352-353 (15.2 %). See Table 1 for complete description of the sample.

Tab. 1: The structure of the sample

Characteristics	Categories	%
Respondent's gender	Female	79.6
	Male	20.4
Respondent's age	≤ 20	6.0
	21-30	36.9
	31-40	38.3
	≥41	18.8
Number of children	1	50.2
	2	37.3
	3	10.4
	4	1.9
	5	0.2
Respondent's education	Primary - ISCED 1	3.5
	Upper secondary - ISCED 352-353	15.2
	upper secondary - ISCED 344	46.5
	University -ISCED 6-8	34.8
Partner's education	Primary ISCED 1	3.8
	Upper secondary - ISCED 352-353	11.9
	Upper secondary - ISCED 344	41.5
	University - ISCED 6-8	29.8
Respondent's marital status	Married	42.3
	Lives with a partner	40.8
	Single	16.9

5.2 Data collection

The data were collected through individual structured interviews with one of the children's parents. The interview took place either in a preschool facility or at parents' home. The respondents' privacy was protected by assigning numbers to interview protocols. An interview scheme was established as based on the authors' experiences in early childhood care and education, previous research as well as on the analyses of the relevant literature.

The interview concentrated on questions about the reasons of a preschool choice for the respondents' children from age two as well as on their satisfaction with the particular preschool attended by the child. Altogether, seven reasons of preschool choice were offered to be rated, which had been previously identified as relevant in the Czech context: taking care of the child while the parent is at work, enabling interaction with peers, making new friends, to be with other adults (teachers, teacher aides, cook etc.), expanding knowledge and skills, learning new routines and because the parent was unable to deal with the child. An example of item: *My child attends preschool so that she becomes accustomed to interaction with same-age children* (1 strongly disagree – 5 strongly agree). Additional items were open-ended questions and offered to present other reasons of choice than those presented by the authors.

The respondents rated their satisfaction of the child's developmental progress due to preschool attendance in three large areas: communication ability (vocabulary extension, speech fluency, sentence complexity), social skills (inclination to play with peers, courage to address other children), and overall developmental progress. An example of an item: *I consider the developmental progress of my child in communication skills to be:* (1 weak – 3 excellent).

Demographics included the respondents' gender, age, marital status, number of children, and education level of both the respondent and the respondent's spouse/partner.

6 Findings

The findings will be organised according the research questions. First, the descriptive data on parents' reasons of enrolling their children in preschools will be presented, followed by their satisfaction with the preschool's impact on the child. Both the reasons and the satisfaction will be associated with the mothers' marital status and level of education.

6.1 Parents' reasons to enrol the child in preschool

The parents' ratings of the reasons to enrol the child in preschool at the age of two were averaged and the means were ordered from the highest to the lowest.

Table 2 shows the details. Three findings are noteworthy. Surprisingly, care of the child during mothers' work time was not the highest preference of the parents. Parents also have other motives for their decision and that the employment reason and career building was not the highest preference. This finding somewhat disrupts the generally publicised opinion in the Czech press that the sole reason of preschool attendance of the child at age two is due to re-employment of their mothers. Nevertheless, the employment factor is present and is strong ($M = 3.66$ on a five-point scale).

The second important finding is that there is very little difference between averages in the six highest rated reasons. In fact, the distance between the highest and the lowest rated reason is less than half a point on the five-point scale. This is a tiny difference and it indicates that the parental motives are more or less equally important. The parents value the broad education and care aims of preschools, encompassing social, communicational, and cognitive learning of children. Third, the mean scores on these six reasons are very high, ranging from 3.58 to 4.01. This might document that the parents' expectations are well thought out and are not a result of a sudden impulsive decision.

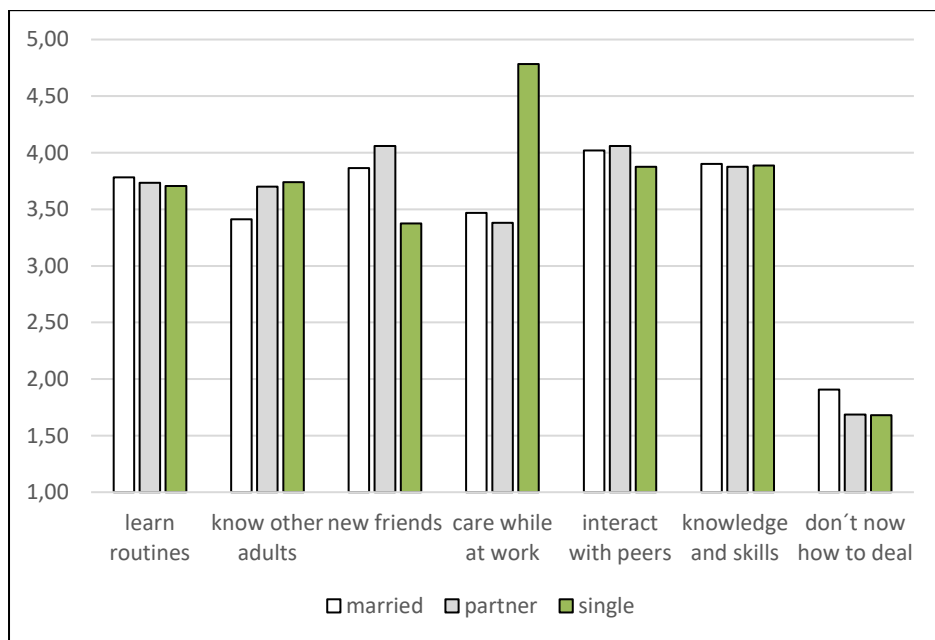
The least scored item was related to a situation that parents were unable to deal with children's behaviour and therefore they placed them in preschool ($M = 1.78$). These were either parents who had a child with "problematic" behaviour, or parents who have insufficient time to take care of the child properly because they had another child or children or had a demanding job. Inspection of demographic data revealed that these were married couples rather than single mothers, and mothers with primary education only.

Tab. 2: Parents ratings on reasons to enrol their child in preschool at age two

The reasons why my child attends preschool is:	N	Min.	Max.	Mean	SD
to learn interaction with same-age children	500	1.00	5.00	4.01	1.20
to acquire knowledge and skills needed for higher classes of preschool	500	1.00	5.00	3.89	1.38
to make new friends	500	1.00	5.00	3.86	1.25
to learn routines other than those found at home	500	1.00	5.00	3.75	1.28
to be cared for while I am at work	500	1.00	5.00	3.66	1.61
to get accustomed to other adults	500	1.00	5.00	3.58	1.39
the child is problematic and we don't know how to deal with her	500	1.00	5.00	1.78	1.34

Parents are not a homogenous group in regard to demographic variables and their decisions concerning a child's enrolment in preschool is associated with a number of social and economic characteristics (Peyton et al., 2001; Fantuzzo, Perry, & Childs, 2006; Rose & Elicker, 2008). We examined two of them, which we considered essential in the Czech context, i.e., marital status of the mother and the mother's level of education.

Fig. 1: Rating of reasons to enrol two-years old children in preschool by mothers' marital status



The mother's marital status was categorised as (a) married, (b) living with a partner, or (c) single. Figure 01 shows small differences among the three marital statuses across the seven reasons categories except two of them. In *Making new friends* there is a significant difference between the three groups ($H(2) = 15.880$, $p = 0.000$) with a single group of mothers scoring the lowest ($M = 3.37$) and the partners' group scoring the highest ($M=4.06$). In *Care while at work* there was also a significant difference between the three groups ($H(2) = 61.392$, $p = 0.000$) with the single group scoring the highest ($M = 4.78$) and the partners'

group scoring the lowest ($M = 3.38$). While the latter result is obvious, because single mothers have a high priority to preserve their job to ensure living for them and the child, the former result is difficult to explain. Perhaps, single mothers cling to their children very much and want to limit the social environment of the child in order to "reserve" the child for themselves. It should be noticed that single mothers scored low also on another social reason of the child's enrolment in preschool, the child's interaction with peers.

The mother's education showed strong differences in three reasons of the child's enrolment in preschool at the age of two. See Tab. 3 for details. A mother's education is strongly associated with *Care while at work* ($H(3) = 12.247$, $p = 0.010$), with the primary education scoring the highest ($M = 4.44$). This is not a surprise because lowly educated mothers tend to have the most difficult situation to preserve a job. Further more, the mother's education is strongly associated with *Find new friends* ($H(3) = 11.837$, $p = 0.008$), again with the primary education scoring the highest ($M = 4.22$). Finally, the mother's education is strongly associated with *Learning new routines* ($H(3) = 19.998$, $p = 0.000$), with upper secondary education of ISCED 352-353 scoring the highest ($M = 4.22$), and with Interaction with peers ($H(3) = 7.938$, $p = 0.047$), with university education scoring the highest ($M = 4.13$).

Tab. 3: Reasons to enrol two-year old children in preschool by education of mothers

Mother's education	Learn routines	Know other adults	New friends	Care while at work	Interact with peers	Knowledge and skills	Don't know how to deal
Primary	3.22	3.33	4.22	4.44	3.17	4.06	2.78
Upper secondary ISCED 352-353	4.22	3.66	3.42	3.27	4.04	3.85	1.89
Upper secondary ISCED 344	3.72	3.53	3.99	3.58	3.97	3.80	1.76
University	3.65	3.66	3.82	3.86	4.13	4.01	1.65
Sign.	0.000	0.428	0.008	0.010	0.047	0.110	0.059

Sign. = Kruskal Wallis test

6.2 Parents satisfaction with the child's developmental progress in preschool

The parents' decision about the enrolment of the child in preschool at the age of two is one perspective, the developmental efficiency of the preschool is another one. If parents' satisfaction with preschool developmental effect was weak, their decision would prove wrong. Parents were asked to rate how they perceive enhancement of the child on a 3-point scales in three domains, i.e. in communication skills, social skills, and overall progress. Table 4 shows the findings. The parents rated high enhancement of their children in communication skills ($M=2.35$). They perceive that preschool environment promoted the children's vocabulary extension, speech fluency as well as sentence complexity. All these skills are crucial for dealing with peers and adults, as well as for learning. Parents also rated high social skills improvement ($M = 2.37$). Children increased frequency of playing with peers and were not hesitant to address other children or adults. These skills are functional for life and for contact with a variety of people. This finding indicates that parents consider preschool to be an important source of social experience for the child. Parents rated the overall improvement of the child ($M = 2.62$) highest. This broad category encompasses social, cognitive, linguistic and also emotional development of the child.

However, in interpreting the parents' satisfaction with the child's progress one must take into consideration that their ratings of children's progress could be biased by their own decision to enrol their children in a preschool facility. Their satisfaction with the child progress in preschool reinforces their decision to enrol the child in this facility. The correlation between overall satisfaction and three reasons to choose preschool for the child was statistically significant, i.e., *Learning routines* (0.100*), *Making new friends* (0.145**) and *Learning knowledge and skills* (0.179*). Though the correlations are not high, they indicate associations between parents' satisfaction and perceived progress of children in these three domains.

The parent's satisfaction with the child's developmental progress due to preschool attendance is based on a subjective judgement. It is generally accepted that professional and parental definitions of quality differ. Professional assessment is objective while parents' rating is less exact because it may be contaminated with the parents' emotions to their child. Professionals rate other children while parents rate children of their own. Professionals use pre-defined discrete assessment indicators while parents look at children's progress holistically.

In spite of the assessment differences between professionals and parents, the judgement of the latter cannot be rejected as invalid. The parents' opinion is

important for their own satisfaction. If they are satisfied with the child's developmental progress, they are also satisfied with their own decision to enter the child into institutional education and care.

Parents' satisfaction was examined in relationship with two mothers' demographic characteristics. Satisfaction with the child's overall progress was significantly associated with the mothers' education ($H(3)=15.657, p = 0.001$).

Tab. 4: Child's developmental progress due to preschool attendance as perceived by parents

I noticed my child's progress in:	N	Min.	Max.	Mean	SD
Communication skills	488	1.00	3.00	2.35	0.65
Social skills	500	1.00	3.00	2.37	0.63
Overall progress	496	1.00	3.00	2.62	0.57

Mothers with upper secondary education of ISCED 352-353 ranked the satisfaction the highest ($M = 2.73$), while primary educated mothers ranked the lowest ($M = 2.28$). Satisfaction with the child's overall progress was also significantly associated with mothers' marital status ($H(2) = 38.301, p = 0.000$). Married mothers ranked the satisfaction the highest ($M = 2.75$) while single mothers the lowest ($M = 2.30$). Poor results are consistent with similar studies abroad. Mothers education and marital status are demographic characteristics the importance of which in the parents' preschool choice has been proved in countries as diverse as Taiwan (Jang, Moore, & Lin, 2014), Italy (Scopelliti & Musati, 2013) or the United states (Fantuzzo, Perry, & Childs, 2006).

7 Conclusion

This study focused on parents who enrolled their two years old children in preschools in the Czech Republic. The purpose of the study was to examine the reasons of parents to place their children in preschools as well as the satisfaction of the developmental progress of their children in this institution. A representative sample of parents who enrolled their children in preschool from age two was surveyed ($N=520$) using individual interviews. The most important finding is that caring for the child while parents are at work was not the most important reason. They rated it 3.66 on a five-point scale. Other reasons were rated higher: getting the child accustomed to interaction within groups of same-age children, acquiring cognitive skills and knowledge, and getting accustomed to a routine other than that found at home.

Generally, the results showed parents' were satisfied with their child's developmental progress in preschool due to the impact of the preschool program. These results are consistent with other findings (e.g., Teleki & Buck-Gomez, 2002). When asked to assess the developmental progress of their children due to preschool attendance, the parents noted progress in communication ability, social skills as well as overall progress. As for concerns regarding demographic characteristics, the child's overall progress in preschool was significantly related to the mother's level of education and her marital status.

Though mothers' satisfaction was positively related to the impact of preschool, we do not know very much about the sources of this satisfaction. We need to examine what knowledge they have of the preschool programme and teachers' practices. More research is needed to ascertain how parents view the teachers' activities, their approach to children and the overall physical and emotional climate of preschool. This suggests a route of future research in Czech preschools.

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Effects of Using Musical Fairy Tales in the Classroom: Action Research in Poland

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Abstract

The paper concentrates on the problem of developing imagination understood as human trait and virtue. To realize the challenge educators have to face huge difficulties as a tendency to flatter the world and its inhabitants dominates and becomes more and more powerful. A musical fairy tale is presented as a valuable and effective school practice. From one side it refers to perennial human custom of listening, telling, and creating stories, fables, and sagas. They may base on real life or refer to imaginary situations. Thus creation may have various realizations, depending on personal knowledge, skills, life experience, cognitive horizon, individual interests and virtues. From the other side the idea of the fairy tale shown in the paper refers to the music and its uncountable possibilities of describing the world. Everything depends only on one's imagination. The last part of the paper presents the effects of students' work on musical fairy tales. Those students apart of being instrumentalists and vocalists of the Music Academy of Lodz, Poland plan to become music teachers in compulsory general education.

Key words: flattering world, visual culture, *homo videns*, imagination, human values, EU Key Competencies for Lifelong Learning, Polish compulsory school curriculum, creation of musical fairy tale, music literacy

Introduction

The idea of the paper has emerged as a consequence of my concern about the total lack or insufficient presence of imagination as an indispensable category in development of young generations. I perceive imagination as one of the most profound values that should be taken into consideration and constantly worked on throughout the long process of compulsory education. Imagination enables to preserve and develop aspects of one's identity and uniqueness. Thus, it helps each individual to cope with contemporary challenges and everyday tasks in a creative, interesting, and responsible way.

The main question I pose concerns the ways of introducing into educational practice human values and attitudes corresponding to them. How to create human imagination, how to realize and fulfil humanistic education, and how to enable students to develop their personality while encountering a dominating, global, and mass culture, with predictable, neo-behavioural pattern of acting, responding, and reacting? (Friesen, 2018)

Apart from “tough” values like democracy, security, dignity and human rights, equality, justice, freedom, identity, and common goods which are usually recalled when speaking about commonly understood universal values (Johnson, 2011; Rogalska-Marasińska, 2015), I refer to some “soft” ones. Those are the values which ease each individual to become “more human”, though, or maybe that’s why, they are hard to measure or estimate. “Tough” values can be “translated” into desired attitudes which influence the character of rules, rights, and obligations in particular society (*Treaty of European Union*, 2012; *Charter of Fundamental Rights of The European Union*, 2012). For instance, business honesty can be easily verified and judged thanks to written law and tax legislation. On the contrary, “soft” values are much more vulnerable and personal, so they may easily vanish in the chase for educating a man to become capable to succeed in his profession.

The process of educating towards “soft” values is a very difficult not only because there are no clear evaluation guiding principles or framework for assessment, but there is little expectation in school curriculums as well. In my opinion such situation is extremely worrying and should be considered in the relation to dangers caused by processes of world’s and people’s unification. Some most significant symptoms of that transition are: a “flattering” world, domination of visual culture, and creation of *homo videns*.

1 Dangerously unifying world versus shaping and developing child’s imagination

A flattering world by Thomas L. Friedman. In the book *The World is Flat: A Brief History of the Twenty-first Century* (2005/2007) T.L. Friedman, an American journalist and writer, presents his undoubtful support and even fascination towards the global process of world’s and its inhabitants’ transition from contemporary state of life into a totally identical form of existence. Friedman as an apologist of such one-way change expresses his point of view that in face of global market all of the historical and geographical divisions should vanish, or better – should be intentionally removed. He is happy that the unification of social life (international business, transnational corporations, new technologies, obligatory ways of communications, and predictable interpersonal

behaviours/reactions) leads to flatter the world. He is convinced that such fundamental social change can only be compared with some spectacular historical movements, like formation of national states, invention of printing, or birth and domination of industrial Revolution. He also explains that “there is something about the flattering of the world that is going to be qualitatively different from the great changes of previous eras: the speed and breadth with which it is taking hold” (Friedman, p. 49). Such shift can be succeeded thanks to forces responsible for all fundamental, total, and final transformations. Friedman calls them “flatteners” and specifies ten of them (p. 51–199):

1) 9th of November 1989 (11/9/89) – *A New Epoch of Creativity: When the Walls Came Down, and the Windows Went Up* – the communism fell down (symbol of division – the Berlin Wall – collapsed) and the impact of Windows-powered computers took place. That moment is understood as an opening time for various forms of westernization able to flow into new post-soviet territories;

2) 9th of August 1995 (8/9/95) – *The New Age of Connectivity: When the Web Went Around and Netscape Went Public* – a new epoch of the development of the web began, Netscape and Web broadened the audience and entered the market at price of \$28. Thus the common digitalization took place becoming accessible to all people round the world;

3) *Work Flow Software* – understood as a standardization of work and presence of technologies that allowed work to be easily exchanged between institutions and private people across the world. Websites, html protocols, e-mailing, tele-conferences, software programs became every-day reality.

Friedman believes that those first three forces/flatteners has constituted a crude foundation of a whole new global platform of collaboration. He expresses opinion in the statement: “as more and more of us learn how collaborate in theses new and different ways, we are steadily flattering the world even more” (p. 93).

There are next „flatteners” which participate in the process:

4) Uploading – (contrary to “downloading”) individuals and communities use the open source software and create blogs or Wikipedia; various people participate in creating the web space – their intentions are tied to various backgrounds so this “flattener” may be the most disruptive force of all as information put on web may come from unknown sources;

5) Outsourcing – being afraid of a Y2K bug, IT companies split service and manufacturing activities using World Wide Web and fibre-optic cables; with the beginning of a new millennium strong cooperation between USA and India has been launched – a new Silicon Valley in Bangalore, India (with 9 million of inhabitants) appeared on the map of advanced technologies;

6) Offshoring – means to relocate a company's activity to a foreign land, especially to China; the tendency became clear after China's entrance into World Trade Organization in 2001;

7) Supply-chaining – usage of the supply chain to most effective company's activity (in terms of sales, distribution, and shipping);

8) Insourcing – one company's employees offer services for another company, different than its main specialization, e.g. UPS (United Parcel Service) or FedEx workers beyond transport services, realize the whole logistics (even with financial service or computer repairs);

9) In-forming – the growth of search engines (like Google, Wikipedia) make a tremendous growth of users, who have the ability to find various information about things and other people;

10) „The Steroids” – personal, mobile, and digital devices (mobile phones, iPods, personal assistants) are easily used by anyone, any time, and everywhere.

Paradoxically, glorifying such technocratic and unhuman world, Friedman uses concepts and notions from an opposite – human system and philosophy of life. He not only explores personal, „subjective” language, but precisely refers to its essential terms and expressions. Imagination is one of them. Friedman in a cunning and quasi-objective way makes an illusion that interpretation of imagination which he represents is the commonly obligatory one.

Friedman explains that there are two ways of flattering the world, both using imagination as a leverage of success: “one is to use imagination to bring everyone up to the same level, and the other is to use your imagination to bring everyone down to the same level” (p. 613). Friedman also stresses a serious connection between people's ability to imagine various things and situations, and their actual quality of life in the future. He convinces: “You can flourish in this flat world, but it does take the right imagination and the right motivation (p. 635). To do this you should create: “the generation of strategic optimists, the generation with more dreams than memories, that generation that wakes up each morning and not only imagines that things can be better but also acts on that imagination every day” (p. 635). Undoubtedly according to such declaration an attentive reader should ask himself: What kind of imagination has the author of those words in mind? What does it mean “a suitable imagination”? What is the “proper” interpretation of that expression? Why something so unique like individual imagination should be cut off of one's personal past, biography, roots, and identity? Why the only “profitable” imagination is the one which has the practical implementation? And how can you treat yourself a “strategic optimist” without dreaming about a better life, while best projects, plans, and realizations always

include elements of dreams, fantasy, or unconventional prime idea? Imagination cannot be so predictable and instrumental.

Domination of visual culture. Struggling for a vast identity of imagination Andrzej Mencwel, a Polish historian, critic of Polish literature and culture, and a cultural anthropologist, speaks about anthropological imagination (Mencwel, 2006). After another Polish linguist, Mieczysław Porębski (Porębski, 1972), Mencwel distinguishes *iconosphere* (understood as the fine-art dimension of images, drawings, pictures, paintings, orthodox or mass culture icons, graphic signs, visual signs, symbols, emoticons, etc.) and *logosphere* (the dimension of language, words, spoken or written expressions, proverbs, etc.).

The relation between both spheres is not so obvious or easy. *Logosphere* has been using words: spoken – for tens of thousands of years till now, written – several thousand years, and printed – “only” for several hundred years till now. *Iconosphere* has a comparable long history of its existence. We find its traces in petroglyphs/cave paintings of Lascaux – dating before 17 thousand years ago, of Aurea Nota, Cantabria, Italy – before 20 thousand years ago, of Altamira – before 22 thousand years ago, or of lately uncovered Indonesian Maros, on Sulawesi Island (former Celebes Island) – dating even about 40 thousand years ago! Though both areas of human activity are tremendous and impressive, today a huge expansion of *iconosphere* takes place, while *logosphere* is in serious retreat. That, as Mencwel explains, is an effect of dominance of contemporary technoculture which means „the conquer of a new order of visibility” (p. 382).

Iconosphere acts and attacks publicly, in a massed transmission, using all kinds of global media – virtual, digital, and analogue ones – as its weapons. So *iconosphere* is brutally marching into every private life, imposing its cosmopolitan patterns and standards – „formats” on each human being. People like objects, computers, or other gadgets are to be intentionally “formatted”. There is no place for their individual, subjective shaping, developing, and education. The same visual images, odd and/or shallow behaviours, expected reactions, and anticipated ways of expressing emotions (e.g. loud and noisy laugh drawing others’ desired attention) are presented as normal and proper ways of interaction. Each day such patterns are served to billions of people round the world.

At the same time self-representations which are traditionally and culturally rooted are evaluated as old, needless, and unwelcome. Thus groups or societies of clear identity and cultural awareness are forced to undergo the process of atomization, what Mencwel calls „singularization”. In front of such „singularization”, a man becomes vulnerable while a „massive propaganda machinery” triumphs. In such circumstances imagination is to be limited to

automatic associations, e.g. each psychological idea is to be automatically connected with erotic representation, a car (an object to move, to change places) should be clearly linked with comfortable life, while a summer trip offered by a travel agency – with a paradise freedom of sexual encounters (p. 383).

Creation of *homo videns* by Giovanni Sartori. G. Sartori (1924–2017), an Italian political scientist was another humanist author who expressed his concern about the conditions, stages, and character of world's unification. In his book Sartori explains how a man from *homo sapiens* becomes *homo videns* (Sartori, 2000). Sartori had traced the evidences of such anthropological change, and pointed out some milestones of that anticultural shift. First of all he outlined a general background of typical relation between a man and culture: a) a man is being created by a specific type of culture; b) each culture has its unique “configuration”, generally consisting of two elements: sociological aspect (type of interpersonal contacts) and psychological aspect (ways of using senses, emotions, and mind); c) each culture stays in some relation with media; the change of media equipment influences the change of culture, thus media modifications are at the same time anthropological ones.

Sartori also explains the contemporary process of man's transformation (Sartori, 2007). He introduces a term *homo videns* which is not only a new name but a new phenomenon embracing philosophy of life, expectations towards that new man, and projects of his actual existence. Sartori understands the transition as a change of ways of human thinking influenced by contemporary media messages, cult of image, and tendency to evaluate everyone in the reference of their external elements of visible value, like appearance (behaviour) and wealth or state of possession (type of clothes, brand of a car, breed of dog). Sartori underlines the systematic loss of ability to use abstract concepts and ideas, that can be seen in the tendency to trivialize someone's reflectiveness, type of messages, and ways of thinking. Contemporary *homo videns* has smaller language competencies in comparison to his *homo sapiens* ancestor and does not have the competencies to create symbols. The fundamental thesis of Sartori's deliberations implies that: “a man who loses his ability of abstract thinking is *eo ipso* unable to rationality; he becomes a symbolic animal which cannot any longer sustain nor animate the world being previously created by *homo sapiens* species” (Sartori, 2007, p. 86). Thus former *homo sapiens* becomes *homo videns*.

The threat of dangerous for humanistic existence unification of our life displayed above in three scenes presents an unoptimistic vision of a flat world inhabited by unhappy, narrow-minded, and vain people, who can only be interesting for economical and socio-political manipulators. If in spite of such

tendency educators are still convicted to undertake the efforts towards human development of their students they should look for fast and accurate practical and theoretical solutions. With no doubts one of them refers to imagination. Imagination as an entire human trait deserves to undergo the reconstruction process.

2 Theoretical foundations of humanistic education.

Imagination – different interpretations of the category. If we refer to our personal knowledge, life situations, and experiences (Polanyi, 1958; Kochanowska, 2018) we may distinguish a two-area matrix referring to the question of imagination. One – which in various ranges or different extents displays relationship between imagination and its practical utilization, and the second one – which concentrates on something that is ephemeral, subtle, and delicate, linked to impressions and feelings, which can be later transferred into practice or may constitute an inspiration to next issues.

In other words the first type of imagination presents the ability: to predict or anticipate various situations and challenges, to supplement present issues or evoke new solutions. It serves the practical acting, helps to calculate, to estimate cost-effectiveness, and speak about profits. It enables the rational activity. Typical terms used to describe that version of imagination are: complementation of reality, anticipation, and development.

In that option imagination can also be understood as the ability to present oneself, according to one's will, situations, challenges, other people expectations, etc. Thus it can be connected with the issue of individual competences (process of assuming, of imagining, of building pre-assumptions, or of referring to stereotypes). Imagination can help people to see the world what it exactly is. It may also be a part of a process of hyperbolization of dangers, or – on the contrary – of safety and happiness.

In turn, the second type of imagination gets closer to fantasy or creation of artistic visions. There are many matching wordings to that interpretation of imagination, like creation, bravery, neglecting the templates or repeated patterns, seeking and gaining unconventional solutions, reaching new qualities (making discoveries, presenting freedom of ideas in the field of music, fine arts, visual arts, literature), and being creative – being allowed to divergence thinking, to invent, to figure something out, to fabricate, tell fables, and dream.

Imagination – nevertheless of its type – is always the unique ability of human mind, so it has been constantly staying the subject of interest of various scientific disciplines, like psychology, philosophy, sociology (Prüfer, 2013), arts (we speak about artistic imagination then), and pedagogy (Górniewicz, 2001).

In my first approach, interpretation of imagination proves that imagination is an extremely useful human disposition, and may serve a man equally to his knowledge. There are many authors who represent such option:

- August Comte (1798–1857), a French sociologist, linked imagination with observation, as for him it was the best way to make the research process most objective. Imagination detached from observed facts and devoid of empirical view and investigation would only be a fantasy or even an unreasonable entertainment. That would be a pure act of „inventing” non-existent forms of reality, in other words – forms inadequate to real/true world (Comte, 1961).
- Ferdinand Tönnies (1855–1936), a German sociologist and philosopher, paid attention to the importance of imagination in those situations, when it is hard or difficult to make clear decisions. A man has to overcome an internal resistance and make up his mind towards a decision different from the null – he has to choose affirmation or denial. Thus, imagination combined with motivation to act influences one’s reactions (one undertakes the challenge or runs away). In such a case the final decision is a result of previous individual knowledge, skills, and experiences (a classical example of such a choice is the reaction to a lion encountered at large or in a zoo) (Tönnies, 2008).
- Alfred Schütz (1899–1959), an Austrian philosopher and social phenomenologist, understood imagination as an **instrument stimulating praxis of each individual**. Future episodes of life are predictable (at least to some extent) as they are “constructed” (anticipated) thanks to previous existential experiences (Schütz, 2012).

The apologists of the second approach are other prominent authors, like

- Horace (65–8 BC), the leading Roman lyric poet, divided imagination – representations of imagination into *aegri somnia* (dreams of a man who suffers great fever/is in a high state of delirium) and *vanae species* (fantastic, unreal creatures, somehow mixed in forms and with exchanged elements). *Eagri somnia* refer to nightmares, absurd forms, escaping from human’s will while *vanae species* are understood as images created consciously. The latter represent a kind of deliberate, logic order, thus they can be subordinated to individual’s persuasion (Głutkowska, 2011; Rudd, 1989).
- Jacob Bruno Bronowski (1908–1974), a Polish/Jewish-born British mathematician, historian of science, theatre author, poet and inventor spoke about cultural evolution of a man and his environment thanks to his remarkable gift – imagination (Bronowski 1978; 1984). That unique and brilliant attribute gives him the chance to fly over everyday life, see it from other perspective, and then change and develop it in a profound way. The

ability to imagine various alternatives and to make choices characterise human "free will", so "the main problem of human consciousness is the ability to imagine" (Bronowski, 1978, p.18). We read: "His [man's] imagination, his reason, his emotional subtlety and toughness, make it possible for him not to accept the environment, but to change it. And that series of inventions, by which man from age to age has remade his environment, is a different kind of evolution – not biological, but cultural evolution. I call that brilliant sequence of cultural peaks *The Ascent of Man*. I use the word ascent with a precise meaning. Man is distinguished from other animals by his imaginative gifts. He makes plans, inventions, new discoveries, by putting different talents together; and his discoveries become more subtle and penetrating, as he learns to combine his talents in more complex and intimate ways. So the great discoveries of different ages and different cultures, in technique, in science, in the arts, express in their progression a richer and more intricate conjunction of human faculties, an ascending trellis of his gifts" (Bronowski, 1973, p. 19–20).

- Jerzy Szacki (1929–2016), one of the most important Polish sociologists, perceived imagination in the context of utopias. He distinguished two types of them: *escapist utopias* (dreams about a better life entailing a constant must to escape from difficult reality) and *heroic utopias* – building imaginary visions referring to ideas, standards, and patterns of activities to change the world and make it better (Szacki, 1980).
- Paolo Legrenzi, a contemporary Italian psychologist explains that people live in two parallel worlds or dimensions: a real one and an alternative – fantastical one. Imagination stays in contrary to reality, but at the same time it may remarkably influence our everyday existence. Thanks to imagination a man can discover his imaginary, mysterious world, which can improve the life in a real one. For Legrenzi imagination is a typical human ability, so it should be cared of and responsibly developed, also throughout educational processes (Legrenzi, 2010).
- Maurizio Ferraris, another current Italian philosopher "travels" through ages from antient to contemporary times analysing the presence and character of imagination in each epoch. Presented "products" of imagination show alternative worlds or environments optional to reality (Ferraris, 1996).

Taking into account above considerations I assume that imagination fulfils cognitive and creative functions (sometimes also the compensatory one), especially when a man creates an ideal, colourful, and sustainable world in his mind. Sometimes such unreal, virtual world may become more attractive and

more desirable than the real one. The state may entail various consequences. On the other hand dreaming about better life, it may also encourage an individual or a group/society to positive activities. In other words imagination can become a force that may be used in positive or negative manner. It may be helpful and ease a man to be more opened to social environment. It may enable to build proper interpersonal relations, or it may totally disturb it. Imagination may be the enemy of courage, or the proof of individual wisdom and prudence.

Thanks to imagination people can build interpersonal relations, as they can create images of each other corresponding to the context and environments of their living. Context becomes the most important background in which a person visualizes himself and other people. Doubt or ignorance about the context (cultural, social, educational, historical, political, etc.) is a source of personal weakness, obedience, or feeling the state of insecurity and danger.

If we want to avoid educational mistakes and do not develop negative individual and social attitudes among students, we have to work on creating the educational environment built on strong, though parallelly "soft" – human fundamentals. Imagination of course is one of that issues. So it should be included in various levels of education, and treated as an indispensable element of teacher-student work. The broad analysis of that challenge points out that imagination must be present when the problem of competencies is taken under consideration.

EU Key Competencies for Lifelong Learning (2018). Over ten years earlier (2006) the first set of European competencies was announced. More than a decade some modifications were done. Now we are obliged to undertake and include them in our school/university work. The Reference Framework sets out eight key competences:

1. Literacy competence;
2. Multilingual competence;
3. Mathematical competence and competence in science, technology and engineering;
4. Digital competence;
5. Personal, social and learning to learn competence;
6. Citizenship competence;
7. Entrepreneurship competence;
8. Cultural awareness and expression competence (Council Recommendation on Key Competences for Lifelong Learning, 2018).

The new key competences are all considered equally important, as each of them contributes to a successful life in society. Competences can be applied in

many different contexts and in a variety of combinations. They should be treated as a holistic system in which aspects essential to one domain will support another competence. Authors of the document encounter some skills (like critical thinking, problem solving, team work, communication and negotiation skills, analytical skills, creativity, and intercultural skills) which – according to their intentions – are core elements of each competence, thus they should be “deciphered”, perceived, and consequently realized.

Following this line of thinking I have decided to go through all of the eight competences and search for references to imagination. Taking under consideration the type and theme of my students’ work (musical fairy tale creation) I hoped to find some clear connections with imagination mainly in “literacy competence” and “cultural awareness and expression competence”. To my huge surprise I found it only in the “entrepreneurship competence”.

The description of “literacy competence” displays assumptions as follows: “Literacy is the ability to identify, understand, express, create, and interpret concepts, feelings, facts and opinions in both oral and written forms, using visual, sound/audio and digital materials across disciplines and contexts. It implies the ability to communicate and connect effectively with others, in an appropriate and creative way” (Council Recommendation on Key Competences for Lifelong Learning, 2018, p. 15). “Cultural awareness and expression competence” presents rather expected issues: “Competence in cultural awareness and expression involves having an understanding of and respect for how ideas and meaning are creatively expressed and communicated in different cultures and through a range of arts and other cultural forms. It involves being engaged in understanding, developing and expressing one's own ideas and sense of place or role in society in a variety of ways and contexts” (Council Recommendation on Key Competences for Lifelong Learning, 2018, p. 24).

The analysis of both competences proves that elements of cultural anticipation and creative interpersonal communications are present in the content. Undoubtedly they constitute a flourishing ground for the development of imagination. But at the same time it is quite worrying that in the text there is the evident loss of the imagination phrase. That can cause problems with the identification of the term (as it may be totally unrecognizable for teachers and students), what can finally give an effect of neglecting it during school and tertiary education practice.

On the contrary, we find the reference to imagination in the next domain – “entrepreneurship competence”, which in the skills segment is described as follows: “Entrepreneurial skills are founded on creativity which includes imagination, strategic thinking and problem-solving, and critical and constructive

reflection within evolving creative processes and innovation. They include the ability to work both as an individual and collaboratively in teams, to mobilize resources (people and things) and to sustain activity. This includes the ability to make financial decisions relating to cost and value. The ability to effectively communicate and negotiate with others, and to cope with uncertainty, ambiguity and risk as part of making informed decisions is essential (Council Recommendation on Key Competences for Lifelong Learning, 2018, p. 23).

The most surprising and even alarming fact is that imagination appears only in that last type of competences. It is assigned to the practical side of people's acting, encountering problems, and competing for gaining their aims. I would classify such interpretation of imagination to the first group of my division – the practical one. In other words imagination in various forms of education and in its lifelong learning concept seems to be only presented as a leverage to successful practice and concrete business activities. I feel very concerned when I confront that situation with the idea of desirable – but as we can see projected to be absent – human education in Europe. How in such conditions can we ensure the holistic, even spiritual development of our students? It turned out that contemporary education is not really complete and sufficient in face of individual and social challenges. So the more we become aware of the insufficiency of imagination in school work, the more we should learn about it and look for ways, teaching-learning methods, and good practices to implement the second type of imagination to education.

Basic set of values indispensable for humanistic education. Being convinced about the right of the human development towards each person's and each community's well-being and dignity, teachers should treat that challenge with special respect. The ultimate educational goal should be understood as the development of full human potential primarily referring to the enhancement of axiological foundations of education.

As the citizens of European Union first of all we should learn to respect such values as human dignity, freedom, democracy, equality (i.a. equality between women and men), pluralism, solidarity, justice, the rule of law and respect for human rights, including the rights of persons belonging to minorities (The Treaty of European Union, 2012, Common Provisions, Article 2; Charter of Fundamental Rights of EU, 2012).

Poland as a Member State of EU has its own, culturally rooted set of values and desirable attitudes which clearly correspond with pan-European ones. In 2017 a general reform of educational system took place. A new and revised National Curriculum has been implemented and now all Polish schools are

obliged to use it (Ministry of National Education, 2017). In accordance to the theme of my paper I present those notations from the document which refer to the students' task (creation of a musical fairy tale).

Goals and Objectives of Polish Compulsory Education (corresponding with the task):

- Introducing pupils/students into the world of values, esp. educate them to be supportive, to cooperate, to accept solidarity, to be altruistic, patriotic and respect tradition; show them the ethos of proper behaving and patterns of building interpersonal and social relations enabling a safe development of each student (family, friends);
- Strengthening the sense of individual, cultural, national, regional, and ethnic identity;
- Shaping students' sense of personal dignity and respect for dignity of other people;
- Shaping the attitude of openness towards the world and other people, towards activity in social life, and responsibility for the community;
- Aiming students to "approach" to those values. (Ministry of National Education, 2017, p. 11).

To supply the whole theoretical background used in the creative work on music fairy tales for the youngest group of school students I need to refer to notions included in the National Curriculum concerning general assumptions and guidelines in the field of music education for grades 1–3.

Aims of an Early Education stage (grades 1–3, age 7–9 years old):

- Supporting the multidimensional student's activity by preparing educational situations referring to realize experiments and increase experiences by multi-sensory activities, influencing the development of physical, emotional, social, and cognitive spheres (Ministry of National Education, 2017, p. 16).
- During lessons children should be curious and happy by discovering and learning new issues, should learn to understand their emotions and feelings (also of the others); students should learn about Polish national culture and should get acquaintance how to understand and create art; they should also learn about other cultures, *inter alia* by getting know other kids' games and cultural customs, their natural environment and traditional art (Ministry of National Education, 2017, p. 17–18).

Teaching-Learning Content of Music Education (grades 1–3) – general recommendation:

Music is that unique discipline of art which stimulates multidimensional, smooth, and holistic student's development. (...) It contributes to shaping the personality of a young man opened to the world and it's contemporary challenges. Development of students' sensitivity, imagination, and creativity is the main music's goal. The importance of music's emotional element is beyond question. It can be experienced through active (practical) music making and through its perception (Ministry of National Education, 2017, p. 21).

3 Methodology and effects of students' fairy tale creation

Building the foundation to my students' project work I made the introduction by presenting and analysing some quotations of fundamental authors in the field of fairy tales' theories. Students got acquaintance with thoughts of such celebrities as Bruno Bettelheim (1903–1990) – psychologist, psychiatrist, pedagogue, who in 1939 migrated to USA from Austria (Bettelheim, 1976); Vladimir Propp (1895–1970) – a Soviet folklorist and scholar (Propp, 1968); and sir Herbert Read (1893–1968) – an English art historian, poet, literary critic, and philosopher, best known for numerous books on art, which included influential volumes on the role of art in education (Read, 1974).

One of the key motives of students' work were the words of Bettelheim: "fairy tales can be interpreted from many points of view (...); similarly to other real works of art they include the whole wealth and depth to exceed the capabilities even of the most comprehensive discursive analysis. The issue I present only sketches a possible interpretation and it is optional in character" (Bettelheim, p. 63–64). My students also tried to express their own understanding of meaning and senses possible to transmit by such a significant cultural "product" as a fable. They had to discuss many aspects of a good fairy tale as an educational category and fit them to requirements specified in the task template prepared by myself. The structure of the template was built of general conditions and of assessment criteria. General conditions included clear principles:

1. A musical fairy tale is to be done by students of the Music Academy of Łódź, Poland from Instrumental and Vocal Faculties, who also prepare themselves to become music teachers at schools of general education.
2. Each musical fairy tale is created by teams of up to 5 students.
3. A tale must be recorded on a electronic/digital medium (only sound should be recorded – no pictures, photos, drawings or films!), in other words – each team prepares an e-fairy tale, by analogy, to e-book.
4. Presented e-fairy tale should be supplemented by: a) an information of parts of the content from curriculum which inspired authors in the work over the story of their fairy tale; b) a list of values which constituted the educational

tissue of a tale; c) an adequate mind map which would be the only visual record of team's work.

5. All fairy tales will be presented publicly in front of other students, and then collectively evaluated.
6. The duration of the tale must be about 20 min. It must end up with the clear moral.

Assessment criteria referred to specific expectations and requirements:

1. Compatibility of a title with the content of the story.
2. Compatibility of the content of the fable with information from the curriculum and chosen values.
3. Multi-sensory description (stimulating listeners' imagination and all senses to activity).
4. Quality and variety of musical effects (sound potential of your instruments, any other musical effects created by yourself, e.g. recorded water from the shower to imitate a waterfall).
5. Usage of any sound files downloaded from the Internet, music from CDs etc. is strictly forbidden! But as the background to the story you may use pieces played or sung by yourselves.
6. The story of the fairy tale must be interesting for a child of the 1. stage of education, so a way of speaking, the timbre of voice, proper diction, speed of transmission, good coordination between ones voice and type of fable's character, and the way of presenting the story, will be evaluated as well.
7. Each of the members of the team (his/her voice) must be heard on the record.
8. The story may take place in the past, in contemporary times, or in the future.
9. The story must have the logic course of events, though there may be a lot of fantasy, mysterious or odd situations
10. Characters may be real or fantastic, you may use personification of animals, of animate and inanimate nature, of other objects, or even of instruments.

Students created 14 teams. They had one month (May 2017) to prepare their final achievements. All of the work groups tried to meet the requirements, and most of the teams managed to do it properly. Before presentation many students expressed their opinion that the task was very tough and demanding because criteria were strictly formulated, but at the end they were truly happy and proud of their final realizations. Listening to the recorded fables we had a lot of fun. There were also moments of total silence when the audience was concentrated to hear the important elements of each plot and to pick up the clue of each story. We could listen to and experience wonderful musical fairy tales which were entitled:

Teddy Bear's Flute, Musical Clinics, Symphony, Magic Book, Appearances Can Be Deceptive, Stubborn Susan, In the Jazzland, Musical Adventures of Chocolate Doughnut, In the Shell Round the World, Sophie and Tophie in the Land of Sounds, Forest Music, Curse of the Red-Bearded, Three Sisters, and Magic Pencil-Case.

Referring to my favourite Latin proverb: *Verba docent, exempla trahunt* (Eng. *Words instruct, illustrations lead*) I present one of the fairy-tales – ***In the Shell Round the World***. The fable was created by a group of five instrumentalists – students of the Music Academy of Łódź, Poland: a violin player, cello player, French horn player, trombone player, and an oboist.

The fable refers to one of the typical fairy tale's motives – a dangerous trip of the hero happily ended. There were created eight characters of the story: 1) Narrator; 2) A snail – named Maciuś (diminution of a name Maciej) – violist; 3) A snail – named Staś (diminution of a name Stanisław) – French horn player; 4) A hippopotamus female – Matylda (opera soprano singer); 5) Mr. Owl – a wise doctor; 6) A huge spider – Mortimer (Transylvanian Wizard); 7) An ape monkey – Tadiki (African Wizard); and 8) A lonely Dragon – Chinese Wizard.

The story: Sunny spring morning in a small town near Łódź. Both close friends – Maciuś and Staś (snails) – happily go to school (music school). Entering the school building they hear a practising soprano singer – hippopotamus Matylda. In an effect of her high tones Staś's shell crashes into pieces. They go to the doctor – Mr. Owl. The diagnosis is dark... There is only a small chance to cure the shell. A mysterious mixture is needed. Maciuś has to collect the components of the mixture from the whole world. Though he is such a tiny snail, he does not hesitate even a second to help his friend. The doctor gives him a map and instructs him to meet with three Magicians/Wizards. Each of them may give Maciuś one component but only after solving, by a brave snail, a musical task. Maciuś starts his journey by hiring a balloon from a „Rent a balloon” office.

First stop: an old, secret castle in Transylvania with an odd and gloomy orchestra conductor – spider Mortimer and his animal orchestra! First task: figure out in which of the castle rooms is the rehearsal of string instruments. Maciuś passes the test very well and gets the first component – **a spider web**. It turns out that Mortimer is not so scary (long time ago he played with Maciuś's grandfather in the same orchestra).

Second stop: African village Tiki-tiki inhabited by monkeys and a shaman. Maciuś needs the **leaves of mysterious plant called buchubokko**. Our tiny snail has to pass another musical task (clap the rhythm) and pour out a little amount of water on a golden sand. Then a colourful flower with long leaves resembling peacock feathers grows out of the sand. Maciuś thanks the witch doctor and leaves the village to continue his journey.

Third stop: red Chinese temple hidden in a misty, green and mountainous interior. Strong smell of fresh Chinese tea. The task/condition to get the last component to the mixture – **one dragon tear** – is to play with the dragon glockenspiel (small school metallophone) and correctly repeat melodies. The snail and the dragon become friends, drink original Chinese tea, and play music till the sunset. During the farewell hug Maciuś promises to come back with Staś as soon as he gets well.

Back at home: the way back to Poland isn't easy. The thunderstorm is coming, but fortunately Maciuś gets home just before it and manages to mix all of the components in proper proportions. Then in the pouring rain he runs back to the hospital. The doctor – Mr. Owl professionally wraps the mixture round the snail's shell. Staś, knowing good manners and behaving correctly as a patient thanks his best friend. Maciuś – our small-great hero is touched by his happiness, and feeling embarrassed, hides himself in his shell. The sun starts coming out from behind the clouds.

Moral: "A friend in need is a friend indeed"

As the general conditions stated, apart from the fable itself students had to prepare and present all of the educational elements, constituting the context and background of their fairy tale proving at the same time the presence of their conscious, reliable, and professional theoretical choices and decisions. Thus first of all they had to analyse the ways of their thinking, inspiring each other in letting the imagination run wild in developing the plot, and discovering connotations with some cultural symbols or types of culturally existing fable's characters. They also had to show the stages of their synergic collaboration. In other words, apart from presenting to the audience the ultimate effect of their work they had to discuss in detail the turning points and phases in creating the story. Elements of the complex work are seen in the mind map (Image 1).

References to the National Curriculum pointed out by the authors of the *In the Shell Round the World* fable were:

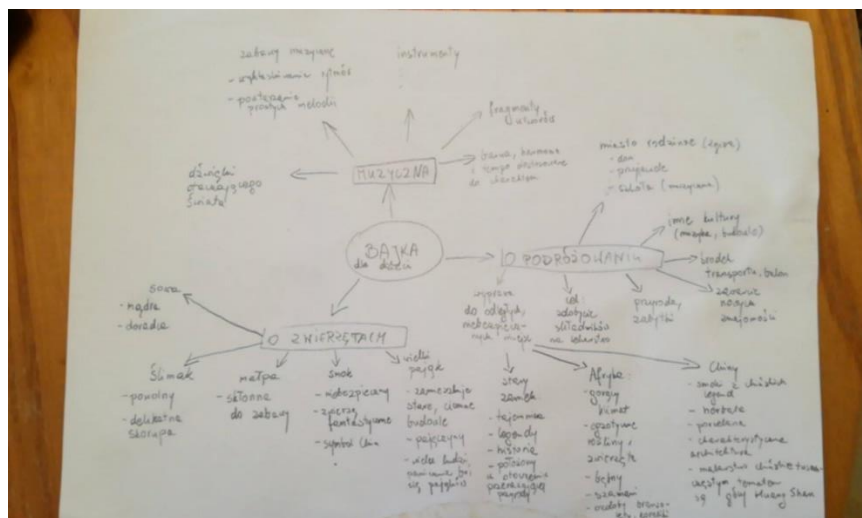
A student:

- tells the difference between notes: high – low, long – short, quiet – loud; between human voices: soprano – bass;
- tells the difference and gives names of some musical instruments;
- on the basis of listened pieces tells the difference between: sad, happy, jumpy, and marching music;
- by his body movement presents musical elements (dynamics, mood, note's height – pitch, tempo, articulation) and non-musical content (storyline/plot, emotions, interpretation/meaning of words);
- repeats rhythmic patterns and creates his own ones;

- experiments with sounds, and seeks new sounds using glockenspiel, xylophone, flute, or *flazolet* – a small Polish flute.

Values intentionally chosen by the students to build an educational fundament of their fairy tale and thus to transmit culturally rooted attitudes and moral interpersonal frames of communication, were: courage, friendship, altruism, openness, perseverance, devotion, support, and involvement (understood as an engagement in various activities, challenges, and tasks).

Image 1: *In the Shell Round the World* Mind Map (source: author's private photo gallery)



Conclusion

The world becomes more and more unified and flat. Visual communication is a dominating one which tries to appropriate the whole language, cultural, artistic, moral, and behavioural heritage of past generations. Thus various forms and dimensions of human existence are in danger.

If we want to maintain the variety of life and preserve the abundance of human achievements showing next generations understandable and acceptable senses of their complex development we should endeavour to put the problem of

imagination in the centre of contemporary educational issues. Imagination should again become an indispensable dimension of human existence.

Today the category of imagination is interpreted in two ways. First one – rational, pragmatic, and subordinate to the need of profitable use is the one accepted in social life. It has its place in theoretical bases of education and practical realizations. The second way – a “soft” one which refers to man’s interiority, person’s soul, human fantasy, creativity, and dreams is basically forgotten, rejected, underestimated, and nearly completely lost. If we want to preserve and responsibly continue holistic education hoping to give young generations a chance for optimistic and multidimensional life we need to restore the importance and meaning of that second type of imagination. The inner involvement, co-existence, and individual belief in necessity of usage one’s imagination should be carefully developed during the long teaching-learning process, starting from the very first stage of education.

That conviction has given me an impulse to turn back and look for inspiring forms of shaping young generations in the past. I found out that the world of fairy tales suited to my concept the best. Most of children love to listen to fables, experience their plots, and identify themselves with stories’ characters. Thus real life may merge with fantasy giving young listeners new sources and inspirations to develop their knowledge, skills, and moral sensitivity and attitudes to undertake and solve interpersonal contemporary challenges. The collaboration between words and music/other sounds – neglecting images – represented an additional asset to my idea.

That was the background of the task students of Music Academy of Lodz, Poland had to undertake. During their team work they proved that they were aware of the importance of axiological context of their work – by choosing the set of values and aiming to the moral. They also new and personally experienced how important it was to find and properly use words and sounds to present and express the proper context of the story, intensions and emotions of characters, and the atmosphere of adventures. Imagining the tension of words and adequate music/sounds to parts and situations of the stories they created fairy tales which were not only interesting, exiting and funny, but fulfilled with educational and cultural expectations. They presented a very high level of “applied” “soft” imagination that had developed students’ language and music competencies. There is no doubt that such creative realizations would later enhance school children’s imagination and develop their language and music literacy. Language skills would refer to the ability of describing people, animals, objects, phenomena, and processes, would refer to the ability to choose adequate vocabulary, to increase the number of wordings, and of course to use them in the

way corresponding to a presented situation. Language literacy is also strictly connected with oral presentation, what clearly corresponds and harmonises with the traditional form of fable telling. At school music literacy is developed according to expectations placed in curriculums. In our example thoughtful and matching choices of the music content were easily seen thanks to decisions made by students. Chosen educational effects became core elements of the fable's background. Thus, one may say that a music fairy tale positively answers to the need of cognitive and multisensory education.

It is also worth underlining that vast contact with ambitious music, combined with rich and diverse language creates the fundamentals for desired and educationally expected students' progress of school general achievements. It provides opportunities to develop different aspects of learning, like "the opportunity to express ideas and emotions, enhance and focused perception, the opportunity to make connections, to observed layered and complex relationships between diverse forms of knowledge, being able to construct and organize new meanings, to perceive and understand various points of view, to imagine new possibilities, and to provide opportunities to sensory learning" (Hallam, 2015, p.73).

Students of Music Academy of Lodz, Poland who I worked with had the possibility to try and practically experienced the challenges connected with the need to uncover and develop one's imagination. In our academic relation they had to practise on themselves facing all of the difficulties and efforts to gain the planned educational and artistic aims. Undertaking the endeavour of developing imagination is not an easy task. There is no one best pattern or recipe how to make somebody more creative. Though imagination is an individual feature, talent or capacity to invent or create something, we can still work on it.

So, working with my students I have presented them a concept – a framework of three ultimate spheres. It consists of: axiological dimension, language/vocabulary dimension, and of music/sound dimension. Analysing their fairy tales, I can confirm that references they have done to my framework prove the usefulness of the instrument. It inspires to use imagination in most creative/fantastic way, and at the same time expects to match it to more realistic anticipations. I am sure that our work on music fairy tales was a strong emotional, intellectual, and creative experience for the students. That is why I hope they will have courage to return to the problem of imagination as self-reliant school teachers. They will be capable to introduce and undertake attempts to develop their school children imagination through the fascinating form of multisensory fairy tale.

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Sociocultural, intercultural and translation competence for engineering students

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Abstract

Targeting at adequate translation while teaching translation to engineers any teacher should remember about social and cultural discrepancies between languages. The difference in mentality should not be reflected in the special target text. Engineering students are supposed not only to be able to find proper equivalents and render the terms appropriately but also to analyse the communicative situation and cultural peculiarities of the source text. Teaching professionally oriented translation depends on many factors including ontological and specialised cultural levels, technological progress and its incorporation into the national, international and global culture, linguistic diachrony and its role in terminological corpus formation as well as science and technology institutional role. Teaching translation at engineering academy has a long and fruitful history, which shows the efficiency of training intercultural and sociocultural competence in teaching translation. It allows to avoid serious drawbacks in translation when a translator confronts the other language culture images and concepts.

Key words: engineering, education, translation teaching, sociocultural competence, intercultural communication.

Background concepts

The problem of culture awareness has been discussed by many specialists for centuries in different languages either with the reference to translation or to language learning or teaching as well as with a focus on other Humanities discourses. English Language and Culture Dictionary editorial (1992) hope that learners will “make up the complex fabric of English-speaking life and culture” (p. F7) when they use the dictionary. Ter-Minasova, being the author of the profound research on “Language and Intercultural Communication” quotes about 10 definitions for the word “language” and 6 definitions for the word “communication” (2000, p. 7) as comparable in different languages with almost relative equivalence. When she approaches the word “culture”, she states its polysemantic nature since about 7 different meanings of the word occur in

Russian and all European languages. It is possible to outline the similarity in the meanings of the word when it is interpreted from the anthropological or ethnographic points of view. With reference to the meaning, Table 1 provides four definitions of the word *culture* from different English dictionaries.

No	Definition	Dictionary
1.	Culture — the way of life, especially general customs and beliefs of a particular group of people at a particular time. <i>Youth / working class / Russian / Roman / mass culture</i> (CIDE).	Cambridge International Dictionary of English. Cambridge University Press, 1995.
2.	Culture. 1) Culture or a culture consists of the ideas, customs, and art that are produced or shared by a particular society (e.g. <i>He was a fervent admirer of Roman and Greek culture... the great cultures of Japan and China</i>). 2) A culture is a particular society or civilization, especially one considered in relation to its ideas, its art, or its way of life (e.g. <i>the rich history of African civilizations and cultures</i>) (COBUILD).	Collins COBUILD English Dictionary. Harper Collins Publishers, 1995.
3.	Culture — 1) the customs, civilization, and achievements of a particular time or people (<i>studied Chinese culture</i>) (COD).	The Concise Oxford Dictionary. Oxford University Press, 1964.
4.	Culture — the customs, beliefs, art, music, and all the other products of human thought made by a particular group of people at a particular time (<i>ancient Greek culture, a tribal culture, pop culture</i>) (DELC).	Dictionary of English Language and Culture. Longman Group Ltd., 1993.

Tab. 1: Culture definitions registered by English Dictionaries (Source: Ter-Minasova Svetlana. (2000) Language and Intercultural Communication. Moscow: SLOVO. Print. P.7.)

Regarding the word *culture* as a term one considers it to be equivalent to the sole meaning. The more incongruent interpretations the term possesses the less clear it is. The term *culture* seems to be important for many contemporary researchers. In 2016 a paper on "Iranian EFL Learners' Attitude towards Culture Teaching" was presented at the CLEAR 2016 conference (Samvati, 2016). The author quotes a lot of relevant sources and definitions of the term discussed by other authors: Goodenough's (cited in Wardhaugh, 1986) vision of society's culture "whatever it is one has to know or believe in order to operate in a manner acceptable to its members, and to do so in any role that they accept for any one of themselves" (p. 210); Kramsch's (1998) definition of *culture* as "a system of standards for perceiving, believing, evaluating, and acting" (p. 10); Brown's (2000) interpretation of *culture* as "a way of life" (p. 176); Richards and Schmidt's (2010) culture perception as "the set of practices, codes and values that mark a particular nation or group: the sum of a nation's or group's most

highly thought of works of literature, art, music, etc." (p. 151), and finally Bayyurt's (2006, p. 235) conclusion on the term while citing Adaskou, Britten, and Fahsi who categorize the definition of *culture* as a concept with aesthetic, sociological, semantic, and sociolinguistic dimensions. According to Samvati (2016), each of the authors implies the idea of language teaching into their images of the *culture*. However, none of them seems to indicate the time-category for the definition. Living in the era of the vigorously developing technical progress, everyone should understand the importance of the time category for technical or even high-technological culture as a constituent part of our global existence.

The word *culture* comprises the ideas of diverse customs, traditions, habits, beliefs, backgrounds and ways of life which take place at or characterise a certain historical period or certain time. As for the term *intercultural communication* it represents mutual understanding/relationship and verbal/non-verbal interaction between at least two interlocutors, participants of the communicative act. Both of the communicants in the intercultural communication should belong to different national, ethnic, or any other minor cultural groups/subgroups/communities. Intercultural communication starts on the threshold of every university when students from all over the world enter the university. Engineering Academy of Peoples' Friendship University of Russia welcomes the young and enquiring ones and they do not come only from Russian Federation, but also from other countries and continents (Asia, Africa, Latin America, and Europe). Thus, intercultural communication occurs in its most vivid and natural form.

Methodology

Teaching environment

Socio-cultural approach at the RUDN University Engineering Academy is bound to be discussed as far as the university students belong to different national cultures, as long as the "science culture" is considered to be a part of the common culture, is subject to the students' social incongruence, and is stipulated by the translatology demands. Every RUDN student regardless their special/major discourse interests alongside with the learning of the second, third, etc. languages acquires one more supplementary training course "Translator in the Field of Professional Communication" (Malykh & Stanilovskaya, 2014) accounting for about 1500 hours within four years of university curriculum.

To imagine how vast the diversity of the scientific and engineering realms of the Engineering Academy is one should learn about its 16 Chairs and 4

Departments (RUDN University, 2017). Students major in a variety of research fields from “Seismic Safety of Buildings and Engineering Structures” to “Energy Efficiency and Reliability of Industrial, Civil and Hydraulic Structures”; from “Computational Methods for the Synthesis of Dynamic Systems of Intelligent Control Systems” to “Resource-Saving and Resource-Reproducing Innovative Technology Study and Development of the Earth Interior”; from “Engineering and Physical Nanotechnologies and Nanomaterials” to “Development of Methods and Means of Improving the Efficiency of Machinery and Equipment for Construction and Mining Operations” (as well as in “Design and Geochemistry of Paleovolcanic Systems, the Search for Endogenous Mineralization, Atmogeochemical Prospecting of Oil-fields”; “A Study of Geometrical Parameters and the Establishment of Methods for Calculating the Strength of Non-canonical Shells Referred to Arbitrary Coordinates with Geometrical and Physical Nonlinearity”; “Energy Efficiency and Environmental Friendliness of Vehicles and Systems”).

First two years RUDN students intensively learn foreign (second, third, etc.) language for general purposes (LGP). The students have an opportunity to choose either to start learning German, French, Spanish from the elementary levels (A1/A2) or to develop their skills in English (A1/ A2; B1/B2, according to Common European Framework of Reference for Languages, i.e. CEFR). The 3^d and 4th year students develop their skills in the field of theory and practice of translation, rendering and reviewing the texts within their scientific discourse. In the final semester of their fourth year, the students prepare and defend their Bachelor Thesis and their Translation Course paper. In the course paper a student should present the translation of the scientific text bound to their Bachelor major subjects as well as to compile a relevant glossary and perform the translation analysis with the number of syntactic or lexical problems professionally outlined and discussed in the paper.

Should the translation course paper be evaluated it discloses a range of translation teaching problems every teacher is confronted with. The first level of the student’s cultural awareness is revealed by the choice of academic words and engineering terms, which show the engineer-to-be competence in the vocational field. The second level assessment should regard the number of syntactic structures, their correspondence to the source text as well as to the translator’s achievements and abilities to render the gist of the special text. The third level shows the translator’s performance/proficiency in resorting to proper translation transformations that create the target text with the required adequacy, appropriate level of technical standard and documentation formality, i.e. metasemiotic equivalence. Speaking about the levels, we mean the ontological, epistemological and axiological aspects as applied to the target text

as a translation practice product. Thus, the paper can demonstrate personal/individual proficiency and competence allowing the student to implement their linguistic skills in building a translator's career at any international/ global engineering company as soon as they graduate from the university.

Results and discussion

Sociocultural, intercultural competence as teaching horizons

Culture comprises human activity in its most conspicuous forms, personal, collective and expressive. Every social institution can function in presence of language, and in its turn, language supports cultural manifestations in any of the socially dependent forms. The interdependence of the concepts is cemented by the translation process as it is: "Translation, involving the transposition of thoughts expressed in one language by one social group into the appropriate expression of another group, entails a process of cultural de-coding, re-coding and en-coding. As cultures are increasingly brought into greater contact with one another, multicultural considerations are brought to bear to an ever-increasing degree" (Karamanjan, 2002).

The most complicated stage of the process is to persuade the target culture recipients, to translate, transfer, and convey the message; to make a bridge between the source and target cultures.

Writing is regarded to be the most difficult of the English learning skills especially when it deals with English for Academic Purposes/English for Specific/Scientific Purposes (EAP/ESP). One of the most difficult features of the skill is to distinguish low-level writers from more advanced writers. For a decade from 1991 to 2002 there was conducted a lot of research in the field of performance-based assessment (Becker, 2010). The Engineering Academy students have an opportunity to be certified in one of the Cambridge Assessment Tests/Exams (PET, FCE, CAE, BECs), Goethe Institute Test DaF, French language DELF/DALF test, which makes them globally competitive. Apparently, the tests embrace different skills achievements without focusing on the written skills as the Test of Written English (TWE) does within the TOEFL® framework aimed at evaluating independent or integrated writing tasks. But the tests do not assess the level of student's proficiency in translation and especially in scientific or engineering discourse texts' translation. Though it should be admitted that students when they learn how to translate do not deal with the writing tasks by and large. They are mostly concerned with the levels of adequacy, equivalence and requirements for the proper grammatical and syntactic structures in both

the Source Language (SL) and the Target Language (TL), they work with transformations of the source text (ST) and target text (TT) corresponding the overall stylistic and register requirements. When the students strive for a master's degree with the background in translation they work in the field of EAP/ESP writing and speaking which enhances further their translation competence as well.

Engineering Academy students deal mostly with the scientific and engineering discourses. Considering the difference of scientific and literary texts one should enlist the most culture dependent areas in both. Though the latter are entirely culturally interwoven, permeated with the culture, the former are less stipulated by the cultural intrusions. Definitely, the scientific discourse is logical, precise, reasonable and rational, objective, denotative, standard and truthful to a particular reality, abundant in terminology, specialised items, symbols and formulae. (Al-Hassnawi, 2010) To be absolutely objective, a translator-engineer working in a particular scientific discourse is not absolutely detached, isolated from culture in its either narrower or broader sense, otherwise the translator would be associated with an automaton. But even in the engineering discourse a translator should be prepared for what is dictated by either cultural awareness or social strata belonging. Normative documentation, technical specifications and manufacturer's instructions, patents and contracts, every of the areas causes the translator to compare and contrast the realia of the SL and TL, of the ST and TT.

Professional culture creates another culture spectrum. A translator as a mediator should switch between the languages or even replace his/her knowledge of the national culture with the ST author's mental representation of the text, discourse. The translator should be acquainted with non-native cultural entourage, with the L2 or L3 features of communication, social and professional traditions and their routine, organisational, structural, hierarchical, technical and interior environment of both languages' in professional spheres - at the enterprise, plant, R&D Department or research conference and scientific workshop. Enumerating the translator's duties and liabilities, responsibilities and assignments should not be briefly highlighted or left beyond the subject of sociocultural approach in teaching. Intercultural, sociocultural competences build up a solid foundation, a proper background for a translator-engineer-to-be.

Approaches implemented – competence acquired

Being a part of the Bologna process a RUDN University graduate as well as any other university graduate should be competent in different spheres of life, competitive and qualified as a specialist but he/she should not be limited solely to their professional scope. A specialist should possess a set of mandatory

competences including the translational, sociocultural and intercultural ones. According to Komissarov (2002), the producer/sender of the message and the recipient of the message in the intercultural communicative act are representatives of two different cultures, two different languages on the one hand. On the other hand the translator mediates between these two people/groups, decoding, re-coding and encoding the same information via the means of languages and cultures from one person to another, from one culture representative to another, from one group to another. The translator is a bilingual and bicultural individual of the act. Thus, translation is a phenomenon where diverse cultures confront, various epistemological values are compared, different personalities, unlike mentalities, multifarious literatures, epochs, social, traditional, behavioural backgrounds contrast each other. A university student should be set for the challenging translator's goals. A university teacher should assist in the process. That is why when students's attention is drawn to at least fragments of the world literature specimens students could not be declared as deprived of the humanities education and world cultural heritage. Thus, students learning English-Russian translation read Romantic essays in class which broadens their minds and cultural awareness (Anosova, 2009).

A professional community as well as socially homogenous one, e.g. a status group, could be accepted as representatives of one culture in a narrow sense of the term. In contrast with the ontogeny culture a specialised, vocational, professional or academic culture is characterised by a wider educational background, social difference, labour specialisation, and systemic and structural institutionalisation or organisation. Specialised culture as well as specialised education encourages an individual to get incorporated into the specialised community, professional clubs, vocational groups.

Science and technology development brought the society to the 'science culture' as an indispensable part of the common, mainstream culture. A bilingual translator is supposed to be at least 'bicultural'. Both in Russian professionally oriented texts and in any other language texts of the kind there is a corporate culture influence, normative documentation, and formality standards framework which dictate distinct features of the texts. Moreover, the science and technology institutions are regulated by certain laws, norms, rules, guidelines, regulations and instructions, as source texts which in their turn should be noticed by the translator and rendered in the most suitable or apt form into the TT. These cultural discrepancies are not the subject of the several classes on translation. From the very beginning the translator in the professional communication is bound to pay a duly focused attention to the culture and social or professional institutions' peculiarities. The institutions play a conservative role in formatting

the requirements to the language usage; the engineering students should understand both the importance of the cultural dissimilarities and the way to bridge the linguistic gap.

Conclusion

The sociocultural inconsistencies in translation cause the greatest embarrassment in the target audience perception. A translator could be a specialist in the field of translation but if the specialist is unaccustomed to the images of the other culture corresponding to the ones in his/her own culture, then, the translation will definitely lack the equivalence. At present stimulated by the globalisation processes opposing approaches are expanding. One tends to derive the social and cultural similarities from the ST close to those in the TT (Dridze, 2000). Another approach once supported by Bakhtin* (2012) deals with looking for contrasts between cultures and this approach is more productive for translation because it encourages or even enforces the comprehension of new perspectives, acquisition of the new knowledge. Thus, while teaching translation to students, while preparing them to grasp the professionally oriented texts, the discrepancies between the sender's 'world image' and recipient's 'world image' should be emphasised. This will assist in overcoming language barriers, in searching for distinct equivalence, which in its turn is leading to the adequate semantic-stylistic translation. This will enable students to master sociocultural, intercultural and translation competence to their best advantage.

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Appendix 1

*Bakhtin's idea of the dual linguistic vision of the world is supported by N. J. Marr's quotation from Willamowitz-Moellendorf's book on Plato. The Bakhtin's quotation is drawn here as it appears in Russian: «Н.Я.Март в одной из своих работ касаясь вопроса о скрещивании языков как основном факторе становления внутреннего развития языков, приводит следующую цитату из Виламовица Мёллендорфа (из его книги о Платоне): "Лишь знание языка с иным мышлением приводит к надлежащему пониманию своего языка..." (Март, 1933; Willamowitz-Moellendorf, 1920) Не буду продолжать его цитаты. Дело в ней идет прежде всего о чисто познавательном лингвистическом понимании своего языка, понимании, осуществляемом только в свете другого, чужого языка: но это положение не в меньшей степени распространяется и на литературно-творческое понимание языка в процессе художественной практики.

Более того, в процессе литературного творчества взаимоосвещение с чужим языком освещает и объективирует именно миросозерцательную сторону своего и чужого языка, его внутреннюю форму, присущую ему ценностно-акцентную систему. Для литературно-творящего сознания в поле, освещенном чужим языком, выступает, конечно, не фонетическая система своего языка, не его морфологические особенности, не его абстрактный лексикон, — но именно то, что делает язык конкретным и не переводимым до конца мировоззрением. именно стиль языка как целого.

Для литературно-творящего двуязычного сознания (а таким и было сознание литературного римлянина) язык в его целом- свой-родной и свой-чужой — является конкретным стилем, а не отвлеченной лингвистической системой. Восприятие всего языка снизу доверху как стиля — несколько холодное и «овнешняющее» восприятие — было чрезвычайно характерно для литературного римлянина. Он и писал, и говорил, стилизуя, не без некоторой холодной отчужденности от своего языка. Потому предметная и экспрессивная прямота латинского литературного слова всегда несколько условна (как бывает условной всякая стилизация). Элемент стилизаторства присущ всем большим прямым жанрам римской литературы, есть он и в таком великом творении римлян, как «Энеида».» (Bakhtin, 2012)



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Conceptualization of negative emotions in modern linguistic consciousness (on the material of Russian, English and Slovak linguistic cultures: a contrastive analysis)

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Abstract

The article aims to provide cross-cultural insight into the examination of emotion “envy” through comparative description of the emotional worldviews in Slavic (Russian and Slovak) and non-Slavic (English) linguistic cultures represented in the form of the concept. The obtained results have allowed us to clarify some common and different features of Slavic and non-Slavic nations in the realm of display the emotion “envy” to explore cultural peculiarities of nations and to contribute to the professional training and practices of professional dealing with international communication. The article also seeks to enhance public awareness on the following important issues: how cognate are perceptions of Slavic and non-Slavic nations; what universal features and cross-cultural differences are in regulation, somatization, the degree of prototypically of a seemingly equivalent concept, and how cultural rules influence the shaping of meaning and the expression of the investigated emotion in discourse.

Key words: concept, cognitive linguistics, envy, emotion, Russian, English, Slovak.

Introduction

The subject of the present research is the negative emotional concept “envy” in Russian, English and Slovak linguistic cultures. The present article focuses on the comprehensive comparative analysis of objectification of the emotional concept “envy” in languages with different structures. The issue is of scientific and practical interest not only because it conducts a comparative research of Slavic languages in comparison with a Germanic language, but it also conducts a comparative research of the emotional worldviews in Slavic linguistic cultures: in the Slovak linguistic culture as part of the Western culture, belonging to Slavia Latina group and the Russian linguistic culture, belonging to Slavia Orthodoxa

group. It should be noted that in the modern linguistics theoretical researches of a comprehensive study of emotional concepts in the comparative perspective on the material of several language groups are represented only in fragments, although the problem of universality, on the one hand, and the cultural identity of names of emotions on the other hand, is one of the leading topics of the discussion in the mainstream of conceptual analysis. Therefore the subject is relevant in the contemporary linguistics because the issues of comparative description of the emotional worldview of different languages: Russian, English and Slovak have not been sufficiently developed yet. The beginning of the study concerned the investigation of the concept "envy" in idioms (Grigorjanova, Matytcina, 2015) and in poetic and prose texts (Grigorjanova, Matytcina, 2016).

The emotional concepts as components of a linguistic worldview require the special research, since the verbalization of emotions in different linguistic cultures is not always the same as the shape and volume of emotive meanings. Difficulties of translation of emotional concepts from one language to another are caused by the specifics of their place in the national worldview and require its review from the conceptual, comparative and lingvo-cultural aspect. The coincidence of the core, i.e. notional part of the concept does not mean the identity of its periphery – evaluation and numerous images associated with it. It is submitted that at the present time, there is a need for a comprehensive analysis of the structure of the concept as an emotional fragment of the national linguistic worldview taking into account the peculiarities of the language structure of the compared languages.

Based on the foregoing, the relevance of our research is defined by the following points.

Firstly: The study and the description of emotions is situated in the center of the interests of anthropological linguistics, the interest of modern linguistics to show the nations mentality through the language, reflecting separate fragments of the linguistic worldview, has been constantly increasing. The linguistic reflection of the emotional concept "envy" as the fragment of the emotional internal world of man may become part of the study of a linguistic worldview in general and contribute to the study of ethno-semantic personality in Russian, English and Slovak linguistic cultures.

Secondly: It is submitted that at present there is a need of studying emotional concepts as an element of the ethnic identity of the individual speaker and the group in the context of the progressing dialogue of cultures. Lack of the comprehensive research of emotional concepts in comparative perspective of languages with different structures has determined the choice of our research subject.

The object of the present research is the emotional concept "envy", verbalized by means of lexical, phraseological and paremiological units in Russian, English

and Slovak linguistic cultures. This research has been carried out with the involvement of illustrative examples of phraseological fund, folklore, literary texts and other sources, reflecting the situation in which the subject is in a state of an emotional experience. The scientific novelty of the research is that it is the first attempt of a comprehensive conceptual analysis of the objectification of the emotional concept “envy” as the fragment of the national linguistic worldview in languages with different structures: Slavic languages in comparison with a Germanic language; it is the first attempt to establish some specific features of emotional worldviews in the studied linguistic cultures defined by the ideas of each linguistic worldview. The following hypothesis is the basis for the research: a conceptual analysis of an emotional concept in languages with different structures will allow describing some peculiarities of Russian, English and Slovak linguistic worldviews. The objective of the research is to collect, summarize, analyze and systematize the necessary information to make the system comparative research of the emotional concept “envy” as a complex, multidimensional, verbalized and mental formation on the material of Russian, English and Slovak languages. The following tasks are put forward in accordance with the objective:

- 1) to identify the scope and content of the notion “emotional concept”;
- 2) to compare the structure of the emotional concept “envy” of different languages and to clarify the common and distinctive traits of characteristics;
- 3) to reveal the specifics of the metaphorical, idiomatic and paremiological comprehension of the emotional concept “envy” in Russian, English and Slovak languages;
- 4) to analyze the notional, figurative and definitional components of the emotional concept “envy”.

Theoretical framework

The comparative studies of emotional expression in different linguistic cultures are extremely important because according to Dorfman, “every time we are attempting to ride emotions we have to wonder again and again how difficult it is to bring them under any general subject area and to harness them in the logic of a particular paradigm ...” (Dorfman, 1997, p. 138). There are some studies, which contain the conceptual analysis of emotions. However, the system researches of emotional concepts in comparative aspect of two Slavic and non-Slavic linguistic cultures have not been taken yet.

Thus, a comprehensive study of emotional concepts in a comparative aspect of Slavic and non-Slavic linguistic worldviews is a new line of study arousing a great deal of interest. Such studies are in the forefront of linguistic development, since they look at how emotions are reflected in the language and in the linguistic

worldview, and, thus, serve to develop an anthropocentric description of the language.

The present research is related to all three study lines, since, on the one hand it aims at describing and analyzing an emotional concept, on the other hand the analysis of the phenomenon of emotions in the language conceptual space contributes to a better understanding of the essence of the linguistic worldview and, last but not least, it deals with linguistic worldview as a whole, since it studies the language as a carrier of certain national mentality and problem solutions should definitely be based mainly on the methods of cognitive linguistics.

The main goal of cognitive linguistics research is to show how cognitive processes are reflected in the language. The object of cognitive linguistics research is concept. *Concepts* are perceptions about elements used in human thought, and they reflect the result of human experience, knowledge, all human activity and cognition. The concept as the knowledge about the fragment of the objective world in all its connections and relationships can be reconstructed through its linguistic reflection. Y. Stepanov defines the concept as “a bunch of culture” in the form of which it enters the mental world of man (2001, p. 43). Thus, cognitive linguistics is focused on studying how the process of conceptualization of the fragments of the objective world is going and how during this process concepts are formed in the consciousness.

The understanding of concepts in world linguistics is highly variable. Wierzbicka has made an important contribution to the development of the concept theory. According to Wierzbicka, concepts are nationally specific that is important for the comparative research of the cultural identity of people (2001, p. 23). Lakoff points out that conceptual structure is meaningful because it is *embodied*, that is, it arises from, and is tied to, our preconceptual bodily experience (1980, p. 265). As to Russian linguistics there have also been different approaches to *concept*: linguistic approach – when the concept is presented as the potential word meaning with its connotative element, cognitive – in which the concept is seen as a global mental unit and cultural – where the concept is understood as a basic unit of culture in the man’s mental world.¹ The authors of the present article have based their research on the theories evolved both in Russian linguistics and in the works of a number of Western scholars. The ambiguity of concept interpretation is caused, firstly, by interdisciplinary character of the concept used in the whole complex of sciences, including different linguistics directions, and, secondly, by the complexity and

¹ During the Cold War isolation Russian and other Eastern European linguists remained dissociated from the mainstream of formal linguistic theories and developed home-grown traditions, some of which became known in the West (Rakhilina, 1998, p. 274-323).

multidimensionality of the phenomenon. The analysis of the various definitions and approaches to the term “concept” in modern literature enables the author of the project to consider *concepts* as complex discrete units of consciousness by means of which the process of human thought is carried out. The description of emotions, their essence and culture specification is possible only through the analysis of the linguistic means by which these emotions are represented, in other words, through the analysis of *emotional concepts*.

Thus, in this study the concept studied is perceived as an emotional concept, while the units of linguistic analysis implementing it are linguistic means. In the present study “*emotional concept*” has been provisionally defined as ethnically, culturally caused, complex structurally semantic, mental, usually lexically and / or phraseology verbalized unit, based on a conceptual basis, which includes, in addition to notion, image, cultural value and functionally replacing in the process of reflection and communication objects (in the broadest sense of the word) of the world for the man, causing a biased attitude towards them on the part of the man.

The culture-specific and the ethno-specific components of the concept, allowing to speak about the concept as a conditional mental unit are used in the integrated study of the language, consciousness and culture are also in the focus of attention of the present project. Thus, in this sense the concept is the structure of consciousness where the values of society are fixed, and which bears “the mark of the spiritual experience of the person of a certain culture” (Tilman, 1999, p. 9). Taking into consideration all the aforesaid, in this work under the *emotional concept* we understand *a mental construct which has notional, figurative and definitional components, which is stored in the memory of the national speakers and implemented in views, knowledge and associations expressing the cultural identity of the ethnic group.*

The *concept* is closely associated with the *worldview*. The worldview is our view of reality; holistic, global image of the world, which is the result of all spiritual activity of man: all his ideas about the world, all contacts with the world. If the world is a man and the environment in their interaction, the worldview is the result of the processing of information about the environment and a man (Maslova, 2001, p. 160).

The language is the most important method of knowledge formation about the world. Depicting the objective world during the activity, a man fixes the results of his knowledge in words. The totality of the knowledge embodied in the form of language represents what is called the *linguistic worldview*. The *linguistic worldview* is understood as a system of value orientations encoded in associative-image complexes of language units and recoverable by the researcher through the interpretation of associative-image complexes by means of reference to their signs and culture concepts. Each language has its own linguistic worldview

according to which a speaker organizes the content of the utterance. Specific human perception of the world, fixed in a language, is manifested this way (Oparina, 1998, p. 375).

If the *worldview* is usually understood as “grid coordinates through which people perceive reality and build the perception of the world that exists in their minds” (Gurevich, 1972, p. 15-16), the *linguistic worldview* is usually determined as a “historically developed in the everyday consciousness of the language community and reflected in a language the set of beliefs about the world, a certain way of reality conceptualizing” (Zaliznyak, 2011, p. 1). Academician Y. Apresyan and his school formulated two important methodological positions concerning the linguistic worldview: 1) in the linguistic worldview “a naive worldview” is reflected; 2) every language “paints” its own picture depicting the reality a little differently than other languages do. The *linguistic worldview* is created by means of linguistic units (lexical and idiomatic, imaginative, phonosemantic), and with the help of functional and discursive means of the language (Apresyan, 1995, p. 348-388). A *conceptual domain* of a specific language like a mosaic is composed from the concepts of the culture and it draws the *national linguistic worldview*.

Alongside with the *linguistic worldview* we should speak more specifically about the *emotional worldview*, associated with the study of emotive and emotional concepts, where the emotional concepts are an essential tool for its analysis. The *emotional worldview*, which objectively reflects the existing reality through the prism of human emotions, is formed by the emotional concepts and reflects universal and cultural-specific understanding of the emotional experiences.

Methodology

In modern linguistics there are lots of approaches to the research of a *linguistic worldview*. One of such approaches is the method of conceptual analysis. The purpose of the conceptual analysis is to consider the ways of the linguistic expression of concepts and to study concepts as “units of a conceptual worldview of linguistic identity of the author” (Bolotnova, 2003, p. 83). The conceptual analysis of emotional concepts in multi-structural languages will allow to describe some of the features of Russian, English and Slovak *linguistic worldviews* and to establish differences and common features in the implementation of emotional concepts in Russian, English and Slovak linguistic cultures.

The following methods of research have been used: method of definitional analysis to describe the semantic content of units that represent the emotional concept; method of etymological analysis that allows to consider the semantics of words, nominating the emotional concept; method of interpretative analysis that establishes the character of comprehension of the concept in the linguistic

consciousness; comparison and collation method that allows to establish the similarities and differences in the language conceptualization of emotions; contextual analysis that allows to determine the specifics of the functioning of emotional concepts in different types of texts; free association experiment.

In modern linguistics there is no universal sustainable model for a conceptual analysis and the existence of different methods of its implementation is a proof to it. Complex analysis will be the most comprehensive one when it is carried out with the consistent use of several mutually supportive techniques. We suggest that conceptual analysis should be carried out in four stages: 1) defining and etymological analysis; 2) paremiological analysis; 3) contextual analysis 4) free association experiment.

The aim of the first stage is conducting a definition based analysis in order 1. to determine the semantic features of the investigated concept; 2. to compare the amount of definitions in the appropriate languages; 3. to identify common for all examined languages definitional features of the concept; 4. to identify the definitional features that are unique to each language. During this stage it is important to identify the concepts' inner form in order to disclose the "initial idea" of the concepts and their historical sources. The analysis of emotional concept "envy" has been carried out on the material of historical and etymological dictionaries of Russian, English and Slovak languages.

The second stage of the conceptual analysis consists of an analysis of proverbs and aphorisms to identify national and cultural identity of the investigated concept, the content specificity in the conceptual domain of the speaker of the studied cultures. The material of the research is continuous sampling data from:

Dal', V. I. (1989). *Sbornik poslovic i pogovorok russkogo naroda v 2 tomah*. (The collection of proverbs and sayings of the Russian people in 2 volumes)

The Oxford dictionary of proverbs. (2008). Ed. by J. Speakes, 5th edition,

The Wordsworth Dictionary of Proverbs. (2006). Ed. by G. Apperson, Hertford.

Záturecký, A. P. (2005). *Slovenské príslovia, porekadlá a úslovia*. (Slovak proverbs and sayings)

Synonymický slovník slovenčiny. (2004). Ed. by M. Pisárčiková. 3rd edition. (Dictionary of Slovak Synonyms);

Fronek, J. & Mokráň, P. (2003). *Slovensko-anglický frazeologický slovník*. (Slovak-English Phraseological Dictionary);

Kvetko, P. (2014). *Prekladový anglicko-slovenský frazeologický slovník*. (English-Slovak Phraseological Dictionary);

Slovník slovenského jazyka V. Letters V – Ž. (1965). Ed. by Š. Peciar;

Zlatý fond digitalizovaných literárnych diel. (online). (Golden Fund of Digitized Slovakia Literary Works).

The third step is to conduct a contextual analysis of literary texts. It is the stage to highlight the functioning specifics of the emotional concept in different types of texts. Free association experiment which helps to get information about the understanding of studied concept by different groups of native speakers and is aimed at identifying the signs of peripheral features of the concept.

All the stages of analysis have been conducted in a contrastive perspective. The choice of the emotional concept "envy" as the subject to analysis is connected, firstly, with the particular value that this emotional concept has in the formation of an emotional worldview, reflecting axiological priorities in the national worldview. Secondly, with the high frequency of use of the emotional concept under investigation in proverbs and phraseological units of studied languages, in Russian literary texts (poetry or prose), as shown by frequency dictionaries (Zasorina, 1977; Ljashevskaja & Sharov, 2008), in American-English literature and in Slovak literary texts. Frequency indicates that the element belongs to the nucleus of the macroconcept (since the nucleus comprises the most important information of the concept).

The material for contextual illustrations has been taken from literary texts (poetry or prose) of Russian, English-language (American and English) and Slovak writers. To justify the choice of material it is important to remember that emotional concepts are a complicated mental complex including the core – the main semantic content, recorded in dictionary entries and the periphery-connotative and associative increments that are brought by culture and implemented under a specific set of words-representatives (Maslova, 2004, p. 115). Thus, to determine the meaning scope of the concept it is necessary to address not only dictionaries, but also to involve the analysis of a variety of contexts to identify peripheral signs of the concept. The results of the study show that an emotional concept "envy" as a construct of naive worldview is the subject of a large number of proverbs, metaphors and phraseology. It is a paremiological fund of the language as a genre of oral folklore where the specific features of ordinary ethnic group consciousness are kept. The knowledge reflected in proverbs is based on the everyday people experience as members of certain ethno-cultural communities, their traditions, customs and beliefs. Mythology reflected in proverbs and sayings is the "cultural minimum, knowledge of which is compulsory for all members of a given culture" (Karasik, 2002, p. 121), and their linguistic analysis allows to establish the value priorities of compared cultures. However, the description of the conceptual content of a concept on the material of proverbs and sayings does not give full confidence that the model of the concept established in this way will coincide with the concept that exists in the modern linguistic consciousness. This requires the current functioning analysis of different linguistic representations of the emotional concept in texts

of different genres and the data of psycholinguistic experiments that can give an idea about the relevance of concept features in the speakers' minds.

Results and Discussion

Stage 1

According to the *Etymological Dictionary of the Russian language* the word *зависть* [envy] originates from the Latin *invidia* and the verb *завидовать* [to envy] comes from the verb *видеть* [to see], supposedly based on the "idea of the evil eye" (Fasmer, 2004). According to the *Concise Etymological Dictionary of the Russian language* the word *завидовать* [to envy] has a "common Slavonic origin and is formed on the basis of common Slavic noun *завида* – *зависть* [zavida – envy] which is derived from the verb *завидѣти* – *завидовать* [zaviditi – to envy] (Shanskij, 1971). Envy as a "feeling of ill will and dislike of somebody" is recorded in Old Russian (OR) since the XI century and the adjective *завистливый* [envious] appeared in dictionaries in about 1771 (Chernih, 2008). According to the *Concise Etymological Dictionary of the English language* by Skeat (1963) the word *envy* is a lexical doublet got into the English language in the 1200-1300 from Old French (OF) as a lexeme *envie* which, in turn, is derived from the Latin *invidia* < *invidus*, having hatred or ill will < *invidere*, look askance, look angry. Middle English (ME) *envien* < Old French (OF) *envier* < Medieval Latin (ML) *invidiāre*, derivative of Latin *invidia* (envious).

The lexeme *envy* in Slovak – *závist'* [envy]. However, there is another lexical mean to express this feeling. It is *žiarlivosť*. Both of these lexemes, along with *envy* can denote another feeling – *jealousy*. In the Slovak language the lexeme *závist'* due to highly developed family of words and its derivatives (*závistivec*, *závistlivosť*, *závistlivo*, *závistivý*, *závistný*, *závidieť*) are used as actively as the Russian *зависть* [envy]. The lexeme *závist'* is also etymologically motivated by the verbs *vidieť* and *zrietať* [to see and to view]. In conjunction with the prefix *za-* [pro-] these verbs originally seemed to denote the ability to see something that is behind the obstacle, something hidden. The figurative meaning of verbs *zazirati* and *zaviditi* and their derivatives seemed to develop under the influence of beliefs in the evil eye. So, first the meanings "look askance, angry" and "see misconduct" appeared and then the semantics of these lexemes developed towards the definition of negative ethical concepts. For example, in OR a verb *zazirati* could have the meanings: *to condemn*, *to blame* and *to envy*; a substantiv *zazorъ* meant *sin*, *shame*, *suspicion*, *reproach*, *rebuke*, and finally *envy*; an adjective *zazorivъ* meant *enviable* (Stefanskiy, 2006, pp. 14-21). Obviously, the etymology of the word "envy" leaves no possibility of its positive interpretation. According to a Historical Dictionary of the Slovak language along with synonymous lexemes *závist'*, *zázrivý*, *závistlivý*, *zázrost'* and lexeme *krivý* was used as an antonym to *pravdovravný* (telling the true) (an antonymous couple of *krivda* – *pravda*) (the

false – the truth) with the meaning: *boss-eyed, lying, giving false evidence, unfair* (SHS, 2008). The word *závist'* [envy] was used in everyday life, and *krivý* and its derivatives – in court to determine some types of crimes related to giving false evidence (eg. *krivý svedok* - a false witness, *krivá prísa* - false evidence, *krivé obvinenie* – a false accusation). The proposed motivation of such act was envy. Lexemes *zázrost'*, *zázrivý* are archaisms and are not used in contemporary Slovak literary language (Kuchar, 2013, pp. 134-136). Thus, vocabulary sources indicate that the envy implies such negative ideas as resentfulness or contempt towards the person being envied and the conceptual correlation *evil eye* is common to all three studied languages.

Stage 2

The analysis of proverbs in the investigated worldviews reveals:

1) a kind of relationship between eyesight and envy where eyes is the main organ with sordid desires to possess something. In Rus. they are *очи, око, глазища, глазки* and metaphorically perceived as hungry, greedy, not knowing shame. In some proverbs eyes are *бездонный сосуд, на что ни посмотрят (взглянут, пучатся, окинут), всего хотят; разгораются желанием, глядя на чужое добро* [bottomless vessels, wherever they look at (cast a covetous eye) want everything; the desire heats up, looking at other people's property]. In some proverbs they are *вороги*, given deathwards: Rus. *завидущи глаза не знают стыда; у зависти глаза рачьи* [envy eyes do not know any shame; eyes like an envy crawfish]; / Eng. there are fewer cases with the element of eyes: *envy has smarting eyes; cast no greedy eye at another man's pie, envy is blind*; / Slov. a person obsessed with envy has poor eyesight: *málo vidí a moc závidí*.

2) in Russian in describing an envious person we can meet the reflected in the phraseological units spatial metaphors that are associated with a horizontal organization of space, while in the Slovak mentality, which is characterized by verticality (Alefirenko, Korina, 2011, p. 143), the spatial component is not explicated in describing an envious person: Rus. *звонки бубны за горами; завистливое око видит далеко; завидны в поле горох, да репа* [drums are loud far away; evil eye sees far; peas and turnips far are enviable in the field].

3) in addition to eyes another somatism is used in describing an envious man – hands: Rus. *гребут как грабли; хватают; захватывают; загребают; глаза (очи) завидущи, руки загребуши* [rowing as a rake; grab; rake]; / Eng. *greedy folk have long arms; grasp all, lose all*; / in Slovak such units have not been identified.

4) high prevalence of anthropomorphic metaphors: Rus. *зависть рождается и умирает; зависть терзает и сама терзается; зависть клеимит; зависть прежде нас родилась; завистливый от зависти погибает; злой плачет от зависти, а добрый от радости* [envy is born and dies; envy rankles and is rankled; it puts to shame; envy was born before we came; an envious man dies and

cries of envy]; / Eng. *envy eats nothing but its own heart; envy shoots at others, and wounds herself; envy never dies; envy envies itself; envy doesn't enter an empty house; envy feeds on the living; envy never has a holiday;* / Slov. *závist' zožiera vlastného pána [envy eats its host].*

5) figurative comparison with animals: Rus. *курица соседа всегда выглядит гусыней; на чужом дворе и курица с гуся; хороша рыба на чужом блюде; не то беда, что у меня корова сдохла, а то беда, что у соседа живая [neighbor's hen always looks like a goose; good fish is always on another plate; not matter that my cow died, the trouble is that a neighbor's cow is living];* / Eng. *it is good fish if it were but caught; the camel going to seek horns lost his ears;* / Slov. *susedova krava viacej mlieka dáva; susedova krava sladšie mlieko dáva [the neighbor's cow gives more milk; the neighbor's cow milk is sweeter].*

6) the idea that when you are envied gets a positive assessment in all lingvocultures: Rus. *лучше быть у других в зависти, нежели самому в кручине; лучше быть в зависти, чем в жалости [better to be envied than to be sorrow; better to be envied than to be pitied];* / Eng. *better be envied than pitted; it is better be spited than pitied;* / Slov. *nech radšej sto ľudí závidí, ako má jeden ľutovať; bohatstvo plodí závist', chudoba nenávisť [better hundred people envy than one regret; wealth gives rise to envy, poverty gives rise to hate].*

Stage 3

With regard to this study, the combination of the cognitive methodology with the contextual analysis method, considering any statement as the product of the social activity of the man included in the social interactions and a specific situation, provides a complete study of the concepts semantics, allows to find out common criteria for concepts categorization and to investigate common and specific features of their verbalization in different linguistic worldviews, Slavic and Germanic in particular.

The contextual analysis shows that the meaning "a feeling of discontent you have when someone possesses things that you would like to have for yourself" is common for emotional concepts *envy* in all studied languages and despite some slight semantic difference between concepts they can function identically, synonymously in the contexts of the studied languages. Here are some examples to confirm this statement:

Но ничему я не завидовал столько, как счастливому, благородно откровенному характеру Володи, особенно резко выражавшемуся в ссорах, случавшихся между нами [I envied Volodya's happy and frank character very much sharply expressed in our quarrels, this example and all subsequent examples are translated by TG. & MM].

He actually envied Jolyon the reputation of succeeding where he, Soames, had failed.

Ludia ich pozorujú so závišťou i s podozrením: vyzerajú tak šťastne, tak nevinné ... [People looked at them with envy and suspected they looked so happy, so innocent...].

The analysis of the notional part of the concept on the basis of factual material in combination with the study of data from lexicographical sources of Russian, English and Slovak languages indicates the number of additional shades of meaning of the concept *зависть* / *envy* in Russian and English in comparison with the concept *závist* in the Slovak language. In particular, in the notional part of Russian concept *envy* the meaning “a sense of anger directed at the object of envy” is added that can be seen in the following examples:

Затем все исчезло, и души юнкеров наполнились завистью, злобой и тревогой.

– У... с-с-волочь!.. – проныло где-то у стрелки, и на теплушки налетела жгучая вьюга. [Then everything disappeared, and the junkers souls were filled with envy, anger and anxiety. – Ugh ... bastard!.. – The wind sang somewhere near the spit and the snowstorm swooped down upon the vans].

Живут жадностью, живут завистью. Все рады зло сделать. [They are greedy and envy. Everybody is glad to do evil].

The analysis of the metaphorical and figurative part of the concept on the material of literary, poetry and journalistic texts suggests that in Russian, English and Slovak texts anthropomorphic and color metaphors are widely presented. In Russian linguistic culture *envy* is *white, pale and black*, in English - *black, green and pale*, in Slovak - *black, pale, green and gray*. Here are only a few examples to illustrate this statement:

Но вас хвалить никто не смеет, –/ Пред вами нищий – наш язык: / Отважный юноша робеет, / И зависть тайная бледнеет, / И изумляется старик [But no one can praise you, – / The language is poor: / The Brave young man is timid, / And envy secretly turns pale, / and the old man is amazed] (А. Фет. Л. И. Офросимовой); *И зависть бледная, усилившись, синела, / Которая в устах его всегда сидела* [And pale envy growing and becoming blue, / Was always in his mouth,] (Я. Княжнин. Бой стихотворцев. Песнь первая); *Вас-ли черная зависть клянет* [Does black envy curse you].

There cannot be those numberless offenses / “Gainst me, that I cannot take peace with; no black envy / Shall make my grave. Commend me to his Grace”.

Aj Fidel Castro so svojou už kultovou džogingovou súpravou by zbledol od závišti! [Even Fidel Castro has turned pale with envy!] (<http://noveslovo.sk/node/4437>).

Harmful malicious feeling of envy is compared with illness, disability, or their source – a poison, an infection in three studied languages:

Кто завистью не болен? Кто участью своей доволен? [Who is not sick with envy? Who is happy with his fate?] (С. Аксаков. Роза и пчела).

Even so was it that into the gall of envy (H. Melville. Billy Budd).

Absurditou závisť je, že reakciou je bolesť na bolesť [Envy is absurd, the response to pain] (<http://baina.eu/index.php/blog/vladimir-cervenak/211-zavist>).

Envy causes heartache, nibbles, rankles, gnaws, bites, stings, hurts, wounds and bothers:

Затем, что зависть жжет его, как ржа. [Then, that envy burns him like rust]. (И. Северянин. Медальоны); *Куру грызла зависть.* [Envy gnawed Kira]. (Д. Донцова. Доллары царя Гороха).

"Sure, it's swell for you," returned Clyde, burning with envy and disappointment. (T. Dreiser. An American Tragedy); *The boys were all eaten up with envy...* (M. Twain. The Adventures of Tom Sawyer).

"Je to talent," nelútostne vydýchla Vieročka. Ó, nenávisť. Čierna závisť ťa rozpaľuje. Pochybnosti. A strach. Hrozné ["It's a talent," whispered Verocka fiercely. Oh, hate. Black envy was hurting. Doubt. Fear. Horror].

The contextual analysis enables us to understand the difference in the perception and language representation of emotional concepts in different linguistic cultures.

Stage 4

Free associative experiment. Free associative experiment involved the Russian-speaking and foreign respondents (Slovaks) in a total amount of 100 people aged from 18 to 55 years old, male and female, teachers, undergraduate and graduate students.

When processing the survey results the authors applied the methods of cognitive generalization of the results to formulate the features revealed by certain meanings or by semantic components of language units. As a result of data processing it was found that envy for all respondents is mainly a negative phenomenon and is associated with *evil* (40%), *black colour* (31.2%), *friend* (6.4%), *bad feeling* (6.3 %), *greed* (2.3%), and *hate* (2%). Unlike the respondents from Slovakia some Russian-speaking respondents (12.4%) say that envy can be *white*, (meaning "innocent envy"). In Slovak the word envy generally carries a negative connotation and it did stem from a puritanical culture, so that may be a reason they do not dilute the meaning of the word. The envier in the imagination of Russian respondents is *a man* (26.7%), *a hypocrite* (23.3%), *bad* (23.3%), *ill-will* (13.3%), *wicked* (8.8%) ,*a loser* (6.2%); in the view of respondents from Slovakia - *a woman* (40%), *unkind* (24.3%), *wicked* (22.5%). 50% of Russian respondents believe that the differences between male and female envy does not exist. However, the respondents from Slovakia (80%) believe that there are differences between male and female envy in what and how they envy. The processing of the survey results also showed that the Russian-speaking respondents together with

the respondents from Slovakia on the right side of 30 find it difficult to answer the question about the literature characters with whom they associate envy. Nevertheless, for Russians it is *ткачиха, повариха* and *сватья баба Бабариха* (weaver, lady-cook) from "The Tale of Tsar Saltan" by Pushkin, *мачеха* (the stepmother) from "Cinderella" and for Slovaks, and it is interesting to note, – *Marfushka* from the Russian movie "Morozko".

Conclusion

The importance of cross-cultural study of emotional concepts is of paramount importance in current cognitive and anthropological linguistics research. In this context, it becomes imperative to create awareness on universality and cultural specificities in the conceptualization of emotions when members of different cultures express their emotional state according to their specific cultural rules to minimize the risks of misinterpretation and misconception.

The procedure of comparative conceptual analysis opens wide horizons for researchers to determine the verbalization specifics of a mental construct in different linguistic cultural conditions and provides scholars and practitioners with an opportunity to revisit some analyses to study the impact the emotions and discursive strategies have on communication, policy and perception.

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Abbreviations

CEDEL – *A Concise etymological dictionary of the English language* (Skeat, 1963).

Eng. – English

HSSJ – *Historický slovník slovenského jazyka* (Majtán, Kuchar, Skladaná, 2008).

ME – Middle English

ML – Medieval Latin

ODP – *The Oxford Dictionary of Proverbs* (Speakes, 2008).

OF – Old French

OR – Old Russian

PASFZ – *Prekladový anglicko-slovenský frazeologický slovník* (Kvetko, 2014).

Rus. - Russian

SAFS – *Slovensko-anglický frazeologický slovník* (Fronek & Mokrání, 2003).

Slov. – Slovak

SSJ – *Slovník slovenského jazyka V.* (Peciar, 1965).

SSS – *Synonymický slovník slovenčiny* (Pisárčiková, 2004).

WCCLP – Web Corpora & Corpus Linguistics Portal (online)

WDP – *The Wordsworth Dictionary of Proverbs* (Apperson, 2006).

ZFDL – *Zlatý Fond digitalizovaných literárnych diel* (online)

The Word Class Adjective in English Business Magazines Online

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Abstract

The aim of this paper is to research the word class adjective in one sequence of the ESP: Business English, more precisely English business magazines online. It is an empirical study on the corpus taken from a variety of business magazines online. The empirical analysis allows a comprehensive insight into the word class adjective in this variety of Business English and makes its contribution to English syntax, semantics and word formation. The syntactic part analyses the adjective position in the sentence. The semantic part of the study identifies the most common adjectives that appear in English business magazines online. Most of the analysis is devoted to the word formation of the adjectives found in the corpus. The corpus is analysed in such a way that it enables its division into compounds, derivatives and conversions. The results obtained in this way will give a comprehensive picture of the word class adjective in this type of Business English and can act as a starting point for further research of the word class adjective.

Keywords: word class adjective, ESP, business magazines online, syntax, semantics, word formation

1 Introduction

The concepts and applications of modern linguistic practice are rooted in studying, establishing and defining boundaries between specific word classes, resting on the criteria applicable to all word classes among which the third largest comprising adjectives is of unquestionable importance. Adjectives in the English language form a very large, open class (Payne et. al., 2010, p. 29), and according to the Oxford English Dictionary's crude estimate they account for about 25% of the total number of words included in the dictionary. In COCA corpus they compose 17% of the most frequent words (Kartal, 2017, p. 5). The proportion, obviously, varies according to different sources, but it can be concluded that this is a very productive class with a large part of new lexemes due to constant language change, as well as contemporary communication needs

and challenges, especially present in the domain of global business. Adjectives belong to the category of 'feature words' (Zerkina et al., 2017, p. 5149), and are also referred to as 'describing words' as they describe, restrict, modify, qualify or point out the living being or lifeless thing designated by the noun or pronoun (Curme, 2011, p. 18). This can be supported by Marza saying that "adjectives are probably the most prototypical way to express the qualification of a noun" (2011, p. 100). This word class is comprehensively described by linguists, and it is quite demanding to find a concise definition of it without considering their morphological, syntactic and semantic characteristics.

In this paper we provide general information about the nature of word class adjective on the basis of an examination of examples of relevant usage, taking into account the frequency of the adjectives in the corpus of English business magazines online. We believe that this information will be of value to anyone teaching word formation across the curriculum with focus on the words specific to the business discipline, and that it may help increase Business English students' awareness of adjective usage in the register, as well as their vocabulary knowledge and the correct use of adjectives.

2 Theoretical framework

In modern linguistic practice and domain of linguistic expressions word classes or lexical categories, though seemingly an ordinary aspect of language, play a key role. However, taken both universally and specifically in the syntax, semantics and morphology of the English language itself, and due to morphosyntactic and semantic properties of words, boundaries between them are vague. Hence, differentiating them can be as difficult as defining words and determining their internal organization, relationships and constituent parts. As a direct consequence of language change over time contemporary word-formation processes represent important concepts as they create new lexemes which come into being in a language and enlarge the vocabulary (Tahaine, 2012, p. 1107).

Contemporary use of the English language in different sociolinguistic contexts evolves and changes constantly through emergence, usage and meaning of new words in today's contexts thereby contributing to its richness. The importance of vocabulary studying has been an area of key importance for linguists since language emergence, and is central to any language teaching and learning as it addresses all the words in a language which Lewis refers to as "the core or heart of language" (in TESOL, 1993, p. 2). Considering the fact that words are fundamental units each language consists of and which are needed for communication, their differentiation on the level of grammar or subdivision into sets of words or syntactic classes is of key importance to understanding the complexity of English vocabulary, and it results in syntactic categories (Plag,

2002, p. 9), word classes or traditionally called parts of speech with common morphological and syntactic properties (Dixon, 2005, p. 7).

The importance of word classes is of major linguistic interest, and according to Polinsky (2004, p. 1) their distinction has long attracted researchers of language. Additionally, they are also central to corpus linguistics. The classification depends on different criteria and its heterogeneity is based on unequal morphological, syntactic, semantic and phonetic properties of words i.e. criteria applied in the classification. Despite the fact that linguists often disagree on the overall number of such categories (Buljan and Gradečak-Erdeljić, 2013, p. 9), grammatical description of words adapted by most English dictionaries classifies them into 10 traditional categories (Rijkhof, 2007, p. 1). Despite the fact that the boundaries between them are not definitely fixed and can be determined differently, there are four major word classes in English that include four lexical categories – nouns, verbs, adjectives and adverbs, or according to Dixon (2005, p. 8), who excludes adverbs, three major word classes.

The major grammatical feature of word classes and a distinction that can be drawn among them is their division into two broad supercategories which include membership to either closed class or open class type, whereby the four major word classes belong to the open word class. In the major word classes new lexemes arise for communicative reasons, and they are continually being increased or updated by new words which are either coined or borrowed from other languages. This is accomplished, according to Buljan and Gradečak-Erdeljić (2013, p. 19), by "combining morphemes to form new lexemes." Word formation, in particular, enables the openness and contributes to the flexibility and elasticity of the language system and the respective corpora making the open class words extremely large in number. According to Rajarajeswari and Mohana (2013, p. 6) new words are "called forth by a need for it or a consciousness that no existing word is really adequate to fill that need". To conclude with, introduction of numerous new words into a language and enlargement of the vocabulary is, among other things, a result of social, political and, nowadays especially, business developments, since a globalized marketplace and need for intercultural competences impose a constant demand for new lexemes to be created and used in order to describe new real world phenomena.

3 Adjectives as a word class

In any of the world's numerous languages, adjectives represent one of the four dominant word classes, each composed of thousands of members, and in English they compose the third most common type of open word classes after nouns and verbs (Leech in Kartal, 2017, p. 6). In other words, the estimated total number of words in English is more than a million, and *the Oxford English Dictionary* mentions 171,476 words in current use and around 9,500 derivative

words included as full entries or subentries respectively, one quarter of which are adjectives. The extent of grammatical differentiation between them, as well as the previously mentioned major classes, may show a considerable amount of variation, as Payne et. al. explain (2010, p. 29). So, the attempt to describe the nature of adjectives considers different criteria, and crucial for establishing them as a separate word class are their semantic, syntactic and morphological characteristics.

Despite having the same degree of importance as the other content words, adjectives have not been paid adequate attention. However, grammatically and semantically, they have the same degree of importance as the other content words in the linguistic code and their importance is unquestionable, especially in certain types of discourse (Marzá, 2011, p. 100; Tomuro, Kanzaki & Isahara, 2007, p. 1). Moreover, in terms of function, their prominent role in the English language is based on the fact that they are "responsible for classifying events or entities or describing their qualities" (ibid.), which is why they are referred to as 'describing words'. They, accordingly, answer the following questions in English: *Which one?*, *What kind (of)?*, *How many / much?* and *Whose?*, and denote a quality or property attributed to a noun, i.e. of the thing named, specify or narrow down what the noun refers to and specify it by creating description and detail. According to Marza (2011, p. 100), adjectives are the most frequently used and important tool for evaluating a sentence, which "can account for merely objective or more subjective features and as such they can reveal much of the speaker's/writer's attitude towards the textual content." They can express physical and other qualities, writer's opinion or attitude, origin, place, frequency, degree, necessity and degrees of certainty (Eastwood, 1994, p. 259) adding auxiliary information to the nouns and enabling therewith elaborate communication with attitude and character.

There is an extensive literature on adjectives, and according to Marza (2011, p. 100ff.) "the literature on adjective categorisation is vast and varied, since adjectives have been classified in a multiplicity of ways depending on the criteria adopted... based on morphological, functional, syntactic, pragmatic or semantic criteria or even based on a combination of some of these", and among which syntactic and semantic classification stand out. In terms of syntactic criteria, adjectival functions, and thereby their most common positions, are determined by the fact that they can be found in close proximity to nouns and essentially function as noun modifiers or rarely pronoun modifiers. Though in English there is a large overlap between the items in terms of their function, i.e. occurrence (Payne et. al., 2010, p. 30), their central features related to syntactic functions are threefold: the ability to function attributively, predicatively and postpositively (Greenbaum & Quirk, 1995, p. 129ff.). In attributive position, the adjective precedes or premodifies the noun composing together a noun phrase, whereas

in predicative position, it follows the noun as the complement of a copula verb, a referring verb, or a verb indicating a change of state, and functions as subject complement to noun phrases, finite clauses and nonfinite clauses, or as object complement. In their third position or postposition, adjectives in a noun phrase follow the noun or pronoun they modify immediately, and these adjectives can be regarded as reduced relative clauses. Finally, adjectives can function as a modifier of an indefinite pronoun following the pronoun.

Another important feature of adjectives is gradability – they can describe different amounts or degrees or qualities that can vary allowing comparison or grading. They, therefore, take comparative and superlative forms, either by means of inflections (-*er* for comparative and -*est* for superlative), or via quantification or addition of the premodifiers *more* and *most*. However, the adjectives that describe the qualities that do not vary can not be changed. Greenbaum and Quirk add the premodification by the intensifier *very* as one of adjectival features (ibid.). Also, adjectives do not take plural inflections or endings for gender, do not have verbal or nominal properties, and in rare contexts, they can be used as the noun.

In summary, in accordance with their basic features given above, adjectives can:

1. Premodify a noun, i.e. occur in attributive position: *a social survey, useful fact*
2. Follow the noun as the complement of a copula verb, i.e. occur in predicative position: *it sounds interesting, the information is useful*
3. Immediately follow the noun/pronoun they modify, i.e. occur in postpositive position: *the CEO responsible, something exciting*
4. Be graded: *busy – busier – the busiest, exciting – more exciting – the most exciting*.

In line with the above mentioned features, an elementary classification of adjectives is their distinction based on prototypicality whereby they can be 'central' or 'peripheral' (Quirk et al., 1972; Huddleston, 1984; Biber et al., 1999 in Marza, 2011). Central or prototypical ones have all the basic features, whereas the ones which do not and which can be either attributive or predicative are referred to as peripheral or non-central. Additionally, following mainly syntactic criteria, adjectives can be named using the terms *descriptive* and *limiting*. According to Curme (1965: 18) descriptive adjectives "express either the kind or condition or state of the living being or lifeless thing spoken of", and the author considers them to be so simple in nature that they do not form classes. They can furtherly be subdivided into two categories: *qualifying*, which express perceived qualities and *classifying*, which express permanent qualities of a noun.

As for the semantic categorization of adjectives, different authors taxonomize different classes (Lee, 1994; Hundsnerscher & Splett, 1982, ibid.). However, on the basis of their semantic features, the most representative taxonomy was given

by Dixon (2005, p. 84 ff.) who distinguishes 11 categories, which include: dimension, physical property, speed, age, colour, value, difficulty, volition, similarity, qualification and human propensity, the last two categories with a number of subtypes each. Despite the fact that other categorizations and functions of adjectives, or even their combinations, are also possible, the very notion that different authors rely on different criteria shows the diversity of possible approaches. However, we believe that no aspect is to be prioritized over the others, and a comprehensive approach to the word class would require the consideration of all the mentioned criteria.

Like other word classes adjectives can undergo word formation processes to create new lexicon, and apart from monomorphemic or simple adjectival lexemes (simplex adjectives), there are two basic types of word-formation in the English language and these include word-composition and word-derivation, or according to Cume (1965, p. 19):

- a) Compound adjectives
- b) Derivative adjectives.

Consequently, the vast majority of the vocabulary comprising the word class adjective is composed of compounds, derivatives or conversions. Considering the fact that word-composition is formation of new words by combining two or more stems which occur as free forms, compound adjectives (sometimes called compound modifiers or phrasal adjectives) are single adjectives containing two or more words operating together and modifying the same noun. As they are very often linked together with a hyphen or hyphens, they are sometimes referred to as hyphenated adjectives. Compounds are very common in English (Tahaine, 2012, p. 1109), which can be supported by Cume (1965, p. 19) claiming that the modern adjectives in English have acquired a great facility to form compounds, and multiple words in different combinations contained in them function in a sentence as a separate lexical unit. The basic part of the compound (*determinatum*), which expresses a general meaning, is preceded by the determining one (*determinant*), which changes the modification by the basic part. According to the Longman grammar of spoken and written English (1999, p. 533f.), adjectival compounds can consist of:

1. Adverb + adjective: *politically-independent, critically-ill*
2. Adverb + *ed*-participle: *carefully-planned, well-organised*
3. Adverb + *ing*-participle: *constantly-changing, free-spending*
4. Reduplicative: *super-duper, easy-peasy*
5. Adjective + colour adjective: *dark-blue, grey-white*
6. Adjective + other adjective: *sectoral-zonal, infinite-dimensional*
7. Adjective + *ed*-participle: *ready-made, soft-textured*
8. Adjective + *ing*-participle: *biggest-selling, good-looking*

9. Noun + adjective: *iron-rich, life-long*
10. Noun + *ed*-participle: *poverty-stricken, US-oriented*
11. Noun + *ing*-participle: *confidence-boosting, law-abiding*
12. Adjective + noun: *big-name, large-scale*
13. Participle + adverbial particle: *boarded-up, paid-up*

As explained by Cume (1965, p. 19): "Similar to compound adjectives are derivative adjectives, i.e. adjectives formed by adding to a noun, an adjective, or a verbal stem a suffix, which in most cases was originally an independent word." Generally speaking, derivatives result from the most common word formation process called derivation or affixation, which is, according to Tahaineh (2012, p. 1108), achieved by means of a large number of small bits called affixes (prefixes and suffixes) which make a whole new word out of the word it attaches to, change the basic meaning of the word or the word class. Additionally, Urdogan (as cited in Dehham, 2016, p. 16) claims that "adjectival affixes are bound morphemes which, in contrast with free morphemes, cannot normally stand alone, but are typically attached to other forms."

The following affixes can be used to form adjectives:

1. Prefixes are morphemes added to the beginning of an adjective to form a new one, generally without altering the word class. However, the meaning changes, and the prefixes can express either negative or opposite meaning, or relations of time, place and manner: *a-, ab-, anti-, counter-, de-, dis-, hyper-, il-, im-, in-, inter-, ir-, micro-, mis-, mono-, neo-, non-, over-, pan-, post-, pre-, pro-, re-, sub-, self-, trans-, un-, under-*. Distinction needs to be made between prefixes of typically English and foreign origin, mostly Latin (*de-, dis-, non-, post-, pre-, re-, sub- and trans-*) and Greek (*a-, anti-, auto-, hyper-, micro, mono-, neo- and pan-*). Some adjectives can have two forms but retain the same meaning (*non-scientific / unscientific*), whereas in some cases distinction must be made in meaning (*unused vs. misused*). Most adjectives formed with prefixes are written as one word, and sometimes a hyphen is used with prefix *non-*.

2. Suffixes are morphemes added at the end of an adjective, and some common ones in the English language include: *-able/-ible, -al/-ial/-tial, -ant/-ent, -ar/ary, -ate/-ete, -en, -esque, -ful, -ic/-ical, -ish, -ive/-ative, -less, -ly, -ous/-eous/-ious/, -ory, -some, -y*. Depending on the word class they are derived from and typical suffixes, derivative adjectives can be grouped into the following subcategories:

- a) Deverbal adjectives (V→A): *-able/-ible, -ent, -ive*
employable, respondent, communicative
- b) Denominal adjectives (N→A): *-al, -less, -ful, -ous, -able, -ish, -y, -an, -ar:*
economical, ambiguous, German
- c) Deadjectival adjectives (A→A): *-some, -ish, weakly, threesome, greenish*

In case where derivational morphological processing is not distinctly marked, i.e. when the lexeme is not linked with an affix, the so-called zero derivation or functional shift takes place, which is also referred to using a distinct term – conversion. Therewith, according to Quirk (in Hernández & Mendiluce Cabrera, 2005) the process is like deriving or transferring a word into another morphological category with a zero-affix creating a semantic dependence of one word upon another. This is a productive and easy way to create new words, in our case adjectives, by which the adjectival lexeme is converted to other open-form class. Especially common are de-adjectival verbs which for instance get the meaning of "to make (adjective)" like in *to black out*, *to open*, *to slow*. Another case is with 'partial conversion', i.e. conversions from noun to adjective and vice versa, which is considered rather controversial (ibid.), and it implies a process happening when "a word of one class appears in a function which is characteristic of another word class" (Quirk in Hernández & Mendiluce Cabrera, 2005). In most cases this is not to be understood as conversion but as an example of nominalization (*Chinese*), or adjectivization (*favorite*).

4 Method and hypotheses

This paper is the result of the scientific research in one segment of English applied linguistics. It represents a corpus-based approach and analyses the real language in the segment of English business magazines online. The cardinal importance of the corpus-based research lies in its ability to mirror the language phenomena in a completely objective way. The obtained results are in the case of corpus-based research scientifically proved and relevant, since they enable precise insights into the part of language in question. The corpus consists of the newspaper articles taken from the following business magazines online: *Entrepreneur*, *Forbes*, *Fortune* and *TheStreet*. The corpus containing 667 corpus findings builds a good foundation for the analysis of the word class adjective in this register of ESP. At the beginning of our research we formulated the following hypotheses:

1. There are more than 80% of attributive adjectives in the corpus when it comes to the syntactical position of the adjectives in corpus. We hypothesize this because there is a need in the register of Business English to describe processes and states.
2. Adjectives from the corpus tend to semantically belong to the Business English variety of ESP. We presuppose that the most frequent adjectives in this variety of ESP do not correspond to the most common ones in general English.
3. The most common derivational suffixes in the corpus of English business magazines online are: *-al*, *-ent*, *-ive*. We formulated this hypothesis according to the corpus findings from Longman grammar of spoken and written English

(1999, p. 531), which confirms the frequency of these suffixes in this order. We do not expect to get different frequency results in our research.

4. The frequency of comparative and superlative forms of adjectives is higher compared with the one in the register of academic writing. Although there is a high frequency of these forms in the mentioned corpus, we assume that the frequency of these forms in the corpus of English business magazines online is even higher due to the increased need to express gradation in Business English.

5 Research and discussion

A total of 410 sentences comprised the corpus containing 7.679 words, what makes 18.7 words a sentence. There are 667 adjectives in the corpus and 8.7% of the words in the corpus belong to the word class adjective. If we take into account the information in OED, which states that there are about 25% of adjectives in English vocabulary, the frequency of this word class in this register of ESP is much reduced.

The syntactical part of the analysis represents the analysis of the adjective position in the sentence. It showed the following results:

Tab. 1: Adjectives in the English business magazines online according to their position

Adjective position	Number of corpus findings	Percentage (%)
Attributive	559	83.8
Predicative	91	13.6
Postposed	17	2.6
Totally	667	100

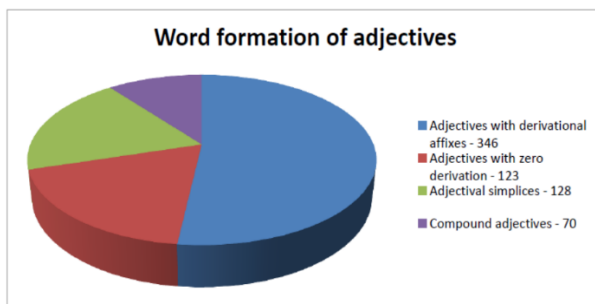
The obtained results confirm our first hypothesis in which we put forward that the number of attributively used adjectives make out more than 80% of the adjectives in the corpus.

According to the same source (OED) these are the most common English adjectives: *good, new, first, last, long, great, little, own, other, old, right, big, high, different, small, large, next, early, young, important, few, public, bad, same, able*. The following table shows the most frequent adjectives in the corpus of English business magazines online:

Tab.2: The most frequent adjectives in the English business magazines online

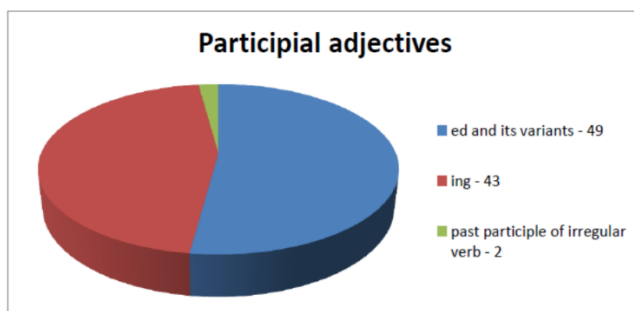
Adjective	Number of corpus findings
financial	18
new	12
same, small	9
Chinese, major, willing	8
average	7
high, large, next , retained, simple	6
easy, free, great, last, little , real, strong	5
best, competitive, former, hard, long-term, north, successful, total, wealth-building, worth	4
American, annual, big, domestic, extra, favourable, last, mutual, own, past, patient, stock-screening, wrong	3
branded, Buffett-based, exclusive, future, commercial, compound, difficult, emerging-markets, full-year, international, low, negative, past, personal, popular, positive, public, realistic, serious, short-term, solid, spending, 10-year, upscale, wealthy, winning	2

The above shown results confirm our second hypothesis that adjectives from the corpus tend to semantically belong to the Business English variety of ESP. In contrast to the allegations from OED there are only nine adjectives which are the same among the most common 25: *great, high, large, last, little, new, next, same, small*. The following among the most frequent adjectives can be semantically related to Business English variety of ESP: *annual, average, branded, Buffett-based, commercial, competitive, domestic, emerging-markets, financial, long-term, major, short-term, spending, stock-screening, 10-year, upscale, wealth-building, wealthy, worth*. The great majority of the most frequent adjectives are adjective simplices and adjectives with derivational suffixes. Apart from these frequent adjectives, there are many adjectives that occur in the corpus only once, but are strongly semantically related to the Business English variety of ESP: *compounding, economic, financing, fiscal, lending, lucrative, marketed, rental, taxable*. There are many compound adjectives strongly related to the Business English variety of ESP in the corpus, such as: *brand-damaging, Buffett-inspired, Buffett-like, Chinese-traded, debt-free, exchange-traded, high-scoring, lower-return, more-expensive, multi-billion, no-name, Peter Lynch-based, smaller-scale, state-chartered, two-income*.



Graph 1. Word formation of adjectives in English business magazines online

When it comes to word-formation-related patterns of the adjectives in the corpus, the results presented in Graph 1. show that the most frequent type of adjectives belongs to the adjectives with derivational affixes (51.8%), followed by adjectival simplices (19.2%), adjectives with zero derivation (18.4%) and compound adjectives (10.6%). The most common adjectives with derivational affixes are: *financial, Chinese, easy, competitive, successful, total, American, annual, domestic, favourable*. The most common adjective simplices are: *new, same, small, high, large, next, simple, free, great, last, little, real, strong*. The most common adjectives with zero derivation are: *willing, major, average, retained, north, own, spending, winning*. The most common compound adjectives in the corpus are: *long-term, wealth-building, stock-screening, Buffett-based, emerging-markets, full-year, short-term, 10-year*. Adjectives in the corpus with zero derivation are derived from the following word classes: nouns (25 adjectives), adverb (1 adjective) and the majority of such adjectives are derived from verbs and occur in the form of participial adjectives:



Graph 2. Participial adjectives in English business magazines online

g2

There are 94 participial adjectives in the analysed corpus. The most frequent are the past participle forms of the regular verbs, such as: *flavored, focused, inspired, retained* (52%). In the second place, there are 43 participial forms ending in *-ing*, such as: *looming, rising, spending, staggering* (46%). Finally, there are two past participles of irregular verbs with passive meaning: *driven, lost* (less than 2%).

Tab. 3: Frequency of derivational suffixes in English business magazines online

Adjectival suffix	Number of corpus findings
-al / -ial	72
-ive	27
-y	20
-able / -ible	17
-ent	14
-ic	11
-ical	10
-ous/-eous/-ious	10
-ful	6
-less	3
-ate	3
-ish	1

Other derivational suffixes were not found in the corpus. The above given results do not confirm our third hypothesis, in which it was proposed, that the most frequent derivational suffixes in the corpus of English business magazines online were: *-al, -ive, -ent*. According to the results obtained from the corpus, the English business magazines online do not use much prefixation in its word formation – there are only 11 corpus findings with prefixes *auto-, im-, in-, inter-, micro-, non-, un-*: *autoimmune, immediate, inevitable, intangible, international, microscopic, non-addictive, undying, unattainable, unexciting, unproven*.

There are 70 compound adjectives in the corpus. They can be divided into the following groups according to their composition:

It is important to point out that there are several compound-word patterns that do not occur in the corpus, such as reduplicatives (*teensy weensy, okey-dokey*), adjective + ing-participles (*good-looking, long-lasting*), participle + adverbial particles (*blown-out, left-over*).

Tab. 4: Compound adjectives according to their composition

Compound composition	Number of corpus findings	Examples
adverb + adjective	1	more-expensive
adverb + ed-participle (past participle)	2	well-advised, well-known
adverb + ing-participle	4	all-encompassing, hard-working, high-scoring
adjective + colour adjective	1	all-white
adjective + adjective	1	second-biggest
adjective + ed-participle (past participle)	2	newfound, tight-packed
noun + adjective	9	Buffett-like, debt-free, energy-efficient
noun + ed-participle (past participle)	10	Buffett-inspired, Chinese-traded, self-made
noun + ing-participle	11	award-winning, brand-damaging, wealth-building
adjective + noun	22	full-year, long-time, lower-return

There are seven multi-word adjectives in the corpus too: *all-in-one*, *build-on-request*, *lower-cost-of-living*, *once-red-hot*, *one-size-fits-all*, *subtle-yet-keen*, *up-and-coming*.

Tab. 5: Adjectives according to their grade of comparison

Grade of comparison	Number of corpus findings	Percentage (%)
Positive	619	92.8
Comparative	28	4.2
Superlative	20	3

The greatest number of adjectives in our corpus are in the positive degree. The following adjectives from the corpus appear in the comparative, i.e. the superlative degree: *better* (x2), *cheaper*, *earlier*, *more elongated*, *more-expensive*, *faster*, *hotter*, *larger* (x3), *later*, *lower* (x3), *lower-cost-of-living*, *lower-return*, *narrower*, *more powerful*, *more realistic*, *second-biggest*, *smaller* (x2), *smarter*, *stronger*, *trickier*, *weaker*, *younger*; *the best* (x2), *the biggest* (x6), *the greatest*, *the*

hardest, the largest (x2), the latest, the nearest, the most prominent, the simplest, the smallest, the youngest, the wealthiest, the worst. Our fourth hypothesis predicted that the frequency of comparative and superlative forms is higher than the one in the register of academic writing. Longman grammar of spoken and written English (1999, p. 524) quotes the following frequency of adjectives: comparative – 3200 corpus findings per million words (0.32%) and superlative – 800 corpus findings per million words (0.08%). Our corpus contains 28 comparatives on 7679 words (0.36%) and 20 superlatives (0.26%). It means that our fourth hypothesis proved to be true due to the considerable need to express gradation and mutual ratios between various categories in Business English.

6 Concluding remarks

This paper presents the results of detailed research of the word class adjective in English business magazines online. The empirical research was carried out on texts chosen from four business magazines online: *Entrepreneur*, *Forbes*, *Fortune* and *TheStreet*. There are 667 corpus findings, the number that enables a comprehensive linguistic analysis. At the beginning of the research we put forward four hypotheses:

1. There are more than 80% of attributive adjectives in the corpus when it comes to the syntactical position of the adjectives in the corpus. The hypothesis was confirmed with 83.8% of attributively used adjectives in the corpus.

2. Adjectives from the corpus tend to semantically belong to the Business English variety of ESP. This hypothesis was confirmed out of two reasons: Firstly, the most common adjectives from the corpus from English business magazines online only partly overlap with those from general English, as presented in the Oxford English Dictionary. Secondly, there are numerous semantically Business-English-related lexemes in the corpus, which additionally confirm the second hypothesis.

3. The most common derivational suffixes in the corpus of English business magazines online are: *-al*, *-ent*, *-ive*. This hypothesis was not confirmed. The most common derivational suffixes in English business magazines online are: *-al* / *-ial*, *-ive*, *-y*.

4. The frequency of comparative and superlative forms of adjectives is higher compared with the one in the register of academic writing. We put it forward since we believe there is a high frequency of these forms in the corpus of English business magazines online due to the strong need to express gradation and mutual ratios between various categories in Business English. The hypothesis was confirmed, as can be seen from the results shown below:

Tab. 6: Frequency of comparatives and superlatives in the corpora of academic writing and English business magazines online

Grade of comparison	Corpus of academic writing (occurrences per million words)	Percent	Corpus of English business magazine online (occurrences per million words)	Percent
Comparative	3200	0,32	3600	0,36
Superlative	800	0,08	2600	0,26

The results acquired indicate further possibilities of scientific research into various aspects of word class adjective in Business English, as well as the possibility of comparative analysis of the obtained results with other registers of ESP.

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The involvement of neuro-linguistics and mind mapping in the development of a holistic perception of language education

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Abstract

The majority of people who have experienced institutionalized education have found it extremely laborious, slow and a necessarily repetitive process. The authors of this paper focus on and present possibilities for making the teaching of a foreign language more effective through mind mapping: the implementation of neuro-linguistic knowledge and mind maps into the learning process.

Key words: neuro-linguistics, mind mapping, coding, learning strategies, keyword, concept.

Introduction

As Petty (2006, p. 27) has it: “the aim of the brain is to remember only useful facts and thoughts, but, unfortunately, it has the tendency to consider the information as long lasting and useful only if it is applied regularly”.

This could be taken as one of the most important reasons why, after their school attendance, only very few learners can acquire and use a foreign language. Teachers most often tell learners that the words are combined in different types of sentences. Subsequently, the sentences are arranged in such way that it is possible to interpret ideas, opinions and thoughts. It is a great disadvantage that teachers do not teach learners how to apply all of the acquired knowledge. They do not explain how different pieces of information could be interconnected with one another in branched semantic networks.

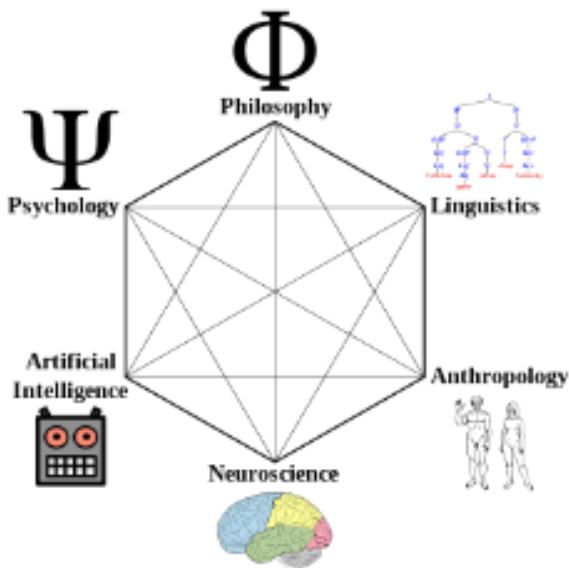
For a deep understanding of a foreign language it is important that learners understand implicit knowledge of its structure, that they know the meaning of individual words and sentences in order to be able to decode their meaning in spoken utterance as well as to interpret the meaningful relationships between individual concepts. It is necessary to show learners how they can process and decode the information they use either in spoken or written language.

1 Neuro-linguistics and metacognitive regulation

Neuro-linguistics explains the relationships between brain and language structures, i.e. the way that the linguistic system operates in human brain (localization and activation of language representations in human brain as the language is an abstract matter of the mind concept; moreover, language areas of the brain are specialized – especially for individual representations of symbolic communication).

Neuro-linguistics, as a discipline on the border between humanities and natural sciences, belongs to cognitive sciences. Cognitive science deals with the issues of cognition, memory and perception, information processing, problem solving, evaluation, planning, mental operations. The connection between individual disciplines (Philosophy, Linguistics, Anthropology, Neuroscience, Artificial Intelligence, Psychology) is shown in the heptagram of cognitive science below Figure 1.

Fig. 1: Heptagram of Cognitive Science (Miller, 2003)



In several recent decades there has been almost a cognitive revolution in educational contexts. Miller (2003) depicts a historical view of gradual changes in psychology that brought today's cognitive revolution. The origin of cognitive science dates back to September 11, 1956 which was the second day after the symposium organized by the Massachusetts Institute of Technology.

Nowadays cognitive sciences are viewed as a stream of the most dynamically developing scientific disciplines. The main role of cognitive science is considered to be the demystification of the functions, reflection and nature of human mind. It is primarily about mental states such as attention, emotion, memory, perception and thinking, but also includes the latest knowledge in cognitive research in relation to language, brain, consciousness, behaviour, and the mind.

In cognitive science, researchers constantly try to find answers to the questions: How do we learn? How do we remember? How is perception organized? Why can we solve problems? How do we interpret reality? How does our brain get information?

Neuro-linguistic coding is a concept that has been developing since the 1970s. It is based on an alternative psychotherapeutic method known as NLP founded by the linguist Grinder and mathematician Bandler (1981). These authors modelled the thinking patterns of successfully learning experts from various fields, and applied them into solving common problems in standard life situations. The aim of neuro-linguistic coding is to increase learning efficiency, to improve the work performance and creative potential of every person.

The concept of neurolingual coding is based on the fact that success in any educational pursuit could be achieved through active application of three basic components in learning processes:

- neurological – our brain, the nervous system and the senses through which we receive information from the outside world;
- linguistic – communication, language;
- coding – a summary of procedures which make it possible to create a stable internal knowledge structure for each human.

Neuro-linguistic coding can be defined as an effective model of thinking. Basically it is about working with metastrategies of learning, so that we think about thinking. Its foundation lies in the removal of isolated information and the storage of information in the human brain by transcoding of individual knowledge into an easy memorable form. Metacognitive learning strategies are marked as processes in which the subject reflects upon his or her own cognitive processes, plans and controls them (Foltynová, 2009).

The strategies PQRST, SQ4R, MURDER and the method of using a cognitive activity pattern are the usual choices within the educational process. By practicing and applying metacognitive strategies learners become good readers able to work with any text for any subject.

Understanding according to Gavora and Zápotočná (2003) is the formation of hierarchical relations between text elements (at the level of words, sentences), in other cases extra-textual factors that represent the relations between them are considered. The differentiation of multiple layers of understanding is a prerequisite for considering a shift to the next level, part of the superstructure

above understanding known as metaunderstanding (Magulová & Zápotočná, 2007).

Several studies have confirmed that it is easier for children to use metacognitive strategies while learning foreign languages. This is so especially in less demanding tasks when they have sufficient learning capacity because they can then use the learning strategies correctly and thus explain their usefulness in learning.

Unfortunately, in our schools there has always been less time than necessary for the development of learners' metacognition in foreign language learning process. This is related (among other factors) to an overdesigned school curriculum. The work with metacognitive strategies for learners' thinking is still not a common part of learning and teaching.

Metacognition cannot be understood as a general concept, but rather as a term which can be developed in each subject. The development and support of metacognition can contribute to an improved quality of education.

2 Mind mapping

A countless number of theories and research findings indicate that the vocabulary in a foreign language is an indispensable attribute of the acquisition of language knowledge (Oxford, 2003; Vlčková, 2005). However, it is not only important for learners to have memorized as many new concepts as possible but to have the ability to use these words in communication, and to keep these words in long-term memory. There are many memory and compensation strategies (for instance: sounds, movements, image ideas, learning errors, repetitions, acronyms, analyzes) that are helpful for the learning and retention of new concepts.

In addition to the importance of various compensatory strategies, Oxford (1990; in Jenpattarakul, 2012, p. 572) also confirmed the importance of visual imagination when memorizing individual concepts: "Firstly the majority of learners prefer visual learning. Secondly the brain capacity for visual information is higher than for verbal material. Thirdly the clusters of information most effectively go into long-term memory through visual images. And finally the images are effective for recall." The work with mind mapping seems to be very helpful when visualizing and decoding the received information.

Pictorial methods for the recording of different pieces of knowledge have been used in education for centuries. They were first identified in 1940 by a team of experts from the University of California, Berkeley, led by Tolman (1948, p. 191-192) who claimed that "the cognitive map is a type of mental representation which serves an individual to acquire, code, store, recall, and decode information about the relative locations and attributes of phenomena in their everyday or metaphorical spatial environment".

Another type of pictorial portrayal that we encounter in history in learning processes is the semantic network. This type of portrayal was developed around 1950 as theory for the understanding of human education. Among the most prominent experts who were involved in the research of semantic networks were Collins and Quillian (1969).

In 1972 mental maps with various recorded concepts appeared for the first time. Mareš (2011) draws attention to the fact that in literature the name of J. D. Novak is linked to the establishment of mind maps, but this is an American point of view. Similar efforts appeared in Europe much earlier, for instance in the works of Kulič (1971).

Based on the available literature, it can be said that there has been a significant shift in the area of mental mapping in our country as well. Contemporary authors who pay attention to cognitive mapping are: Fishera (1997), Pupala and Osuská (1997), Škoda and Doulík (2011), Mareš (2001), Gunišová (2012), Duchovičová and Gunišová (2015), Petrová and Kozárová (2015) and others.

Mareš (2011, p. 224) understands the mapping of concepts as “a metastrategy of education when a learner learns to find concepts in the curriculum and identify the relationships between them”.

According to Fisher (2004, p. 107), mental mapping refers to “all procedures that represent thinking by some images.” It is an effective tool that captures information and ideas, identifies key concepts and visualizes knowledge in a meaningful structure.

We characterize the mental map as a concept of mapping, a graphic representation – where nodes represent concepts and bonds represent the relationships between concepts. References that mark kinds of relationships between the concepts may be one-directional or bi-directional. We can classify concepts and references, and based on this fact the conceptions of maps show either the time or causal relationships between individual concepts. The concept of mapping is particularly useful in the process of idea creation. In the design of a complex structure, it helps with learning and incorporates new and old knowledge into a cognitive structure.

The work with a mental map is really necessary for a person. As Buzan (2007, p. 7) claims, the map helps one to easily add new information to the information that is already stored in his/her semantic network. Due to the mind map the new as well as older information is sorted out in a natural way. When designing a mental map one engages both brain hemispheres. The left one is employed for logical order, words, concepts and numbers, and the right one for imagination and visualization. When learning a foreign language it is possible to use mental mapping as:

-
- a tool to detect possible errors and misconceptions;
 - a tool for the identification of key concepts;
 - a tool for the creation of a structure and hierarchization between individual concepts;
 - a tool for the implementation of new information into a wider context;
 - a tool for the engagement of both brain hemispheres into learning processes;
 - a tool for the development of higher cognitive skills;
 - a tool for the development of convergent, divergent and complex thinking;
 - a tool for the development of the strategic and critical thinking;
 - a tool for simple transcoding of information into an easier memorable form;
 - a tool for the development of metacognitive skills.

3 Work with concepts

Amongst the large number of memory and compensation strategies, the “key word” method in the process of retaining knowledge related to foreign language learning is the most discussed (Atkinson & Raugh, 1974; Hauptmann, 2004; Shapiro & Waters, 2005; Jenpattarakul, 2012). This method consists of combining visual association with auditory association (Vlčková, 2005). The basic step of this method is the recognition of a keyword in the mother tongue that has a similar pronunciation as a foreign word, hence the creation of an auditory association. The second step is the formation of a notion for a certain relationship between the key word and a foreign one, hence the creation of a visual association (Solso, 1998; Shapiro & Waters, 2005).

For the purposes of this article, we draw on the definition of Atkinson (2003, p. 697) who claims that a concept is “a set of properties that we associate with a particular class of objects and phenomena.”

The process in which we assign a concept to an object is called categorization. Through concepts we can divide anything into smaller units, due to their so called “predictive power” with which we can categorize objects even when such information cannot be directly perceived.

Bloom (2015) points out that the learning of words is not easy at all because a child’s learning requires individual mental abilities (conceptual, social, linguistic). The concepts are learned using a special mental mechanism in which of great importance is the ability to acquire concepts, to show intentions to others, to possess the ability to understand syntactic structure and have memory abilities.

Conceptual learning can be characterized as a relatively demanding issue with two basic paths leading to it, that is, the formation and assimilation of concepts. Under spontaneous formation of concepts is understood the process used by the learner as “trial and error” through which he/she discovers things and assigns them the denotation taken over from adult individuals. The second method is to search for the meaning of words and, at the same time, construct new concepts. An inseparable part of the theory of meaningful learning are the so-called “advance organizers” which can be described as tools that help a learner to integrate new knowledge into his/her ever growing cognitive structure.

First and foremost for each teacher should be the investigation of how a learner processes new information – how he/she learns and thinks. These cognitive processes can in later interpretation determine what teachers can change, improve, modify, to make the learning result have as high quality as possible. Therefore, a learner’s habitual status cannot be ignored – teachers should build on the information and knowledge that has already been acquired by a learner (the information and knowledge have a stable position in his/her cognitive structure) and take into consideration to what extent cognitive functions have already been developed by the learner.

We cannot require learners to apply critical thinking and interdisciplinary links while learning foreign languages when their teachers do not interconnect new knowledge in one particular subject with those that learners already know. It is also important that learners themselves work on the development of their own cognition so that they understand their mental activity.

Scholars have tried for decades to find out if the result of conceptual learning is the proper understanding of the meaning of each concept or the correct understanding of complex concepts and relationships between them. The explanation and interpretation of concepts while learning a foreign language as well as the learning of any subject are immensely important. Learners do not always understand, or they do not understand at all, what adults mean when they give a thing a precise name. One way we can express and illustrate our understanding of a concept is to express it through a mind map.

Concepts are modified so that they gradually become more demanding. In the present school, when learning a language teachers should try to outline the broadest range of options that learners can use to help them. One option is the use of mind maps in the learning process. It is generally known that the most difficult to remember is a specific information – a knowledge that is isolated without any logical link, so it cannot be associated with other elements of the curriculum.

Conclusion

The main aim of the paper was to show that there are further options for the development of learners' work in foreign languages. It is important that each teacher during his/her lessons shows different strategies through which learners can work effectively in a foreign language. The more strategies they use the better level their knowledge of the foreign language will be at.

It is evident that the inclusion of mind mapping into the education process shifts the learning of foreign languages more towards the acquisition of informal language knowledge which implies the ability to use languages to solve problems of a different nature. We believe it is important to help learners to be able to independently create such learning strategies through which a foreign language would become part of their everyday life.

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Dark and literary: A tour to the Isle of the Dead

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Abstract

Sites associated with the dark and literary aspects of tourism can prove beneficial to travellers since they can play an educational role while instigating an emotional and intellectual response. This article illustrates how a tour to the Isle of the Dead at Port Arthur in Tasmania provided the nescient traveller with insights into the literary and historical heritage of the place. The experience also acted as an inner journey in that it challenged the traveller to reassess his engagement with travel destinations.

Key words: dark tourism, Henry Savery, literary tourism, Port Arthur, Tasmania.

1 Introduction

Ever since very young I have been fascinated by two particular aspects of travel. The first consists of visiting places associated with the books and authors that have played a formative role in my life. In this category I could mention Fyodor Dostoyevsky's apartment at 5, Kuznechny Pereulok in St Petersburg, or else Angkor Wat in Cambodia, which is the setting for André Malraux's (1930) *La Voie Royale* [*The Way of the Kings*]. The second aspect concerns places linked to death or human tragedy. Examples of these consist of the 9/11 Memorial in Manhattan and Hỏa Lò Prison in Hanoi. Whereas the first kind of travel destination is typical of literary tourism, the second type is emblematic of what Lennon and Foley (2000) call dark tourism. Sometimes the two forms of tourism merge together in one place. For me this was most apparent when visiting the tombs of famous writers at Père Lachaise Cemetery in Paris and Novodevichy Cemetery in Moscow, even though the darkness of these two places was somewhat lessened by their historicity.

In my travels to literary and dark places I have always sought to enrich my understanding of the human experience and by being in situ to learn further about things I might have only come across in my reading. Bendix (2002) explains that since the beginning of bourgeois travel a site's potential to generate a narrative is one of its main attractions given that tourists struggle "to wrest a personal experience and an individual memory from the thick offering of prefabricated or suggested memories for sale" (p. 474). Tourists seek "personal

authenticity in their development” and the site acts as “a landmark to distinguish the destination, participants’ geographical placement and some of their travails on their journeys” (Obenour, 2004, pp. 12–13). This means that “within particular destination contexts, tourism can begin to take on the characteristics of a sacred journey although it may not be spiritually motivated” (Sharpley & Sundaram, 2005, p. 170). It is probably for this reason that Bond and Falk (2013) argue that “identity-related motivations are fundamental to all tourist experiences...suggesting that tourism is often used by individuals as a means to explore, maintain and even disengage from particular aspects of identity” (p. 430). As I show in an earlier piece (Xerri, 2014), by travelling to a place I might have only read about in literature, travel guides, newspapers or travel writing, I am usually forced to align my reading with the physical actuality of the place and in the process evaluate my own identity as a traveller and a human being.

What I seek when travelling is a transformative experience I can reflect on, ideally in writing. The idea that travel is an inner journey as much as it is an outer one is something bequeathed by the great explorers in history, whose steps the contemporary traveller cannot but retrace. Laing and Crouch’s (2009) use of narrative analysis to study contemporary travellers’ experiences “reveals a common discourse or paradigm of the *performance of adventure*, where the traveller is following in the footsteps of explorers of old” (p. 136). The re-enacting of these mythic journeys is both an attempt to see the places these great explorers discovered but also to experience for oneself the act of transformation they unavoidably underwent. In his literary history of travel, Whitfield (2011) proposes that in a time when travel has become another manifestation of consumerism “the worthwhile travel writer has to keep alive the idea of the inner journey, the transforming experience: he or she has to be our eyes and our conscience, reminding us of what is genuine amid so much that is worthless” (p. x). The reason why I admire such travel writers is that they not only write evocatively about the places they visit but most significantly they reflect on how the journey and the place changes them unexpectedly. Such reflection is not only the preserve of the seasoned travel writer but can also enrich the experience of the contemporary tourist. For example, the participants in Van Winkle and Lagay’s (2012) study “talked about ‘ah ha’ moments, where something they saw during their trip caused them to critically reflect on their thoughts and experiences” (p. 352). Cultivating the ability to reflect on one’s travel experiences is crucial if travel is to have a transformative effect. In this article I reflect on how a visit to a place that combined aspects of literary and dark tourism acted as an educational experience as well as an inner journey that transformed my understanding of how I engaged with travel destinations.

2 Two aspects of tourism

Literary tourists travel to places that have either featured in the books they read or else in the lives of the authors they are familiar with. These places usually bank on the fame of the writers or works in question in order to attract as many visitors as possible. Hence, such places might manifest a commodification of literary tourism. Müller (2006) contends that literary places have become tourist destinations well equipped to cater for the needs of contemporary tourists and aimed at developing the local economy. Ridanpää (2011) argues that “When an ‘ordinary’ place turns into a literary place, the social and cultural appreciation of it is often raised to a new level, and if local actors become interested in this, the place can be transformed into an attractive tourist destination” (p. 105). Nonetheless, visiting such places can prove beneficial for both the site and the tourist. Smith (2003) found that both literary tourists and volunteers working at sites associated with a literary figure “derive significant rewards from the literary aspects of the sites” (p. 83). According to Wallace (2009), “The literary tourist, in his veneration of an authorial site, restores the depth of memory to spaces that are in danger of being flattened by artifice” (p. 49). Part of the reason why this happens is that the visitor would probably have first experienced the site through their reading of literature or works that celebrate the life of the author. In fact, Cohen-Hattab and Kerber (2004) point out that “the creative literary approach can offer interpretations of the tourist site that might sometimes do a more adequate job of relaying its multiple social, historical and geographical particularities than more widely accepted forms of ‘tourist literature’” (p. 71). A literary place has the potential to enrich its visitors, who in turn bring with them an almost singular sense of veneration cultivated by the rewarding experience of reading literature associated with the site.

In the case of dark tourism, the visitor is drawn to places that have gained notoriety because of terrible events that occurred in the past. However, the reason for which the tourist might wish to visit such places is not necessarily the morbid allure of death or tragedy. If that were the case then dark tourism would simply be “an attempt to intellectualize the uncertainty about a concern that traverses the existence of humankind, death” (Korstanje, 2011, p. 427). Moving away from the descriptive understanding of dark tourism found in *supply* and *demand* approaches, Biran et al.’s (2011) study adopts an *integrated supply-demand* perspective that propounds an experiential understanding of dark tourism: “The findings suggest that tourists’ motives are varied, and include a desire to learn and understand the history presented, a sense of ‘see it to believe it,’ and interest in having an emotional heritage experience. Furthermore, the relative importance attributed to the motives revealed, indicates that interest in death is the least important reason for the visit. The findings indicate that

tourists are mainly motivated by a desire for an educational or emotional experience" (p. 836).

In this view of dark tourism, visitors are primarily interested in learning about the place and its history as well as themselves as human beings. This is in line with Darlington's (2014) idea that "dark tourism can provide emotional release, with the visitor gaining some kind of perspective and understanding" (p. 44). The perspective nurtured by dark places is a perspective on one's cultural and human heritage and this is mediated both intellectually and emotionally.

3 Arriving in Tasmania

My exploration of the dark and literary took place whilst on a recent visit to Australia. While literary tourism is not heavily developed in Australia (Yiannakis & Davies, 2012), its only form of dark tourism is constituted by visits to former prisons (Wilson, 2011). Even though the tourism images used to promote Australia "remain heavily influenced by Romantic notions of rural idylls and the picturesque" (Beeton, 2004, p. 134), Rofe (2013) points out that "not all discourses concerning the rural are idyllic. Darker, more sinister discourses of the rural are identifiable within Australian popular culture" (p. 270). Literature plays a significant role in articulating such discourses. In my visit to the Isle of the Dead, a tiny island off the coast of the former penal colony of Port Arthur in Tasmania, I became aware of how a dark reality resides beneath the idyllic and picturesque.

With only a free weekend sandwiched in between two intensive weeks of research at the University of Sydney, I decided to board a plane and fly to an island that had always fascinated me. Nowadays known as Tasmania, as a child I found its original name exotic, magical. Van Diemen's Land. At this stage in my journey I had not yet read Anthony Trollope's travel book about Australia. On his visit to Tasmania in January 1872, the novelist commented that the name Van Diemen's Land "is now odious to the ears of Tasmanians, as being tainted with the sound of the gaol and harsh with the crack of the gaoler's whip" (Trollope, 1875, p. 128). Lacking knowledge of Tasmania's history, I associated its original name with the mystery of an island that has given us the elusive Tasmanian devil and the now extinct tiger I had seen on some grainy, black and white video. The thylacine was an animal I grew interested in after reading the poem 'Loop' by Cliff Forshaw (2011). This island, cowering beneath the weight of the massive continent to its north, was said to bewitch visitors with the beauty of its wilderness. Even if I only had 48 hours to spare, I wanted to step on Tasmanian ground and breath Tasmanian air, experience the land I had hallowed in my childhood imagination.

My ignorance of Tasmania's history meant that it would only be later that I would find out that the island has been described as "Australia's most ethnically

homogenous and economically underachieving state with a history of violence and repression almost unprecedented in its barbarity" (Tumarkin, 2001, p. 196). All I knew at this point was that the island was named after the explorer Abel Tasman who had discovered it on 24 November 1642. Petrow (2014) explains that "All societies need heroes and, as Tasmanians perhaps have fewer of them than other places, Tasman stands out. Tasman displayed the characteristics of endurance and bravery in overcoming the fear of the great unknown" (p. 169). My journey to Tasmania was unwittingly a journey into what I did not know and the discoveries I would make would be a product of its dark and literary past, as well as of my own naivety.

I landed in Hobart late on Friday evening. The very first difference I noticed as soon as I stepped out of the aircraft was the cold biting into my bones. I reminded myself that I was now much closer to Antarctica. On the bus to my hotel I realised that Hobart was more of a town than a city. It lacked the glitter and the bustle of a big metropolis. Its suburban roads were muted; its residents seemingly tucked away inside their homes; the streets emptied of life. However, I would soon realise that I was somewhat mistaken.

Approaching the city I could see a score of searchlights crisscrossing the night sky. I knew that Rafael Lozano-Hemmer's light installation *Articulated Intersect* formed part of Dark MOFO, Hobart's annual winter festival organised by the Museum of Old and New Art. The 18 searchlights were positioned at six different points along the waterfront and were meant to beam light 15 kilometres across the city's sky. They were operated by the festival visitors by means of levers and despite consuming huge amounts of power were meant to symbolise the intimidating nature of searchlights, especially with respect to the hunt for migrants.

After checking into my hotel and changing into warmer clothes I ventured out into the cold, intent on not wasting any of the precious little time I had. As I got closer to the waterfront the streets grew livelier and music filled the frigid air. There was an atmosphere of drunken cheer and bright red lights bounced off the buildings and the water. It momentarily felt like being in a huge red light district. Tomorrow was the winter solstice and the city was in celebratory mode. It was much more subdued than the cheer typical of the southern Mediterranean countries I was more familiar with, but I could not help but admire Hobart's residents for braving the cold and putting on a show. Dark MOFO was in full swing. A musician dressed as a tiger was playing an assortment of homemade instruments, including one of those garbage cans that usually feature in New York movies. Another street performer was playing the guitar and making up rhymes by means of the words given to him by a small audience standing huddled around him. People were queuing to buy fish and chips from a number

of kiosks by the water's edge. A Ferris wheel illuminated by purple light circled above a crowd of music aficionados.

Walking along the waterfront I saw the *Aurora Australis* and the *Astrolabe* moored next to each other. The ships serviced the Australian and French research stations at Antarctica respectively. Australia lays claim to around 43% of Antarctica, which as a continent is nearly twice its size. Due to its proximity to Antarctica, Hobart has traditionally played a vital role in polar expeditions. This makes sense when you consider that the city is closer to Antarctica than it is to Perth in Western Australia.

4 Booking a tour

Determined to visit somewhere else apart from Hobart during my brief sojourn in Tasmania, the following morning I went in search of the Tassielink bus terminal on Brisbane Street. Not having a map or an Internet connection on my phone, I trusted my instincts and headed up the hill away from the waterfront. After walking a few blocks I started doubting whether I was going in the right direction. I scanned the street but it was completely empty despite the fact that it was seven o'clock. I reflected on whether the deserted streets were due to the early morning cold or the hangover that Hobart's residents must have been nursing after the night's celebrations. I kept on walking and after a while I met an old lady walking her dog. She led me downhill, apologising for not knowing where Brisbane Street was by telling me that in the past 43 years she had never felt the need to catch a bus. Luckily, before walking much further she asked a passer-by for directions and he told us that Brisbane Street was further uphill.

Arriving at the bus terminal I found it still closed. I waited for the office to open with a McCafé coffee in my hands, this being the only coffee shop I could find open at 7.00 a.m. After a short while a young woman joined me, what I presumed to be another passenger. Once the office opened I booked the first tour that departed that morning. The bus arrived and picked us up. For the entire journey we would be the only two people on the bus and yet my fellow passenger ensconced herself on a seat at the very back of the bus and by means of a pair of earphones plugged into her smartphone discouraged any attempts at communication. This seemed typical of a digitally nurtured solipsistic mentality.

My destination was Port Arthur, a penal station for repeat offenders that operated between 1830 and 1877. The place has been described as "the most effective prison ever concocted by humankind in the most remote dominion on earth" (Howard, 2011, chap. 27). Port Arthur was 96 kilometres away and the journey would take around one and a half hours. We crossed the River Derwent on the Tasman Bridge, a section of which collapsed on 5 January 1975 after a bulk ore carrier hit some of the pylons. I looked down at the water below and tried to imagine how the five motorists who died in the disaster must have felt

while driving off the bridge. The collapse of the bridge divided Hobart and led to a number of social problems on the eastern shore of the city, such as an increase in crime and neighbourhood disputes.

As soon as we passed by Hobart International Airport, which despite its name exclusively catered for domestic flights, the Tasman Highway cut low across the water, with Orielton Lagoon on one side of the causeway and Pitt Water on the other side. I immediately started to realise how spectacular Tasmania's landscape was; this was further confirmed once we passed the town of Sorell and started driving along the Arthur Highway. Valleys, forests and mountains were smothered in mist, plumes of it hanging still and low in the air. My childhood imaginings about this wondrous land were proving to be true. The yellow signs warning drivers to be on the lookout for kangaroos, in a way pictorial representations stereotyping Australia, were to be seen at certain points along the way. However, Tasmania went a step further. Signs featuring a ferocious Tasmanian Devil with its mouth open clearly underscored this island state's distinct identity while still embracing the Australian spirit celebrated in wildlife tourism brochures.

5 Touring Port Arthur

On arriving at Port Arthur I was disappointed to see the main penitentiary building clad in scaffolding and fenced around by tri-ply wooden sheets. If I had been aware of Trollope's (1875) book at that point I would have been hard pressed to identify what I saw with his description of Port Arthur: "Perhaps no spot on the globe has been the residence during the last sixty years of greater suffering or of guiltier thoughts" (p. 140). Why was it that after having travelled thousands of kilometres to visit this place it had to be spoiled by the contraptions of a \$7 million restoration project? This seemed to be happening way too often on my trips. I would travel a long distance itching with anticipation to experience a place I had only read about or seen in pictures and film, longing to shoot a few memorable pictures and post them on social media, only to find there was only scaffolding with which to fill the viewfinder. Perhaps this was poetic justice for having developed the tourist's habit of pursuing the snapshot rather than savouring the genuine experience offered by the destination. In a world where every mobile phone owner is a photographer almost no corner of the globe escapes being frequently uploaded onto the Internet. This is symptomatic of what Draper (2013) describes as the "hyper-egalitarian, quasi-Orwellian, all-too-camera-ready 'terra infirma'". The places we see in photographs lure us to them and as soon as we get there we immediately seek to capture them in yet more photographs. This vicious cycle makes us impatient with the destination, unable to stand still and drink in the experience with our senses. The act of taking a

photo reassures us that we have ticked this place off our to-see list and nudges us to move on to the next destination.

At the Commandant's House I learnt how tourism in Port Arthur started immediately after the closure of the penal station. Despite the destruction wrecked by bushfires, the dismantling of a number of buildings, and the attempt to erase the memory of the area's convict history by changing its name to Carnarvon, tourists swarmed to the site and gradually carried off a large part of it with them as souvenirs. Pridmore (2009) explains that "The good citizens of Hobart had a great, possibly morbid, interest in the old convict settlement and it was only three months after its closure that visitors began to arrive" (p. 16). The Commandant's House first became a guesthouse in 1879 and then the Carnarvon Hotel in 1885. A post card from the time shows a young girl leaning on the stair railing leading up to the main entrance and looking out over the harbour. The Guard Tower can be seen in the background and this helps evoke a highly romantic atmosphere, strikingly in contrast with the brutality practised at the penal station when it was open. The Arthur Hotel stood close by, occupying the former Commandant's Office and Law Courts.

Since the late 19th century tourists have visited Port Arthur in droves, wanting to satisfy their curiosity about a place that destroyed the physical and mental health of hundreds of men. At the Separate Prison, for example, convicts were placed in solitary confinement for 23 hours a day and were not allowed to speak unless spoken to. When they attended mass three times a week in the chapel the convicts sat on rows of partitioned wooden benches so that each convict occupied a tiny cubicle from which he could only see the preacher. Port Arthur was based on prison reformer Jeremy Bentham's idea that prison was meant to grind criminals into becoming upright members of the community. According to Pridmore (2005b) "What percentage of those men were physiologically impaired when confined is unknown but *the treatment* could hardly be considered remedial" (p. 38). The Separate Prison was particularly fascinating for tourists and in December 1877 a tour made up of around 800 visitors was responsible for causing damage to the building.

The pillaging carried out by tourists and local residents as well as the bushfires that intermittently tore through the area mean that Port Arthur is nowadays only around 30% of what it once was when operational as a penal colony. At the police station, which now houses an archaeology display, I read a letter purportedly written by a man who wanted to return a brick he had stolen from the Separate Prison while visiting Port Arthur on honeymoon. In the letter he claimed that ever since stealing the brick he had experienced one misfortune after another, some involving his car breaking down, one in which he ran over a kangaroo, and others involving episodes of ill health and personal injury. The brick seemed to have jinxed him. I wondered whether this was an authentic letter

or an ingenious kind of warning to tourists against the temptation to steal from the site.

The morbidity of the penal settlement was accentuated even further by the fact that on 28 April 1996 it witnessed one of the world's worst shootings in contemporary history. Martin Bryant entered the Broad Arrow Café and opened fire on visitors and staff with a semi-automatic rifle. Then he continued his rampage in other places on the site. By the end of his shooting spree, Bryant had murdered 35 people and injured 23 others. Bryant (as cited in Frow, 1999) chose Port Arthur as a setting for mass murder because "A lot of violence has happened there. It must be the most violent place in Australia. It seemed the right place." It is for this reason that Tumarkin (2001) describes Port Arthur as a traumascape: "a time-space materially and discursively bound by traumatic repetitions" (p. 202). The café was subsequently gutted and made part of the Memorial Garden for the victims, a place where "there is no sensationalisation or dramatisation of the event. Instead, the garden provides the context for quiet contemplation and sad reflection by visitors and for emotions such as anger, pride and remorse" (Frew, 2012, p. 45). Following this tragic event, the Visitor Centre was built to cater for the needs of the increasing number of tourists visiting the site, some of whom probably visit to see the site of the massacre. More broadly, "an immediate institutional effect of the Port Arthur massacre was that it brought about the introduction of a uniform national firearms licensing and registration framework and the compulsory surrender (with compensation) of semiautomatic firearms" (Carcach et al., 2002, p. 110). Banerjee and Osuri (2000) question the Australian media's description of the Port Arthur massacre as the worst massacre in the country's history given the fact that the nation had been founded on a history of massacres. A case in point is the genocide that exterminated Aboriginal Tasmanians in the 19th century.

6 On the Isle of the Dead

After having visited the main site, which is comprised of more than 30 buildings, ruins, grounds and gardens, I paid for a tour to the Isle of the Dead. The island is one nautical mile away from the mainland and is around one hectare in size. Nearing the island on board the *MV Marana* I could that it was covered in trees and part of its shoreline consisted of steep rock face. Seals were lying on their back with their flippers protruding out of the water; sometimes it is even possible to encounter migrating whales. I partly chose to book this tour because the island's name had been used by Sergei Rachmaninov for his symphonic poem, by Val Lewton for his 1945 horror film, and by Arnold Böcklin for his 1886 painting. I had seen Böcklin's painting at the Metropolitan Museum in New York a few years before as well as behind the title credits in Lewton's movie. Moreover,

Mariss Janson's 1998 recording of Rachmaninov's composition was one of my favourites.



Figure 1 – The Isle of the Dead

When the penal station was in operation the Isle of the Dead acted as its burial ground. It served this purpose for 44 years. In 1833, the Reverend John Allen Manton (as cited in Pridmore) stated that the island “would be a secure and undisturbed resting place where the departed prisoners might lie together until the morning of the resurrection” (2009: 18). Not only convicts were interred in the island's soil, however. Ross (1995) estimates that the island is the final resting place for more than 1,000 people, including military and civil officers, their wives and children. The number of graves densely packed on such a tiny island is somewhat unnerving. Here Trollope (1875) met a certain Barron, a convict working as a gravedigger whose life “was the most wonderful” (p. 150) given the freedom he had whilst confined to the island. Barron “was in very truth monarch of all he surveyed... But he surveyed nothing but graves” (Trollope, 1875, p. 150). Just as the residential quarters at the penal station were segregated according to whether one was a convict, soldier, officer, or the governor, at the Isle of the Dead different sections of the island were reserved for different categories of people. The convicts were buried in unmarked graves at

the lower end of the island on its south side. The guide informed us that there exist theories that the convicts were buried naked in communal graves. The free men were buried in a different part of the island and each grave was marked by means of a stone: "Even beyond death it was important to ensure that the guilt-soiled soul of the convict did not mix with the free – for whose eternal rest was reserved the higher, north side; so they should be the closer to heaven" (Howard, 2011, chap. 27). Despite these attempts at class segregation, this tiny island acts as a microcosm of society at the time. According to Pridmore (2005a), "Many questions remain to be answered about the Island. What is apparent however is that all classes, officials, soldiers, wives, children, Point Puer boys, paupers, insane and even sailors are buried alongside hundreds of convicts" (p. 1). Research as to the identity of those buried on the island is still ongoing and this might help to dispel some of the mysteriousness of this place.

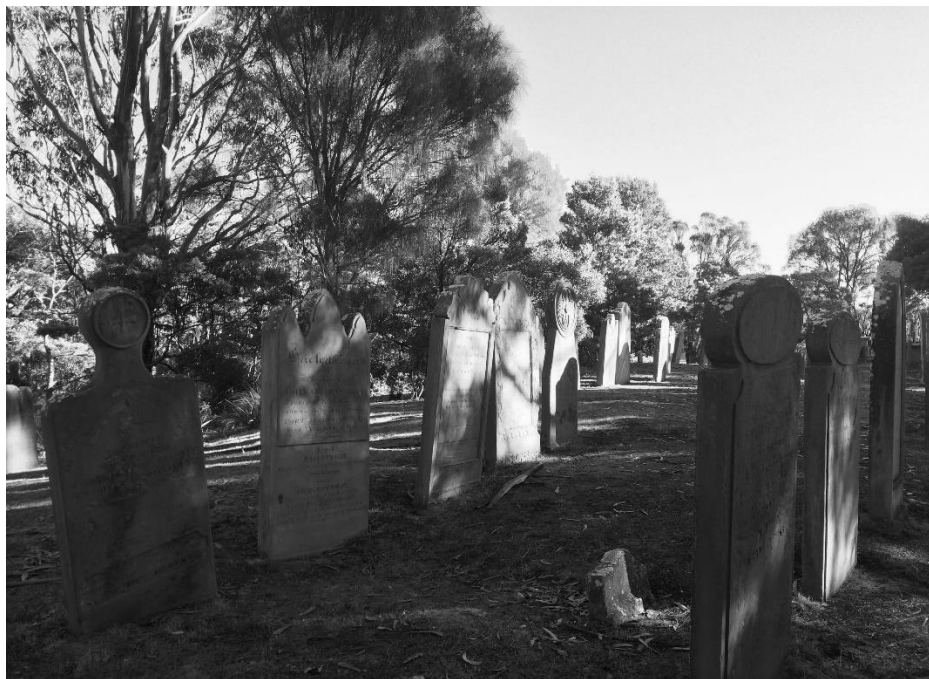


Figure 2 – The Gravestones of the Free

7 Discovering Henry Savery

The tour guide explained the history behind a number of graves and delved into the stories of some of the dead buried on the island. My curiosity was piqued

when she showed us a commemorative gravestone for a convict by the name of Henry Savery. Despite being a convict and hence buried at some indeterminate place on the island, in 1992 the Fellowship of Australian Writers erected a gravestone for Savery. This marked the 150th anniversary of Savery's death and the gravestone replaced a memorial plaque dating from 1978. This honour was accorded to Savery because he was the continent's first novelist. This was something I discovered on the day and when I later discussed it with colleagues at the University of Sydney they confessed to being equally surprised. They had always considered that honour to belong to Rolf Boldrewood, a romantic novelist who realistically portrayed pioneer life in Australia.

The gravestone carried the following inscription:

IN MEMORY OF
HENRY SAVERY
AUSTRALIA'S FIRST
NOVELIST
*Businessman, forger,
convict and author.*
Born 4th August 1791
Somerset, England
Died 6th February 1842
Port Arthur, Tasmania
1825 Transported to
Van Diemen's Land
for forgery.
1830 Released and his
novel *Quintus Servinton*
published.
1840 Arrested again
for forgery and sent
to Port Arthur.
1842 Died, possibly
from a stroke.

The inscription summarises the sad life of a man who aspired to success in his lifetime but was to gain it only after his death. Giordano and Norman (1984) claim that "it was Henry Savery's misfortune that he was too ambitious by nature" (p. 10). His main ambition in his lifetime was financial success and this led him to amass substantial debts. It was this that made him twice forge bills of exchange. His posthumous fame is not really bound to the quality of his writing

as much as to the historical value of his novel. This might be typical of the “tendency to mark down our pioneer writings and to treat them merely as passable in a historical sense” (Miller, 1958, p. 2). Savery’s claim to fame rests upon the fact that his novel marks the incipience of Australian literature: “*Quintus Servinton* holds its position by setting, date of publication, and residence of the author” (Hadgraft, 1962/2000, “Biographical Introduction”). Nonetheless, his fame is of the esoteric kind. According to his biographer, “Most Australians would struggle to name the country’s first published novelist” and this is probably the reason for which Savery is “destined to dwell in obscurity – an author lost to the literary backstreets” (Howard, 2011, “Author’s Note”). In fact, there are only two streets that bear his name in Australia, one found in the suburbs of Canberra and the other being a cul-de-sac in a Melbourne suburb.

As a writer he achieved notoriety in Hobart once he started writing satirical sketches of well-known people in town and publishing them in the *Colonial Times*. He used a nom de plume because convicts were not allowed to write for the press. This also served to protect him from the ire of the powerful individuals he lampooned. In 1830 his sketches became Australia’s first book of essays, *The Hermit of Van Diemen’s Land*. The autobiographical novel published that same year was first begun in prison. Savery “had known few better places to write. The gaol walls guaranteed preservation from the temptations beyond” (Howard, 2011, “Prologue”). The novel’s title was inspired by the fact that the author considered himself to be the fifth son in his family. Moreover, Servinton is very similar to Servington, the name of a noble family connected to the Saverys. The novel’s subtitle hints at its autobiographical nature: *A tale founded upon incidents of real occurrence*. Many of the events that the novel’s protagonist goes through mirror those in Savery’s own tragic life. In fact, while Savery “may never have been master of his destiny, *Quintus Servinton* would allow him to be creator of his past” (Howard, 2011, “Prologue”). Savery’s biographer recounts how “the deeper I dug the more I discovered that Henry’s novel was virtually no novel at all. It was a coded diary of events cocooned within a long, desperate *mea culpa* to his adulterous wife” (Howard, 2011, “Author’s Note”). When published in London in 1831, the novel did not gain widespread appeal amongst readers. This was because Savery’s “relentless preaching grated with the more liberal tastes of English readers” and hence in England “his career as an author was over before it had begun” (Howard, 2011, chap. 23). Savery is criticized for adopting a hortatory style for his convict narrative: “The fact remains that the style is impossibly formal and the preaching comments on life are annoying” (Bayliss, 1973, p. 145). The novel has a number of “obvious defects: it is often long-winded, and its general comments on life in general can become tiresome; and its style is to our ears intolerably orotund” (Hadgraft, 1962/2000, “Biographical Introduction”). Despite its questionable literary merits, *Quintus Servinton* marks

the first milestone in Australian literature; that is enough to guarantee that Savery's name will live on into the future.

The reason for which the gravestone expresses uncertainty as to the cause of death is that one of his closest friends claimed that Savery cut his own throat while serving a life sentence at Port Arthur following his second conviction for forgery. Shortly before Savery's death, the travel writer David Burn described him thus: "I could not contemplate the miserable felon before me without sentiments of the deepest compassion, mingled with horror and awe. There he lay – a sad and solemn warning" (as cited in Pridmore, 2005a, p. 29). If Savery did take his own life, this would have meant he had finally succeeded after two previously botched attempts. He was 48 years old.

8 Conclusion

My impromptu tour to Port Arthur led to my fortuitous discovery of Savery's grave. This would lead me to conduct many months of research on his life and writings, as well as on the history of Port Arthur and the Isle of the Dead. What started as a tourist's desire to see a small part of a land that had always enraptured the imagination developed into an investigation of a tour destination as an embodiment of the dark and literary aspects of tourism. The Isle of the Dead enriched my knowledge of Australia's literary heritage and dark past. On the island the two are intertwined given that Australia's first novel owes its origins to the country's convict history. On this tiny island covered with hundreds of graves sheltering in the shade of weather-beaten trees I came to understand why Port Arthur "has the depth of meaning few places in Australia can claim to possess" (Tumarkin, 2001, p. 197). My visit provided me with an insight into this depth of meaning and it was only by developing my own narrative of the journey that I was able to situate myself with respect to the place.

The experience of travelling to Port Arthur was both moving and stimulating. Witnessing the remnants of its history of violence I became more aware of the complexity of the human experience as located within the social, geographical, cultural, and moral landscape. As an inner journey my tour made me reflect on the idea that my ignorance as a traveller had to be rectified or else each destination I would visit was bound to be merely another name scratched off the list of places to see. The consumption of travel destinations without a proper digestion of the experience is unedifying. I realised that in the case of a place like Port Arthur this was fundamental if I wanted to resist feeling numb in the face of two manifestations of human inventiveness: literature and punishment. The tour pushed me to question my identity as a traveller and to transform myself into someone whose journeys are in harmony with the poet Derek Walcott's (2004) notion that "We read, we travel, we become" (p. 31). Travel is an appetite for learning, for movement, for being.

My conception of Tasmania as a rural idyll was challenged by the knowledge I acquired in the course of my research into its brutal history. My tour to Port Arthur acted as a spur for me to learn further. It marked the beginning of an educational experience that I would probably not have undergone if I had not been intrigued by what I saw and felt on site. This is in line with Welch's (2013) idea that "a defining characteristic of prison museums is their sited-ness. Such sites become a major draw card for tourists because the prison and its pedagogy are viewed as authentic" (p. 483). Anticipating the closure of the penal colony, Trollope (1875) predicted that its buildings "will fall into the dust, and men will make unfrequent excursions to visit the strange ruins" (p. 153). Luckily, he was wrong. After the destruction wreaked by tourists, bushfires and years of neglect, Port Arthur is now the focus of intensive conservation efforts. Hopefully, this will ensure that many more tourists will be able to reap the multiple benefits of visiting a site that combines the dark and literary.

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The reception of antiquity in nineteenth-century British literature – an attempt at theoretical synthesis

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Abstract

The aim of the paper is to make an attempt of theoretical synthesis connected with the idea of reception studies. It presents major aspects which are crucial for understanding the reception studies, especially for the reception of antiquity in Victorian literature (for instance chosen critical approaches to literature, contemporary tools for conducting the research like intertextuality). The paper also presents definitions of classics, classical tradition and reception and tries to explain why Victorian times and literature are a perfect research material to examine the reception of antiquity.

Key words: Reception studies, Reader-Response Criticism, antiquity, classical tradition.

Introduction

Although the reception studies is not a new literary trend, it can be still developed, as the process of reception is still happening, it is vital, active and undergoes constant changes. To approach the study of reception, one should get familiar with its characteristics.

First of all, reception as such is a complex process. It perfectly fits into the Reader-Response Criticism theory, as it assumes that the text and the reader meet. This meeting constitutes the point of reception. The text becomes alive in the form of the reader's consciousness (Batstone, 2006, p. 17). The academic further develops the definition of the point of reception: "Reading then is the complex act of hearing the words of another, which is the complex act of making them fit within the linguistic structure and context (that is, history and genetics) of our own consciousness – it brings new contexts and analogies that are understood by virtue of old contexts and figures. It may uncover ideas that were already ours but of which we were ignorant; it may bring the familiar into unforeseen combinations. It may require the invention of new metaphors or new blindnesses just as it can stir old passions and refigure forgotten stories" (Batstone, 2006, p. 17).

The above definition confirms the possibility of conducting the research with such tools and approaches as intertextuality, Reader-Response Criticism and others. It makes us aware of the complexity and versatility of the subject analysed, as well as of the difficulty of the task.

Classical reception and tradition

Classical reception, or, the reception of the classics is a very complex and multi-dimensional question. To make an analysis of the presence of antiquity in the nineteenth-century English literature, it is crucial to arrange the theory of reception first. To start with, it is worth noticing that classical studies are themselves the form of reception, which is quite ironic, as Porter claims (2008, p. 469).

To clearly understand the idea of reception it is necessary to define the term *classics* or *classical* for the purposes of our understanding of the topic. The opinion of Silk seems to be the accurate one, as it claims that "*the classical* means the world of ancient Greece and Rome and *the classical tradition* means reflexes of, uses of, reconstitutions of, or responses to, the ancient world from the disintegration of the Western Roman Empire to our own day. [These two terms have] always had strongly positive connotations" (2014, p. 4).

There is a difference between perceiving the reception of the classics in the past and nowadays. Porter (2008, p. 470) defines the process of developing the study of classical reception in a following way: "It was once a staple of Classics that it should discuss itself – its history, achievements, failings, directions and so on – in addition to going about its business. That is, the history of classical scholarship (with a strong bias towards philology in the narrow sense) was once a formal element of classical studies and recognized as such. Today this has for the most part changed. Of course, the history of Classics continues, as ever, to be an implicit and ineliminable part of the disciplines that variously make it up: just to analyze the text (for example) is to conjure up the history of that text; a line of commentary can hardly be read without reading up on or about earlier commentaries; footnotes throw slivers of light upon predecessor generations; and in general arguments for novelty stand on the toes of giants, as well as on their shoulders".

So, a scientist should be aware of the constant changes that the reception of antiquity undergoes and pay attention to the whole continuous process of self-evaluation the classics is subjected to. That is why, as the academic further notices, it is impossible to reach the final level of the studies, which are constantly on the move; nevertheless, a scientist should be aware of the fact that he or she is able to conduct the research and get the knowledge which is institutionally, socially and culturally possible – this is the very essence of the history of disciplines (Porter, 2008, p. 471). What is more, a scientist while

conducting a research simultaneously deals with continuous development – but this cannot make the past, being a foundation of European tradition, become doomed (Kucz, 2014, p. 7). It is also crucial to become aware of a significant feature of reception in general: it is the ability of showing the factors that can contribute to the new responses to a given text from the past, because “antiquity and modernity, present and past, are always implicated in each other, always in dialogue – to understand either one, you need to think in terms of the other” (Martindale, 2006, p. 5- 6). That is why, as the academic further adds, the word *reception* is much broader than it seems to be; it replaced the terms: *tradition* and *heritage*, which did not cover the active role of the receivers of the analysed text (2006, p. 11). This active role, which can be defined by dynamism in perceiving the analysed text, constitutes a characteristic element of the reception which is based on either enriching the meaning or liberating it for the particular reader¹; nevertheless, this point of understanding the text evokes further discussion which constitutes the point of reception (Batstone, 2006, p. 14).

Porter pays attention to the important fact of the analogy in developing the reception studies and Graeco-Roman studies (2008, p. 471):



The graph presents the parallel processes of developing in general reception studies as such, and the studies of ancient Greece and Rome; it altogether leads us to the phenomenon that is reception of antiquity within itself. So, as the academic claims, “our sense of the past is shaped by its sense of its own past”. The process of reception of antiquity is characterized by a constant reception which creates a study consisting of numerous layers, similar to the structure of a palimpsest; the texts are transmitted to us by, among others, anthologists, and at the same time the texts are subjected to the process of both transmission and reception, which constitutes a whole (Porter, 2008, p. 471- 473). This is caused, among others, by the fact that people are not the direct inheritors of the classical tradition, they are the witnesses of the process which is based on the connections of different receptions throughout history. Moreover, no one can be sure while analysing the ancient object, whether he or she got rid of all the layers of later influences, and even if one did so, it is not certain that he or she will see a great clear example of antiquity; it would be rather a poor basic representation of what it became later on (Martindale, 2006, p. 4 and 12). Silk (2014) complements the

¹ These ideas of Martindale are supported by Batstone (2006, p. 14).

above idea of reception by claiming that the classical tradition overlaps with the reception of antiquity, but they do not mean the same, classical tradition is a broader term than the reception of antiquity.

The academic further states that we can distinguish different levels of reception; on the basis of Virgil's *Aeneid*, the academic makes an attempt to present them (Silk et al., 2014, p. 4):

1. Virgil's *Aeneid* as the source material to the criticism of his own times.
2. Virgil's *Aeneid* and the response to it, presented in later antiquity.
3. Virgil's *Aeneid* as the subject of criticism of later analysts (e.g. of T. S. Eliot)².

In general, only the third level of reception presented above can be significantly included to the classical tradition as such, which is definitely broader than the idea of the reception of antiquity. This Silk's statement complements the view of Porter with the information that the classical tradition not always means reception: if one considers the Romance and Modern Greek languages, he or she will observe that they are not the reception but they definitely constitute the part of the classical tradition. Furthermore, the academic points to another crucial difference between the classical tradition and the reception studies; while "the classical tradition refers to the consideration of value, the reception studies operate more in a relativistic spirit, generally preferring cultural-historical engagement (...) to critical engagement" (Porter, 2008, p. 4-5).

It is worth emphasizing at this point, what actually the very nature of classical tradition is. Silk et al. (2014, p. 10-11) distinguishes several important features of it, referring them to the notion of tradition (see Table 1).

The comparison in Table 1 shows the outstanding character of the classical tradition and its place among the other types of tradition. It is also worth noticing that "the history of 'the' classical tradition abounds in instances where ancient texts and artefacts, ideas and ideals, have acquired new identities within other cultural traditions (...) – the upshot of which is a panorama of receptions, some of them remote from 'our' tradition altogether" (Silk et al., 2014, p. 12).

In the above-presented view, it is clear that the classical tradition should be perceived as distinct, vast, diversified and individualistic. That is why it is quite difficult to define its time lines. Nevertheless, one can distinguish several crucial moments in history that can be perceived as those which influenced creating the idea of the classical tradition. These, according to Silk et al. (2014, p. 17 - 19), are:

² At this point it is crucial to notice that every time the reception of a particular ancient motif is concerned, it differs from the previous one; as Kucz comments, providing the reader with the observations of Whitehead, you can make a copy of an ancient sculpture, but you cannot make a copy of an ancient state of mind, because there is a difference between modern and ancient reactions to the same stimuli (2014, p. 8).

Tab. 1: Comparison of tradition in general and classical tradition (Silk et al. (2014, p. 10-11))

Tradition in general	Classical tradition
1. Is understood through chronological and geographical terms (e.g. Victorian Britain, German classicism)	1. Covers different nations and ages
2. Concerns particular (e.g. national) groups and their past	2. Does not possess any particular owner due to the fact that there are numerous responses to it, as well as it appears in various versions
3. Is associated with a particular nation and period in history	3. Is diffuse and diversified
4. All the traditions are characterized by: continuity and change, stability and flux, repetition and innovation	

1. An attempt to create a corpus of texts made in the third century BC in Alexandria. Callimachus (among others) tried to approve of some examples of Greek literature and make them model roles for the literature of a new-formed empire of Alexander.
2. The first translation of a Greek text into Latin by Livius Andronicus (the third century BC), which initiated the process of creating the literature of a particular nation on the basis of another literature. This event seems to become a role model to imitate by later writers, as far as their attitude towards the classical canon is concerned.
3. The fall of the Roman Empire on 4 September 476 which can be seen as the moment of the beginning of the classical tradition marked by the end of ancient times.
4. The development of Latin to its classical form as a point of reference (between the lives of Cicero and Ovid) and the establishment of the Attic Greek as 'classical' Greek (of Aristophanes, Plato and Demosthenes), as well as the appearance of the Hellenistic **κοινή** (a common dialect).
5. The mixture of pagan (ancient Latin and Greek) elements with Christian history and culture.

Nevertheless, in the light of the above statements, it should be pointed out that the process of shaping the classical tradition was long and complex, and it is difficult to conclude with certainty which moment or moments in history were determinative. That is why one should be aware of the continuity and dependence of particular events and processes on creating of what we know nowadays as the classical tradition.

All things considered, while discussing the idea of reception studies, one should remember that the final, pure, not contaminated image of it does not exist,

because the process of reception is still active and dynamic. We actively produce the past and receive it in a passive way. The reception studies exploit numerous combinations of intertexts, due to the fact that they deal mainly with the earlier received texts, and the whole process of reception is subjected to constant dynamism (Porter, 2008, p. 474-475). It is the proof that the Western culture is definitely centred on the classical tradition (Silk et al., 2014, p. 51) which, being on the move, creates questions, reflects on itself, and in this way produces other images which constitute the part of reception studies. As Silk et al. (2014, p. 220) summarize, "(...) the boundaries between ancient past, classical tradition, and our own moment in time are now seen to be fluid, not fixed. We now think we understand that our access to Greco-Roman antiquity is necessarily mediated in some degree through the innumerable responses that make up the tradition, which is therefore part of our antiquity, and part of us".

Methodology and research tools

To approach the study of reception it is a good idea to use the complexity of several critical approaches to literature. First of all, the historical and biographical approaches seem to be the ideal sources for presenting the context of ancient times which is used in the works by nineteenth-century writers. Moreover, as antiquity is characterised by seriousness and didacticism, it is essential to exploit both moral and philosophical approaches. The subject itself (antiquity) requires to use mythological and archetypal methodology in the research, as myths are communal and they let the nations find their common features and their identity. Nevertheless, Reader-Response Criticism seems to be the most crucial method to be used in analysing ancient elements in Victorian literature, due to the fact that the reception studies are reader-oriented per se. Finally, Bakhtin's dialogics constitutes an essential tool in the research, as it shows the reception studies in the light of intertextuality; when the traces of a given ancient writer in a nineteenth-century work are analysed, they can be perceived through the multitude of perspectives, so intertextual, as well as intermedial tools may be useful here. It is not surprising, as Witosz claims, that every text is of intertextual character, because it is very difficult, if not impossible, to get rid of influences from other works, cultures and ideologies (1997, p. 53).

Intertextuality can be also associated with the ways antiquity is exploited in Victorian works through the typology of reception by Stabryła (1996). Although he was not the first academic to define the place of antiquity in literature, his idea seems to me the most complex and accurate. Earlier, in the nineteenth century, pursuing antiquity called the study of influence was a popular trend. Stabryła resigned from this and approached to the reception with functionality (1996, p. 5). His idea of processing ancient motives is based on four ways:

1. Revocation – repetitions, imitations and processing of subjects and motives with no essential change of meaning.
2. Reinterpretation – the change of the sense of an ancient motif.
3. Prefiguration – it is a system of analogies between the given work and the ancient motif, which is noticeable while comparing the fates of the protagonists or the structure of the presented world.
4. Incrustation – these are various ornaments (metaphors, allusions, comparisons etc.) characteristic for poetry (Stabryła, 1996, p. 8-9).

The above concept by Stabryła perfectly fits into the general ideas of intertextuality by Genette, which can also constitute the tools for further research. Genette (2014, p. 7 – 11) distinguishes five types of intertextuality, or, transtextuality:

1. Intertextuality (originally created by Kristeva), which means coexistence of two or more texts, the presence of one text in another).
2. Paratext – some additional elements in the surroundings of the major text, for instance: title, introduction, illustrations, etc.
3. Metatext – a kind of critical commentary that links one text to another, not necessarily through quoting it.
4. Hypertextuality – the relation connecting text B (hypertext) with text A (hipotext). Text B is created on the basis of text A with no comment on text A, however, text B cannot exist without text A.
5. Architextuality – it is a wordless relation based on a paratextual reference of a taxonomic character, for instance: *Poems, Essays*, etc.

By applying the above described approaches and tools, the analysis of the presence of antiquity in the nineteenth-century British literature should acquire the complex and versatile character.

Why Victorianism?

It is crucial to state why Victorianism itself is a particular period chosen for the analysis of the ancient reception in British literature. In the nineteenth century classics played an important role in numerous discussions over the condition of the country (Silk et al., 2014, p. 29). What is more, the status of the classics changed significantly, as far as the academic point of view is concerned. The crucial thing here is that the classics has undergone numerous changes, transformations and analyses for ages and it is still subjected to them. As Schaps rightly notices, “with the advent of Christianity, the classics faced attack as something decadent and pagan; now they face competition from cultures that began as their own imitators” (2011, p. 11). That is why the study of antiquity is not the easy one; we should be aware of the fact that it is elusive, prone to changes and analysed from the numerous perspectives. It is true, that in the

nineteenth century science radically broke up with ancient tradition – but not because it was fed up with the classics as such; on the contrary – the academics and artists criticised the way antiquity was used so far: it was filling the literary works with mythological names and terms. They wanted to break up with these schemes and started to look for new sources of inspiration. Both political changes and technological development inspired a new modern style of thinking, there appeared a campaign favouring a new shape of art and there started the change of the whole cultural paradigm (Piętka, 2007, p. 9-10, 12).

It was particularly the nineteenth century when antiquity met with unusual interest; the study of classical world was broadened – it was no longer the study of the languages (Latin and Greek) and the texts created in them, but it attempted at analysing the complete picture of the society (language, culture, history, etc.) (Schaps, 2011, p. 11-12). As the academic further states, that was an essential change of the attitude towards antiquity; another one appeared in the twentieth century and was based no more on producing new approaches to the classics, but rather on employing the approaches created elsewhere to perceive the classics in the new light, for instance: through feminism, structuralism, etc. All in all, the broadening of the study of the classics in the nineteenth century contributed in future to perceiving it as an interdisciplinary field (Schaps, 2011, p. 12).

Another crucial reason for taking up the subject of the reception of antiquity in Victorian Britain is the fact that the classics was then significantly shaped on different levels, for instance the term *classical* itself was established at the beginning of the nineteenth century. Of course, it functioned earlier, in the sixteenth and seventeenth centuries, however, its meaning was not firmly defined then as synonymous to Graeco – Roman antiquity (Schaps, 2011, p. 56).

Antiquity in Victorianism – Reasons for Interest

Antiquity is without doubt the most frequently revived source of culture. Its spatiotemporal range is so wide that all the connections with antiquity may be difficult to be defined (Jatczak, 2010, p. 153). Antiquity and its various motives have become the inexhaustible source of inspiration in the majority of cultures and Great Britain is of no exception. The status of antiquity in Victorianism is worth analysing, as the interest of nineteenth-century people in ancient times grew over particular social, political and cultural conditions.

As Vance claims, Latin and Greek were taught at schools, but with the emphasis on Latin, which had always been more popular than Greek. It was even one of the requirements if one would like to enter the university. Nevertheless, for the students under 13, both classical languages were not known, and the classics itself was usually available (especially for girls) through translation (Vance, 2007, p. 96). According to Ogilvie, teaching classics was one of the major tasks in the Grammar Schools and it was the part of the foundation statutes of

educational institutions (1964, p. 97). With reference to Oxbridge, Latin and Greek were definitely a masculine task; there was a popular postulate, according to which "Latin should be available for all, girls and boys, whereas Greek should be available for all gentlemen" (Stray in Orrels, 2011, p. 141). Apart from the age, it was the social class as well as gender that influenced a person's education in the field of classics: it was definitely the field of study for men of middle and upper classes of society (Silk et al., 2014, p. 35). Haynes's opinion makes this statement complete; the academic claims that the classics played an instrumental role in the process of the elite education between sixteenth and twentieth centuries. Furthermore, the knowledge of Latin and Greek by the nineteenth century became the factor identifying the person as belonging to the middle, professional class and the elite, and in Victorian times it marked the border between the elite and the rest – especially the knowledge of Latin which was known by gentlemen in contrast to English language known by the rest (2006, p. 44). Knowledge of the antiquity was essential in creating national identity as well as it enabled people to gain respect and recognition in the society (Richardson, 2013, p. 14-15). Moreover, classical education helped to maintain cultural authority and became a status marker, for instance, in the case of quoting and alluding to antiquity during the speeches in the Houses of Parliament (Monros-Gaspar, 2015, p. 11). As the century progressed, Greek language and culture started to become more and more popular. Roman culture was still studied, as the effect of the Renaissance programme of humanist education, nevertheless, the rising popularity of the study of Greece and its language could have been the effect of its original character (Turner, 1999, p. 61). The classics became reorientated towards Greek (especially towards the works of Plato and Thucydides) at schools and it met with great approval (Ogilvie, 1964, p. 98). What is more, "To appeal to Rome was to draw upon a line of continuous cultural influence within Europe; to appeal to Greece was to appropriate and domesticate a culture of the past with which there had been, particularly in Britain, a discontinuous relationship. And that very discontinuity may have been part of the attraction for nineteenth-century writers who regarded much of their own experience as discontinuous with the recent past" (Turner, 1999, p. 61).

The reason why British schools tried to put more emphasis on teaching Greek rather than Latin in the second half of the nineteenth century could be the fact that Hellenism could play the new and powerful role in building and sustaining the ideology of the ruling class (Bowen, 1989, p. 162). It is clear that in the nineteenth century the career of teaching classics underwent a significant change and evolved towards more interdisciplinary science; starting from learning ancient languages it acquired the status of the basis for general education combining culture, literature and languages (Silk et al., 2014, p. 36).

According to Vance, the excavations and archaeological research became more and more popular; one of the reasons of conducting them was the construction of the Victorian railroad which enabled to notice the clear evidence of Roman settlement; in Manchester, for instance, while building a railroad viaduct, some parts of the old Roman fort were found. As the construction progressed, there appeared in Britain a sense of connection between antiquity and modernity. The British perceived the Romans as “great civil engineers and improvers, building connecting roads if not railroads throughout the country, attaining new standards of personal comfort with running water, elaborate public baths, and underfloor heating, and developing a well-attested material culture” (Vance, 2007, p. 90-91). As the academic further states, the connection of ancient world with the British one was also strengthened by establishing in 1865 the British Archaeological Society of Rome, as well as British schools in Rome and Athens (Vance, 2007, p. 90). The archaeological studies, as well as Romano-British history, quickly turned from the amateur level into a scientific activity (Vance, 1997, p. 238). Ancient remains in Victorian Britain also concerned religion; in 1852, for instance, the scientists found a chapel of Mithras at Housesteads which was a proof of the *other* (not yet Christian) world present in Britain. Nevertheless, the British found the analogy between the spread of Christianity in Roman Empire and Victorian missionary actions in Africa and India (Vance, 2007, p. 91, 94). Furthermore, Victorians perceived the same Christian faith (for the British and the Romans) as one of the most essential connections between the two nations. The British in the nineteenth century saw the rise of Christian faith in the Roman Empire as a compensation for the fact that the empire started to disappear. In this view, the religious controversies connected with the appearance of Christianity in Rome were seen as parallel to those that occurred in nineteenth-century England (Turner, 1989, p. 173). According to Vance, Greco-Roman world could become for Victorians an alternative for their country’s moral code and orthodox religious views (Vance, 2007, p. 93).

The Romans were seen by the British as very practical; they were perceived as great soldiers, engineers and administrators. Britain could still show the ancient remains of buildings, roads and walls, which were the example of great Roman technological development, as Vance states (Vance, 1997, p. 4). It was one of the reasons of Victorian inspiration with ancient Rome and Greece. Nineteenth-century architecture and art frequently used classical designs, as the academic further claims (Vance, 1997, p. 89). For instance, the Great Exhibition which took part in 1851, shows the inspiration with antiquity; there appeared, among others, souvenir guides with the reproductions of ancient motifs, as well as folding screens with the scenes presenting the story of Cupid and Psyche. Another example of worshipping antiquity was the restoration of Covent Garden

theatre in 1858 – with the appearance of the statues of Aristophanes, Menander, Aeschylus, Bacchus, Minerva and others. It definitely “proved that it was not only the various forms of entertainment but also the very buildings which housed them that evoked a glorious and celebrated foreign but by no means alien past culture” (Monros-Gaspar, 2015, p. 3 and 6). It is worth noticing that the nineteenth century witnessed the appearance of so- called *archaeology of art*. The scientists wanted to reconstruct ancient art by bringing together the analysis of both literary works and monuments. The copies of ancient statues were made simultaneously with reading the texts by ancient writers describing the works of art. The fact that the real nature of ancient art could be found only in the original works made people prefer *genuine* Hellenism to the peripheral Hellenism of Sicily and Magna Graecia (Settis, 2006, p. 28-30). British people wanted to bring the ancient heroes, poets, gods and warriors back to life, that is why reconstructing their statues was a popular activity (Connor, 1989, p. 219).

Except for art, literature, architecture and religion there exists a very popular nineteenth-century idea concerning political, economic and social references to antiquity. First of all, some nineteenth-century expressions connected with politics come directly from the classics, for instance: empire (Latin: imperium, imperii), liberty (Latin: libertas, libertatis), politics (Greek: πόλις, πόλεως = city state), or democracy (Greek: δῆμος, δῆμου = people and κρατέω = I rule).

Furthermore, in Vance’s opinion, Victorians found numerous analogies between ancient conflicts, wars, figures and events, and those in Great Britain (Vance, 2007, p. 97):

Ancient motifs	Nineteenth-century motifs
The fall of the Roman Empire	Symbol of the fact that the greatest tyrannies come to an end
Conspiracy of Catiline	Civil unrest in the 1820s and 1830s
Roman Corn Laws	Debates on the Corn Laws
The figure of Spartacus	Popular figure among the Chartists

The idea of a great empire became popular in Victorian Britain, especially in terms of comparing the Roman Empire to the British one, and showing the explanation to the way British Empire was run. Nevertheless, as the academic further states, there also existed some criticism of the very idea of an empire, especially with the reference to the collapse of the French Second Empire in 1870, and to the appearance of the cult of art and the aesthetic and decadent movement (Vance, 2007, p. 98). However different the views on the imperial power were, it is still the context of the Roman Empire that predominated in the discussion over British politics of the nineteenth century. In Vance’s opinion (1997, p. 198 and 223), the British believed they could become a new and more magnificent Rome, and this idea was a part of the conviction that a process of

national self-identification is being created, although during the discussion about national authority and imperialism in Victorian period, there appeared the arguments both for and against the model of Rome, as it was both rich and unstable.

The idea of comparing Roman and British powers was not the nineteenth-century invention; it could be already noticed in the seventeenth century and it was rather based on the analogy between Britain and the Roman Republic. Moreover, the best resemblance between the two countries can be observed in the idea of the 'mixed constitution', which means sharing power by the king with the representatives of an aristocracy. Another crucial common feature linking the Roman Empire with the British one was, as Vance observes, the fact that Victorian "Britain was now in Rome's position, better than the countries of the Continent at winning and ruling an empire, but inferior to one or the other of them in artistic or intellectual power" (2006, p. 277).

Among the numerous ancient political and military events that were analysed in terms of ancient influences, the Crimean War was one of the most frequent to be recalled. As Richardson (2013), states, generals taking part in the war often tried to compare themselves to the heroes portrayed by Homer and the officers attempted to conduct excavations; moreover, there was popularized the idea that through the conflict Britain helped to bring the ancient past to life again: diaries and memoirs were written down, in which the authors frequently referred to the ancient images and symbols. In general, the idea of the war was good to 'sell' antiquity to people: they should know that the conflict was glorious (2013, p. 75 and 77). Furthermore, the popularization of the war led to the appearance of the idea that nineteenth-century European nations are the descendants of the Greeks and the past should be kept alive. The idea of regenerating the ancient Crimea started to be perceived as a business, as the land was seen as one of the richest in Europe. That is why historians attempted to find a strong connection between ancient Greece and the Crimea. Unfortunately, together with the attempt to bring back the glory of the ancient world, Britain destroyed some of the ancient remains (Richardson, 2013, p. 81 and 100).

Another parallel between the ancient world and Victorian Britain was based on the reference to India as the British colony. British scientists tried to link India with Britain by understanding the relationship of ancient Greece and Rome with the ancient past of India (Mantena, 2010, p. 54). As the academic further adds, the attempt to link the two nations and their history was based on so called 'historical philology'. Through the language analysis the academics tried to prove that India and Britain had some common features in the past: Sanskrit was connected to Greek and Latin on the basis of the membership in the Indo-European language family. But, as the academic rightly pointed out, while analysing the similarities between the languages, the question appeared: why can

the difference between Indian languages and their European counterparts be noticed in terms of the level of development? In response to this question colonial philologists conducted the analysis of literary output of India and Europe. The conclusion they came to was that the 'underdeveloped' languages of India should be reformed, basically through the introduction of the English language to India (Mantena, 2010, p. 54 and 56). As Majeed (1999) adds, the comparison of the literary output of India and Europe appeared in Macaulay's *Minute on Education* (1835). He presented western culture, literature and language as the superior to the Indian achievements (Majeed, 1999, p. 91). As a consequence, English language and culture started to dominate in India and this was the part of the process of colonisation.

The above mentioned process was conducted by Britain with the usage of the idea that Britain's relationship with imperial Rome is analogous to the British attitude towards India³. The idea linking these two relations was the process of acculturation (Mantena, 2010, p. 57).

The British saw the Roman process of 'gaining' new cultures (acculturation) as the one which does not take into consideration the possibility of acquiring independence by the incorporated nations. They interpreted it rather as the process of civilizing India and then, letting it rule itself. A British civil servant Charles Trevelyan noticed a great analogy between the countries that achieved a great success; he compared the achievement of Rome which benefitted from Greece to the position of European countries which by imitating Rome, became successful, and, finally, he claimed that India could "reach the heights of civilisation just as the benefactors of the Roman Empire once did" (Mantena, 2010, p. 58 and 60). However, in the opinion of Majeed, who analyses the views of Lucas and Bryce, a process of assimilation of India to British rules analogous to the process of assimilation of other countries to the Roman Empire was not possible due to the following differences (1999, p. 101):

Rome versus other subjected nations	India versus Britain
Both Rome and the conquered nations formed a unity in terms of religion, patriotism and civilisation.	There is a difference in characters, civilisation, colour and religion between India and Britain.

³ One of the aspects referring to the above relationships is, according to Vance, the way of administration; Roman administration of Britain was perceived as the model of British administration in India (Vance, 1997, p. 238-239).

As the academic further states, in the case of Roman influences on other nations, there was created a uniform civilisation of Greeks and Romans for all, while in the case of Britain it would be difficult to create such a uniformity. That is why the British used comparisons between Rome/ England and England/ India to dispel the doubts concerning political and cultural differences (p. 109). Nevertheless, as Vance claims, the differences had also the attracting power; Victorians liked exoticism, for instance the figure of Cleopatra was as much exotic for the Romans as for the British who watched the Shakespearean play *Cleopatra* in London. This and many other examples of the appearance of exotic elements in Victorian Britain led to the conviction that for Britain, ancient Rome became the model of assimilating the differences: while Rome had its own exotic relationships, Britain also had to cope with its own exoticism – India (Vance, 1997, p. 199).

Except for the comparison of Britain to Rome there also existed the analogy observed by the British in the nineteenth century between Britain and Carthage. Arnold saw Britain as Carthage as far as the naval power is concerned. Although Carthage was a great loser during the Punic Wars (which were compared to the Napoleonic Wars), Arnold noticed its further similarities to Britain: like Carthage, Britain was in need to protect its commercial businesses, mainly in India (Vance, 1997, p. 72). Moreover, as Challis states, both Carthage and Athens already in the eighteenth century became for Britain the alternative option instead of the Roman Empire, as they based their existence mainly on sea and commerce (2010, p. 100). As Challis further underlines, “Britain was the heir of classical Athens and thus the rightful heir of classical antiquities from Athens. (...) the Britons (...) were the true descendants of the ancient Greeks ideologically, culturally and ethnically” (2010, p. 100).

To sum up, as far as the classical heritage is concerned, it is not only the direct Roman influence that shaped British identity; one should analyse the role of the Greek civilisation in the process of creating modern (not ancient) ideas. The concept of Settis seems to be the most accurate here. The academic claims that Greek history is an essential and universal key to understanding the modern world, but only with the participation of the Romans. What is more, one can distinguish two ways of Roman activity mixed together with the Greek one, which gives us the complete image of the classical heritage (2006, p. 10-11):

1	2
Roman expansion of the empire and cultural unification with the Greek elements included.	Greek culture at its peak with the Romans as its first successors and popularizers.

It is clear though, that in nineteenth-century England there existed the tendencies to emphasize and cultivate ancient events and achievements. This had been reflected in the epoch's cultural and literary pieces of art and nowadays it constitutes a great material to be analysed in terms of the study of reception of antiquity.

Conclusion

To sum up, it is worth noticing that the role of the reception studies becomes more and more important in the study of literature. Its unusual character of versatility, changeability and vitality fits perfectly into the popular contemporary approaches to literature, such as Reader-Response Criticism and intertextuality. The reception studies are subjected to constant changes and as such influence the readers' perception of a given literary work. The works resemble a palimpsestic structure and enable the readers to discover their layers. Victorian literature is a milestone in the study, as in nineteenth-century England a great change in the perception of classics took place and nineteenth-century literature is an ideal source material to analyse the traces of antiquity.

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