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UNIVERSITAS QUINQUEECCLESIENSIS, FACULTAS DE ILLYÉS GYULA NOMINATA

Tom. XIII.

SCIENTIFIC PUBLICATIONS XIII.
PTE IGYK



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Pécsi Tudományegyetem
Illyés Gyula Kar



Szekszárd, 2011

ACTA SZEKSZARDIENSIIUM

UNIVERSITAS QUINQUEECCLESIENSIS, FACULTAS DE ILLYÉS GYULA NOMINATA

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ACTA SZEKSZARDIENSIVM/SCIENTIFIC PUBLICATIONS

XIII.

PTE IGYK

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CONTENT

LECTOR SALUTEM <i>Prof. Dr. Béla Horváth DSc.</i>	VII
PREFACE JANKA TEODÓRA NAGY	IX
CHAPTER 1 INSTITUTE OF BUSINESS AND TOURISM STUDIES	
<i>KATALIN B. FÜLÖP</i> THE CONSEQUENCES OF BLAME AVOIDANCE IN CASE OF PUBLIC ORGANIZATIONS	15
<i>ÁGNES SZ. KEDVES</i> PRAXISORIENTIERTE AUFGABEN UND PROJEKTARBEIT IM FACHSPRACHENUNTERRICHT	27
<i>NATALIA KISS</i> HOW DO CULTURES COMMUNICATE THEIR VALUES? - SCHOOLS OF THOUGHT ON CULTURE AND THEIR INTERPETATIONS OF CULTURAL VALUES	39
<i>ÁNDREA MÁTÉ</i> WINE ROUTES IN THE SOUTH TRANSDANUBIAN TOURISM REGION	59
<i>ENIKŐ NAGY</i> CONTRIBUTION OF THE HISTORY OF THE HIGHER TOURISM EDUCATION IN HUNGARY	73
<i>JÓZSEF PICHLER</i> VERMARKTUNG IN DER GASTRONOMIE	85
<i>ZOLTÁN RAFFAY</i> MEASUREMENT PROBLEMS OF THE PERFORMANCE OF ECOTOURISM IN HUNGARY	97
CHAPTER 2 LITERATURE AND LINGUISTICS INSTITUTE	
<i>MARIA BAJNER</i> THE CHOICE OF GEN Y: LIVE TO LEARN OR LEARN TO LIVE	115
<i>DÓRA BORONKAI</i> TEXT BASED COGNITIVE LINGUISTIC RESEARCH OF SPONTANEOUS AND PLANNED CONVERSATIONS RESEARCH SUMMARY	123
<i>BÉLA HORVÁTH</i> INTERPRETATIONSMÖGLICHKEITEN EINES PSYCHOANALYTISCHEN KINDERGEDICHTES	135
<i>MÁRTA KORPICZ</i> RELIGIOUS AND SACRAL COMMUNITIES IN PÉCS	145
CHAPTER 3 INSTITUTE OF EDUCATION	
<i>IMRE BÚS</i> DEVELOPING PERSONAL AND SOCIAL COMPETENCIES BY GAMES IN KINDERGARTEN TEACHER EDUCATION	161
<i>ÁGNES KLEIN</i> PSYCHOLINGUISTISCHE ASPEKTE DES KINDLICHEN BILINGUALISMUS	167
<i>RÓZSA KURUCZ</i> DAS ERBE DER DEUTSCHEN UND UNGARISCHEN KÖRPERERZIEHUNG	183
<i>ANIKÓ CHRISTIÁN</i> INTRODUCTION TO THE HISTORY OF ADOPTED PHYSIOLOGICAL EDUCATION	197
<i>GABRIELLA KIRÁLY</i> THE RELATIONSHIPS BETWEEN THE SPECIFIC LEARNING DISORDERS AND THE INTELLIGENCE STRUCTURE	217
CHAPTER 4 SOCIAL WORK AND SOCIAL POLICY INSTITUTE	
<i>JANKA TEODÓRA NAGY</i> CSIZMADIA ÁNDOR, THE SOCIAL POLITICIAN	229
<i>ISTVÁN VARGA</i> POVERTY CERTIFICATE, BOTH AN ADVANTAGE AND DISADVANTAGE	241
<i>ADRIENN R. KISS</i> ANALYSIS OF THE SOCIAL SERVICE-PLANNING CONCEPT OF THE MULTI-PURPOSE MICRO-REGION ASSOCIATION OF BAJA	253
<i>KRISZTINA JÁSZ</i> POVERTY IN THE RURAL HUNGARY	265

LECTOR SALUTEM

Dear Reader,

You are holding the thirteenth volume of the Scientific Publications of University of Pécs Illyés Gyula Faculty in your hands. Our institution is a relatively young faculty of Hungary's foremost university. Pope Urban V in his letter of foundation considered Pécs an ideal place for spreading science. We believe that the same is true for Szekszárd and our faculty, where generations are taught and educated thus contributing to the development of the region.

This is what the title of the volume refers to, expressing our faculty's affiliation to the region and the town. The subtitle denotes continuity and our commitment to scientific life. Our aim is to provide applicable and up-to-date knowledge for our students to succeed in life. This kind of knowledge is believed to serve the interest of the region and Hungary.

From the establishing of our college in 1977 to the present, our faculty has fulfilled a regional role in Tolna County and Szekszárd by providing a much needed professional workforce. At first, this role focused on primary teacher training, then after the political transformation, the training of social workers (first in Hungary) fulfilled a social demand. Later our portfolio was enriched by fields of economics and humanities. At present our faculty counts 1200 students, who are provided with the necessary scientific capacity and modern infrastructure to be able to prepare for their chosen profession and enjoy the unique university life.

This volume represents a colourful box of knowledge and research. It includes nationally acknowledged mature research findings, as well as studies of colleagues who are at the beginning phase of their careers. It also reflects the wide range of research disciplines studied at our faculty.

We believe that our strength lies in our many-sidedness which enables us to make our students familiar with a wide spectrum of research and science.

Szekszárd

9 September 2011

Prof. Dr. Béla Horváth DSc.

Dean of the Faculty

Illyés Gyula Faculty

University of Pécs

Preface

Showing strong attachment to the city and the locality “ACTA SZEKSZARDIENSIMUM” is now published in the volume XIII of the Scientific Publications. Its aim however has remained the same: to report on the scientific activities of the professors who work for Illyés Gyula Faculty of Pécs University. In the years of becoming a university faculty, disseminating their wide-scale researches with both national and international outlook, and representing their achievements in the everyday teaching practice is essential to realize the quality training.

The structure of this present publication, the authors’ choice of topic represents the teaching and training structure of the Faculty: four institutes are in charge of graduate majors in the training fields of different scientific branches. The volume is also divided into four big chapters so we can have insight into the research topics chosen by the authors.

In the first chapter we can read articles about the most recent achievements of the new scientific field, made by the colleagues of Economics and Tourism Institute. The choice of topic is varied; the authors either analyze the history and conditions of ecotourism, which has growing popularity, or wine-tourism, which is a unique tourism training field of the faculty. Among the section-publications, which are within the frames of the long-run researches and scientific trainings, there is an area of special interest for economics and psychology both, so called research on risk attitude, and a study, which gives details to the history of tourism training in the Hungarian higher education, alongside with several practice-oriented articles, which also focus on methodological approach.

The publications of the second chapter give a taste of the significant research achievements in the field of humanities and social sciences made by the professors and researchers of the Literature and Linguistics Institute. They can either be the expression of a university researcher with serious publication history and scientific achievements, or an article with new issues and hypotheses in the field of communication and linguistics made by authors, who belong to the younger generation

The studies of the third chapter reflect the efforts of professional renewal of the Pedagogic Institute. In each article a special focus is given to the training development, either from the approach of spare-time pedagogy, or the psycho-linguistic aspects of bilingualism of children, or from the point of view of correlation between specific learning disorders and intelligence-structure, or of healing physical education. The historic importance of the studies is well beyond a summary of scientific achievements made in the course of a single year, even in case of the authors, who have already published for many years and now share their research achievements with the professional audience.

In chapter four, we can read various studies, which were made by the professors of the Social Work and Social Policy Institute, offering wider outlook to the research area of the social science. The actual issues of the Hungarian social policy form a common base for the publications, which characteristically differ from each other in topics, methodology and views. As the studies with historic approach also analyze issues which

are in tight relationship with the present social and professional progress and problems in relation to the previous historic sources, and paradigms related to a person. Both the impoverishment and the social exclusion are returning issues in the studies, as well as the questions and dilemmas of locality, central government and planning, which determine the social branch even in its present reality.

„ACTA SZEKSZÁRDIENSIMUM” of 2011 is a kind of selection of scientific publications. It is a kaleidoscope, but not an optical toy “looking at beautiful forms”. We are hoping that with its colourful themes, rich achievements and variety, it will become a kaleidoscope giving exciting picture of the scientific activities of PTE Illyés Gyula faculty for those professionals, researchers, professors and students -- within borders and beyond.

*Szekszárd
9 September 2011*

*Nagy Janka Teodóra PhD
Chief Editor*

ACTA SZEKSZARDIENSIMUM

UNIVERSITAS QUINQUEECCLESIENSIS, FACULTAS DE ILLYÉS GYULA NOMINATA

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1.

INSTITUTE OF BUSINESS AND TOURISM STUDIES

SCIENTIFIC PUBLICATIONS XIII.

PTE IGYK

Szecsárd
2011



PTE IGYK
UNIVERSITY OF PÉCS
FACULTY OF ILLYÉS GYULA



Preface

The colleagues of the Institute have covered a broad range of topics in their essays, from exact tourism products such as wine tourism (Andre Máté's work called Wine Routes in the South Transdanubian Tourism Region, Raffay Zoltán's study written on the 'Measurement problems of the performance of ecotourism in Hungary' and Pichler József's German language essay titled 'Vermarktung in Gastronomie', i.e. 'The marketing of gastronomy') through methodology issues of education (like Szabó-Kedves Ágnes's essay on the topical issues of the specialised language trainings, also in German, 'titled Praxisorientierte Aufgaben und Projektarbeit im Fachsprachenunterricht', i.e. 'Practice-oriented tasks of project work in professional language training' or the work of Nagy Enikő called 'Contribution to the history of higher tourism education in Hungary') to issues such as Kiss Natália's presentation called 'How do cultures communicate their values? - Schools of thought on 'culture' and their interpretations of cultural values') and Braun-Fülöp Katalin's article written on 'The consequences of blame avoidance in case of public organisations'. The versatility of the essays is the greatest merit of this chapter of the book, the interested readers will certainly find subjects that suit their interests and raise further questions in them.

*Zoltán Raffay PhD
editor*

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MEASUREMENT PROBLEMS OF THE PERFORMANCE OF ECOTOURISM IN HUNGARY

THE CONSEQUENCES OF BLAME AVOIDANCE IN CASE OF PUBLIC ORGANIZATIONS

KATALIN B. FÜLÖP

Abstract

The behavior of an organization including risk attitude followed in case of decision making process has long been the subject of economy. The great majority of the investigations however concern the entrepreneur or the entrepreneurial organization. Risk avoidance is a priori hypothesized as a major attribute of both the public servant and the public sector organization without analyzing the details. This study summarizes the research results regarding the components of risk attitude and the main characteristics of the behavior of a public organization and its managers.¹

1. The bureaucratic organization

Risk avoidance has been an intriguing subject of economic research both on individual and organizational levels. The great majority of the investigations concern the entrepreneur or the entrepreneurial organization. Risk avoidance is *a priori* hypothesized as a major attribute of both the public servant and the public sector organization but the specialties of risk attitude are treated by a few works only. Below is an outline of the most important characteristics of risk attitudes of the bureaucrat and the bureaucratic organization.

Practical level conceptualization and evaluation of certainty and uncertainty is determined by the scope of decision, its circumstances and naturally the individual decision maker. Also with regards to risk behavior those active in the business sector are connected by the main objective of their actions: profit gain. Such motivator is harder to find when we look at economic decision makers in the public sector.

The behavior of the state office the decision making attitude of individual players have long been the subject of economists' curiosity; since 1765 – this was when the French philosopher, Vincent de Gourmay first mentioned the word bureaucracy –we have been using this negative terminology when examining the issue. The man of the office, the conformist sitting behind his desk often abusing his power is usually appearing in the next 200 years as the antithesis of

¹ Lector: Dr. Zsolt Huszti PhD

the entrepreneur who is the founder of well being.² According to J. S. Mill, the danger of bureaucracy is that it becomes pedantocracy. Spencer postulates that bureaucrats work only for creating steady employment for their family members and friends, while F. Von Stein specifically advises against having paid accountants, disinterested, propertyless officials sitting on government. The works of the organization-sociologist, Max Weber, in the first part of the last century have re-evaluated the phenomenon. According to him the bureaucratic organization is a consequence of the general development of modern society, more specifically the consequence of normal rationalization. The Weberian bureaucracy is an *idealtipe* which is rationalist in its function fulfillment and helped by its reliability, professional wisdom as well as clear hierarchical pathways. In reality the disfunctionality of the organization – power struggles, job accumulation, sluggishness and opportunism – was an empirical fact during his time. (Kieser, 1995)

There are three theoretical schools concerning the role of public sector and bureaucracy. One is the school of public choice theory³ based on the theses of Niskanen, Wolf, Wagner, Buchanan, Tullock and Stigler which is unmercifully critical of the workings of bureaucracy. Niskanen with his double office thesis analyses the behavior of bureaucrats abusing their monopolistic position (Niskanen, 1968). The also profusely quoted Wagner law (Wagner, 1976), as well as Berry and Lowery also analyze the dangers of the ever bigger role the government plays. With statistical data Stigler proves that intertwined with industrial interest groups bureaucrats are very capable of hijacking jurisprudence from the original intentions of the legislators (Stigler, 1971). Wolf lists non-market errors which result in the proliferation of state institutions: overexpectations of public services, the role media plays in exaggerating market failures or the remains of socialist ideologies not discredited in Western democracies, which all force the growth of the public sector (Wolf, 1979). Buchanan, honored with the Nobel Prize in 1986, was studying public decision making processes and when analyzing the entanglement of politics and economy also pointed to the inevitability of state overspending.

Hallmarked by Musgrave, Marshall and Pigou, the social optimum school⁴ is primarily focused on market failures remedied by state interventions being pushed towards the Pareto optimum. They do not take as evidence either Wagner's growing bureaucracy or the so-called Leviathan⁵ hypothesis. Following R. A. Musgrave, mainstream economic thought is defined by the notion that in a democracy an economy can be maintained successfully for a long time when market mechanisms are complemented by the public sector. Representatives of the trend are too numerous to list, I would briefly mention only two examples here. Paul A. Samuelson wrote *Economics* under this influence which is perhaps the most popular textbook in the science of economics. Also based on the philosophy of social optimum school is the indispensable work of Nobel Prize winner (in

2 During the 20th Century authoritarianism the entrepreneurial activity becomes anti social behaviour, the person and knowledge of the state official is unquestionable. The ideology based on this system fortunately has become marginalised by now.

3 Also known as Virginia school of political economy.

4 Trend as named „Harvard-Musgrave view” by Buchanan.

5 Leviathan is the uncatchable giant sea monster in the Bible (Job, 40.25)

2001) Joseph Stiglitz who also wrote about economics of the public sector.⁶

A much less widespread theory, identified with the Marxist O' Connor, the organic theory of the state, nevertheless certain elements of it are accepted by other schools. According to O'Connor, state institutions must create necessary conditions for capital accumulation and social peace. On one hand when the state increases social expenditures fulfill expectations of entrepreneurs it enhances better profit gaining opportunities. On the other hand it needs to provide consumption products and services to reduce social tensions, which brings an increase of the so-called social expenditures. Both induce the growth of state. (Cullis-Jones, 2003. 577)

The behavior of public sector actors is discussed in all theories primarily when institutional effectiveness is analyzed. The effectiveness at organizational level – the proportion of input-output – and the improvement of rates are classic problems of economy. Several studies prove that business organizations operate with higher efficiency than public institutions. D. C. Mueller provides 71 comparative studies between 1965 and 1998 covering some 20 sectors from aviation through mining to weather forecast services. In only 5 cases did business ventures turn out to be less efficient and further 10 cases revealed no significant differences between businesses and public institutions. (Mueller, 2003. 374-379)

We need to bear in mind that, as a rule, several factors point to the lower efficiency levels of non-business organizations. The most important is the lack of a profit driven philosophy. Beyond this, lower efficiency levels are usually explained by the followings:

1. Operational specifications. Public sector organizations are often active in areas where performance is difficult to measure (prevention in healthcare), only long term performance can be conceptualized (education), consumer satisfaction as point of measure cannot be used (protection), or the organizational operation cannot be compared to anything since the main activities of the organization fall within a quasi-monopolistic position (Constitutional Court).

2. Organisational specifications. Public institutions are not usually threatened by bankruptcy, which means they can afford inefficiency. Their decisions are more often regulated by legal provisions -like rules of public procurement-and these may very well increase expenditures. Their operations depend on annual budget allocations which may also limit the rationalities of economic decisions even if financing is either more or less than what is reasonable.

3. Personal specifications. The strongest binds hindering efficient operations are concerning employees; hiring and firing public servants is always cumbersome and legal provisions of salary allocation may also prevent a rational management of human resource. Tight budget and the system of payroll placement may obstruct the creation of high quality workforce; employment, the retention of employees, even recruiting

6 Stiglitz, J. E. (2000): Economics of the Public Sector, W.W. Norton & Company, London

has irrational⁷ elements. Quality performance by worker is not followed by adequate reward- just as bad performance is not sanctioned- the incentive less environment is thus fed by workers holding back performance.

Heckscher summarizes in three points the factors of bureaucratic organizations' limited efficiency levels. The most important being segmentation: everybody is responsible only for a limited area; hence operational members- workers- protect their respective areas only. Partly because of this and partly because of rigid hierarchical build-up, employees of the public office perform well under their abilities. The other destructive factor is the widespread information systems within organizations, partly remaining hidden, they cannot really be influenced. The third is the inflexible and unable to adapt organization where only fragments of information reach lower levels therefore the institution is gradually degenerated. (Heckscher, 1994)

Through almost all of the above arguments can be seen that the operational specifications and the behavior of high risk avoidance by employees correlate.⁸ However, public sector decision makers, from the point of view of risk behavior, should be divided into two groups. There are tangible differences in the behaviors of an indefinitely appointed officer and the public servant who gained his/her office through voting for a specific period of time.⁹

2. Risk management of public servants

Risk avoiding behavior of the public servant stems from the lack of profit making incentives; risk taking is not rewarded but in contrast an occasional error may very well obstruct promotion, the chance of losing the job however is usually minimal. Employees in the business sector are sanctioned for inefficient performance not only by the owner or his/her subordinate by, for example, pay cuts or dismissal. Eventually the competitive market itself sanctions the inefficient behavior with discontinuation of the organization. The existence-nonexistence of the public institution however follows a different logic. The bureaucrat's attitude is different and as we will see later he/she applies different methods to reduce risks. The less competitive the relation is with other institutions the freer these risk reduction applications are. Niskanen points out that the reason for the uselessness of organizational concentration, termination of duplications, and governmental efforts of centralization in order to increase efficiency is that, eliminating the competition between organizations the bureaucratic institutions are driven into a monopolistic position (Niskanen, 1968). Niskanen also emphasizes the informational asymmetry between

7 Such irrational economic points may be personal interests, considerations according to quota, considerations of fairness, of equal opportunity behind which there may be legal and acknowledged social norms as well as unethical considerations.

8 „*Excessively high levels of risk aversion*” (Stiglitz, 2000. 205)

9 In analyses elected public sector officials are identified with elected politicians as prototypes of votemaximization. In my view leaders of public institutions enjoying different levels of autonomy also follow this behaviour since behind their formal appointment there are decisions made by the boardroom that functions according to the rules of representative democracy.

public servant/officer and his/her commissioner, which leads us to the well-known economic dilemma: the agent problem.

Mueller quotes M. Weber highlighting that the public institution officer also takes effort to maximize efficiency just as everybody else, but instead of profit maximalization he/she maximizes power. (Mueller, 2003. 360) This harmonizes with Niskanen's 4P model (*power, prestige, pay, promotion*) on the factors of the bureaucrat's efficiency function. Generally, these grow proportionally with the physical growth of the organization which means that the public servant strives to maximize his/her office's budget. The less measurable the output of the organization – due to its non-market nature – and the fewer competitors hinder its monopolistic behavior, the more he/she is likely to do so. Investment is an obvious tool to make the organization grow.

According to Knight's theory (Knight, 1921) profit opportunities as entrepreneurial targets are created by uncertainty, ergo only those may realize profit who have sufficient inclination for risk taking and have the adequate sets of information to make good decisions. Therefore there is a strong relationship between the economic conceptualization of profit and the theory of power, eventually both may be attributed to uncertainty and both go to the holder of information. (Mueller, 2003. 362) In other words, uncertainty creates the potential for the validation of power while information assures resources for it. (Mueller, 2003. 360) In a broad sense, power entails economic power – obtainment of resources, rights to make business decisions – , which business managers have and use in order to make profit. It is organizational profit that makes the best resource for individual profit growth. By contrast, political power does not necessarily monetized. We can also say that public servants, officers have a much harder time converting power to money.¹⁰ While entrepreneurial behavior- as the manifestation of entrepreneurial orientation- presumes implicit risk taking, the public servant avoids risks. These two of his/her efforts – the intention to increase power and avoid risk – may, in certain actions, strengthen one another and in other actions they can weaken each other. Let us see what behavioral patterns help or limit public servants to increase power and reduce risks.

1. An increase in the number of office employees, and an increase of decision making bodies. Hood points out that decision making responsibilities may be better spread in a bigger apparatus, which makes the bureaucrat's power grow while reduces his/her responsibility. So the risk avoiding bureaucrat is likely to propagate the installment of councils and ad-hoc commissions. (Hood, 2007)

2. Widespread application of actions, protocols, routines, following predecessor patterns and/or sticking to conventional methods. Personal decision making competence and responsibility in individual elements of the operational mechanism will be small. The organization will remain inefficient because new elements of technological development only slowly trickle in, which makes for a (same) future of big budget and big payroll.

3. What follows from the above is the intention to delay decisions because this way risks will also appear later. And when decision is due out of two projects the one

¹⁰ I disregard corruption in this case.

with delayed risk taking- the further in the future the better- will be more beneficial. And the bureaucrat remains indifferent if this brings with it a delayed obtainment of profit as well.

4. The power of the public servant grows in direct proportion with the increase of the budget. An increased budget also means or, allows for, the involvement of experts in bulk reducing decision making risks or shifting them upon external co-operators. The increase of the incoming value of projects will increase the bureaucrat's power and decreases his/her risk. (Hood, 2007)

5. The previous solutions may only be applied when the efficiency of the organization does not draw too much attention, so Niskanen's hypotheses – the organization is in a monopolistic position, and it is only the bureaucrat that knows his/her actions' real input requirements – are justified. When, however, certain elements of output are measured risk cannot be reduced and power cannot be increased indefinitely by ruining efficiency. Then the actions of the bureaucrat spectacularly shift towards the measured output, as is proven by Mueller with the help of the studies of Lindsay and Dávila and Co. (Mueller, 2003. 370). Building constructions serve as best examples here.

6. A same reaction is brought out when the public or the media expect some visible result or when certain lobby groups manifest their preferences. Members of bureaucracy are then interested in shifting actions towards spectacular and demanded outputs even at the expense of efficiency. This way, the risk of decision falls, implicitly, on the demander.

With regards to public servant behavior, representatives of the social optimum school are less rigorous. Breton, for example, emphasizes that competition for public appointments are just as severe as they are in the business sector so performance hold-up cannot be a maintained behavior in the public sector. (Mueller, 2003) Representatives of the school debate that all members of bureaucracy should follow behaviors described in public decision making processes and their risk avoidance would impede the growth of organizational efficiency. The Musgrave trend generally concedes that operations of public institutions may be shifted towards the optimum with adequate sets of incentive tools. Niskanen objects to such steps being taken in the public sector and goes on to detail how members of bureaucracy deformed systems of incentives like the ones introduced during the Carter and Reagan administrations. (Niskanen, 1981)

3. The Behavior of the Elected Public Servant

There is no reason to suppose that the elected official is not the same efficiency maximizer as the rest of the economic actors. Having no motivation for profit he/she has risk avoiding attitudes and all the behavioral attributes of the organizational bureaucrat. Compared to some lower level bureaucrats they have some particular factors heavily influencing his/her behavior.

1. They are at the top of hierarchy; their actions therefore are followed with particular

attention. That is why the preference of spectacular outputs dominates over the more important but out-of-public-attention actions.

2. A similar circumstance is that the exposing of public institutions of a recent doctrine, transparency heavily influences decision making. (Hood, 2007. 192)

3. Their appointment is limited in time, usually 3-6 years and this induces short to mid-term thinking and short term profit maximalization.

4. Their subordinates are seldom elected, they appoint or inherit them from predecessors so they govern a bureaucratic organization.

5. In case of their actions non-market demand conditions rule. Partly due to the sizes and specific nature of the projects and partly because of the intentional maintenance of the informational asymmetry consumers cannot measure and connect the profits of projects and the burdens- e.g.: increased taxes- that fall on them. This and other factors¹¹ cause excessive demand towards products of the public sector. In other cases, the demand curve is outright uninterpretable when goods cannot be rejected. (Cullis-Jones, 2003. 556) Because of all this, demand barriers hardly limit their decisions.

6. Non-market supply conditions- the emergence of production functions and input-output relation unknown or imprecise, often monopolistic position- again, a more lenient limitation on the decision maker. „*In summary, concepts known from the analysis of the market supply of personal goods are uninterpretable and not applicable with regards to their manufacturing in the public sector. That is to say, government decision makers may act irresponsibly, free from known rules governing the scope of actions.*” (Cullis-Jones, 2003. 557)

Due to the above, the elected public servant does not primarily maximize the size of his/her office. Downs writes about the vote maximizing behavior in which rational decisions serving public interest is hijacked by voter intention to influence, by the length of office term and by the time of re-election. The time horizon of elected officials lasts only to the next election so it is worth for them to even drastically discount the future.¹² (Cullis-Jones, 2003. 555)

Risk avoidance of the elected public servant is special for different reasons as well. Hood writes about the so called blame avoiding behavior, as a unique form of risk avoidance with transparency. Negativity bias, known from psychology, is a generally observed cognitive phenomenon whereby negative information has greater effect and triggers more active reactions so the news value of error and loss is greater than that of positive events. The economic explanation of the phenomenon is the law of decreasing returns. All this leads to the fact that the main effort of elected public officials will be to avoid blame. Managers of public offices may follow three strategies according to Hood.

11 Berry and Lowery name 15 phenomena altogether (I did not detail them here), endogen and exogen factors, all of which tilt towards the Leviathan sized Government; the majority of these push demand barriers upwards.

12 „Discount” here simply means reduction of value. In reality, project choice may be determined by the discount rate used at the summarisation of the future cash flow. It does indeed depend on the evaluation of risk.

1. Agency strategy: reduction, tilt, delegation to office holders, or shift of formal responsibility onto other institutions. This is the way decisions end up being made by constant or ad-hoc commissions and other bodies.

2. Presentational strategy: averting public attention from failure or spinning explanation(s) thereof.¹³ Another, also known phenomenon belonging here is the creative manipulation of performance indexes.

3. Policy strategy: the using of former routines, protocols, standards, copying the practices of predecessors, following traditional scenarios etc.

Hood quotes Hirschmant who, as a result of the above strategies and their combinations, sees official actions tilt towards inefficiency, riskiness and irregularity when demand for transparency is explicit and blame avoiding behavior is strong. (Hood, 2007)

Those who are familiar with the Hungarian history of PPP may easily find examples for the appearances of the above strategies. The old highway construction projects teemed with administrative errors due to negligence, amateurism or lack of experience so the relevant offices applied a widespread use of presentational strategy. For lack of experts, it was an accepted practice to hire agents, who tend to have been business organizations, to evaluate the project – his is the so called agency strategy – who, equipped with only limited information, did some calculations the figures of which later served as the reference point to refute any doubt. In connection with the Hungarian Universitas Program an example of policy strategy may be given: contracts on the development of educational facilities were all uniformed – including risk matrixes – so all project participants were forced into the same „official frame” regardless of the educational, locational and financial or even partnership characteristics of the project.

4. The Agent Problem in the Public Sector

The agent problem usually surfaces as the manifestation of conflicts of interest in the management of business organizations. The bottom line is that the managing director (agent) does not fulfill requirements of the owner (principal), and his behavior is also dictated by his own complex interests. Their mutual interest is the increase of the company’s profit, but at the same time the manager has personal interests as well. Conflict of interest between commissioner and representative is however also present in the public sector and may be conceptualized on many levels. I will offer three examples here:

1. The Government as principal, the office as agent.

Even if control or competition with other offices prevent the ruin of efficiency or growth (in personnel, or in the budget) of the office the risk avoiding bureaucrat can reduce the utility of his/her actions to the point where it is just tolerated by the principal

13 Hence the wordplay „*spinocracy*”.

public opinion or control authorities.¹⁴

2. The tax paying citizen as principal, the state apparatus as agent.

The citizen and the state (including the creator of its administration, the public office) are bound by the so called social contract whereby the citizen pays tax and in return expects the state to spend tax money with the greatest of cares to enhance the well-being of its citizens. Decisions regarding the circumstances of the community are just as uncertain as business decisions so the outcome of state projects is also impossible to forecast with great precision. What is more, the individual or collective interests of the taxpayer may also be significantly different.

3. The office as principal, the elected official as agent.

The study of Dehm and Wigger calls attention to an interesting phenomenon (When the agent is the principal¹⁵), and extends the principal-agent question over to public institutions that have autonomy and elect their own leaders – state schools, universities. In this case the role of agent is assumed by the elected director the commissioned individuals are the employees of the institution who have decided to elect him/her.¹⁶ What is visible here is that the principal-agent problem is more complex in the public sector than in business. The reason is partly because of the multi-level system of objectives and partly because of the weak system of incentives. „*In theory, Government has greater capacity and more tools than private owners to control because they have the monopoly of lawmaking and dictate state enforcements. What lacks is a strong and direct (financial or positional) interest in the success of resource management.*” (Voszka, 2005.11)

In the public sector there is no such thing as bankruptcy threat which threat would otherwise bring out at least a minimal effort to try to be efficient so it is only the public sector agent that can afford not to pay attention to either consumer or proprietor requirements. Self-interest following is general behavior but „*opportunism plays a particular role in economic actions that go with transaction specific investments into human or physical capital.*” (Williamson, 2007. 235)

14 See analyses by Mueller (2003) based on models of Niskanen and Weber.

15 The word *principal* here means „director of the school” while in agent theory it denotes „commissioner.”

16 In the model it is assumed that the elected leader spends office terms and prepares for re-election. He/She is interested in the output increase of the institution – having been commissioned with this at election – and is also interested in his/her re-election. Both objectives guide them towards the motivation of subordinates and towards the possibility for them to earn more. This can be achieved by raising salary or rewarding individual effort. In case of the former, commissioners’ willingness to re-elect him/her grows, but the price to pay will be the diminishing of institutional efficiency since the system of incentives weakens. He/She may opt for motivating performance by increasing the proportions of performance-related pay, by which the efficiency of the institution grows but only successful employees will increase his/her chances for re-election. The theoretic model of the authors show the leader (here, the agent) to be opting for this or that strategy depending on the extent at which increasing of institutional efficiency plays in his/her own utility function or utility resulting from monetary or non-monetary (prestige, privileges) gains that come with the position. As the authors conclude, if it is the latter that dominates the agent’s utility function we can be certain that his/her vote maximalization efforts will dwarf efficiency and public interests. (Dehm-Wigger, 2009)

Although the public sector agent is not really freer in his/her enforcement of opportunistic tendencies it's just they are limited by political risks instead of market risks. (Voszka, 2005. 12) Part of the game is that principal, to reaffirm dependency, always finds fault in others and shifts consequences of his/her bad decisions. The agent's weapon is performance hold-up; maximum performance would not be recognized anyway. What happens, eventually, is that they settle for a lower level performance, reminiscent of the classic case of the Prisoner's dilemma. (Lane, 1999.188)

In the public sector to solve principal-agent problems usually three tools are used: control, sanction, and task specification, or, sometimes too excessively, regulation. The success of all three sets of tool is limited. Limits of control and sanction are known (see McCubbins and Co., 1987), the appearance of control paradox is generally expected regardless of actions and sectors. There is an even smaller margin for sanctioning in the public sector because employee protection of interest through legal provisions and lobby groups is traditionally strong. Extended regulation is the base of the bureaucratic organization. It limits the jurisdiction of employee decisions so the abuse of office (power) could also be reduced by this tool (Soreide, 2002), but, at the same time, it may diminish organizational flexibility and change reaction capacity. Detailed, well-defined rules are not adequate on every single task; due to complexity, trade-off comes into existence and high level regulation may very well impede successful project implementation. (Greenstein, 1993)

Transparency and publicity are ever greater expectations with regards to the operation of the public sector. Publicity is, essentially, a tool in the commissioner's hand which may be used to motivate the agent to do desired tasks. Publicity, however, is a double-edged blade; it reaffirms blame avoiding behavior and generates media frenzy and sham operations. According to Lane, the agent's reputation needs to be checked prior to employment, share task related risk and record it in the contract and motivate him/her with above-average salaries. (Lane, 1999) These only work in case of exceptional public servants where manager-like work agreements are coming in vogue.

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A BLAMÁZSKERÜLŐ MAGATARTÁS KÖVETKEZMÉNYEI
AZ ÁLLAMI SZERVEZETEK ESETÉBEN

B. Fülöp Katalin

Absztrakt

A közgazdaságtan régóta foglalkozik a szervezetek magatartásának kutatásával, beleértve a döntési folyamat során követett kockázati attitűdöt is. A vizsgálatok nagy többsége azonban a vállalkozóra vagy a vállalkozó szervezetre vonatkozik. A kockázatkerülést a priori generális jellemzőnek tekintjük mind az állami szervezet, mint a közszolga esetében, anélkül, hogy a részletek elemzésében elmélyednénk. Ez a tanulmány viszont azon kutatások eredményeit összegzi, melyek az állami szervezetekre és azok vezetőire jellemző kockázati attitűd komponenseit és a viselkedésük alapvető jellemzőit foglalják össze.

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PRAXISORIENTIERTE AUFGABEN UND PROJEKTARBEIT IM FACHSPRACHENUNTERRICHT

ÁGNES SZ. KEDVES

Zusammenfassung

In meiner Arbeit beschäftige ich mich mit der Problematik des fachbezogenen Sprachunterrichts. Zuerst analysiere ich die heutige Lage und stelle zwei Fachsprachprüfungen vor, die ich bezüglich ihrer Praxisorientiertheit bewerte. Im Weiteren werden die Erwartungen der Studenten und die der Arbeitgeber vorgestellt. Dann suche ich auf die Frage die Antwort, wie Fachsprachenunterricht effektiver gestaltet werden könnte. Ich werde die Resultate meiner dreijährigen Untersuchung vorstellen, die ich in drei verschiedenen Seminargruppen unter Verwendung von verschiedenen Lehrmaterialien und Lehrmethoden durchgeführt habe. In diesem Zusammenhang untersuche ich ausführlicher die Verbreitung und Einsatzmöglichkeiten des Projektunterrichts. Ich werde einige konkrete, in den drei Versuchsgruppen ausprobierte Beispiele für praxisorientierte Aufgaben und Projektaufgaben vorstellen. Am Ende meiner Arbeit stelle ich einige Diagramme über die in den drei Kontrollgruppen erreichten Resultate vor, die Effektivität und motivierende Wirkung der Projektaufgaben bestätigen¹.

In meiner Arbeit beschäftige ich mich mit der Problematik des Fachsprachenunterrichts an Hochschulen und Universitäten. Die meisten Studenten äußern sich über das Niveau und Nutzen des fachbezogenen Sprachunterrichts ziemlich skeptisch. Viele behaupten, es sei langweilig und erreicht bei weitem nicht das gesetzte Ziel, die Studenten zu einer Sprachprüfung in der Fachsprache und zu verwendbarem, aktivem Sprachgebrauch auf ihrem Fachgebiet zu verhelfen. Wie kann man den Fachsprachenunterricht effektiver gestalten? Wie können wir den Erwartungen des Arbeitsmarktes, den der Studierenden und der Sprachprüfer gleichzeitig entsprechen? Zuerst möchte ich einen Überblick über die Veränderungen der vergangenen 10 Jahre geben. Wie haben sich der Fachsprachenunterricht und die Fachsprachprüfungen entwickelt, was ist die Meinung der Arbeitgeber über die erworbenen Sprachkenntnisse der Absolventen und wie denken die Studenten selbst über den Fachsprachenunterricht? Wie können wir den Studenten wirklich verwendbare Sprachkenntnisse vermitteln?

Wie kann man die Stunden interessant, nützlich und lebensnah gestalten? Welche Lehrmaterialien und welche Methoden helfen uns dabei? Im Folgenden möchte ich meine Erfahrungen und die Resultate meiner in den vergangenen drei Jahren durchgeführten

1 Lector: Dr. Zoltán Raffay PhD

Untersuchungen zusammenfassen.

Positive Veränderungen der vergangenen zehn Jahre

Es kann eindeutig festgestellt werden, dass die Mehrheit der Studenten mit wesentlich besseren Sprachkenntnissen an die Universität kommt als früher. Viele verfügen bereits über eine Sprachprüfung, es gibt aber weiterhin Studenten, die sich nur sehr schwer in der Fremdsprache ausdrücken können. Für sie bedeutet es große Schwierigkeiten, mit den anderen Schritt zu halten. Diese manchmal riesengroßen sprachlichen Unterschiede innerhalb der Seminargruppen bedeuten nach wie vor eine der größten Schwierigkeiten für den Sprachlehrer. Wie kann man aus einer Gruppe mit so unterschiedlichen Vorkenntnissen eine Gruppe gestalten, mit der man effektiv arbeiten und Erfolge erreichen kann? Welche Strategien können uns am besten helfen? Durch projektbezogenen Unterricht konnte ich das Ziel erreichen, dass sowohl die schwächeren Studenten das Wichtigste (Grundwortschatz, Globalverstehen von authentischen Texten, einfachere, aber selbstständige Formulierung von Briefen, angemessene Reaktionen in Dialogen) erlernen als auch die besseren und wirklich engagierten die entsprechende Herausforderung fühlen und die nötige Förderung bekommen. Durch praxisorientierte Aufgaben und Mini-Projekte habe ich versucht, das Interesse meiner Studenten für die deutsche Sprache, für Land und Leute, Kultur und Landeskunde zu wecken und diese Motivation durch weitere praktische, lebensnahe Aufgaben am Leben zu halten. Als Hauptmotivation diente dabei das persönliche Erlebnis, die auf die Person geschnittene Aufgabenstellung, die positive Atmosphäre bei der Lösung der Projektaufgaben und die Rückmeldung in Form von Antwortbriefen bzw. der Erfolg der von uns selbst organisierten und geführten Reisen.

Veränderungen auf dem Gebiet der Fachsprachprüfungen

In den vergangenen 10 Jahren haben sich auch die Fachsprachprüfungen für Tourismus im Wesentlichen verändert. Es entstanden neben KIT/KITEX und BGF neue Prüfungsstellen wie etwa Gazdálkodó. Im Allgemeinen kann festgestellt werden, dass die Sprachprüfungen den gleichen Schwierigkeitsgrad haben, wobei doch die Prüfung von KITEX von dem Aufbau her einfacher und übersichtlicher ist. Bei Gazdálkodó scheint die schriftliche Prüfung zu kompliziert zu sein, sie enthält meiner Meinung nach zu viele Aufgaben. Bei der schriftlichen Prüfung werden Grammatik und Wortschatz bzw. Leseverstehen mit Hilfe von Lückentexten, Ergänzungsaufgaben und Multiple-Choice-Aufgaben geprüft, was nicht besonders lebensnah ist. Die Sprachlehrer können zwar die Studenten auf diese Aufgaben erfolgreich vorbereiten, die richtige Lösung von solchen Aufgaben bedeutet aber keinesfalls, dass die Studenten über anwendbare Sprachkenntnisse verfügen. Meines

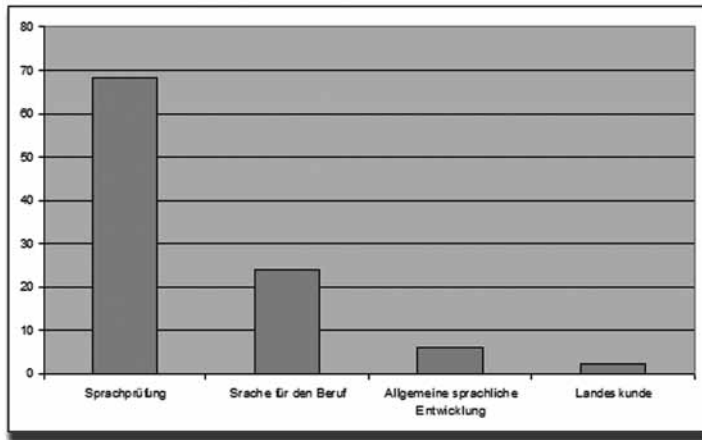
Erachtens wäre es viel sinnvoller, das Globalverstehen mit Hilfe von Fragen zu testen, bzw. auf Grund von authentischen Texten, wie Reisekataloge, Hotelbeschreibungen, Werbetexte eine Zusammenfassung im Ungarischen schreiben zu lassen. Diese Fertigkeiten werden nämlich im Beruf wirklich gefragt und benötigt. Die Briefe, die in der Prüfung anzufertigen sind, entsprechen den Erwartungen der künftigen Arbeitsplätze. Bei Gazdálkodó gilt die Aufgabe „Bericht“ zwar praxisorientiert, ist aber für Studierende ohne Arbeitserfahrung sehr schwer zu lösen. Bei der mündlichen Prüfung sind die Situationen aus dem beruflichen Leben genommen und entsprechen vollkommen den Erwartungen der Arbeitsplätze. Diese zu meistern, fällt aber den Studenten ohne Arbeitserfahrung ziemlich schwer. Bei der mündlichen Prüfung könnte ich mir sehr gut vorstellen, die Sprechfertigkeit der Kandidaten durch eine Präsentation zu prüfen. Nach einer bestimmten Vorbereitungszeit könnten sie über ein Hotel, Restaurant oder über ein bestimmtes Reiseziel berichten. Zusammenfassend: obwohl die Sprachprüfungen viel praxisorientierter geworden sind, bedeutet für uns, Lehrende immer noch ein großes Dilemma, worauf wir die Studenten vorbereiten sollen, auf das Leben, auf die zukünftige Arbeit oder auf die Sprachprüfung. Ich befürchte, dass die Studenten durch den Erwerb ihrer Sprachprüfung die Sprache noch überhaupt nicht im gewünschten Maße beherrschen.

Erwartungen der Arbeitsplätze

Fragt man nach Meinung der Mitarbeiter von Hotels, Gastgewerbeeinheiten, Reisebüros, wie sie mit den Sprachkenntnissen der Praktikanten bzw. der Hochschulabsolventen zufrieden sind, hört man immer wieder dieselbe Antwort. Die Hochschulabsolventen verfügen zwar über zwei Mittelstufensprachprüfungen, können sich aber in der Fremdsprache nicht äußern. Sie haben Angst, sie wagen es nicht, mit den Gästen zu kommunizieren, sie sind nicht fähig, einen korrekten offiziellen Brief zu schreiben, E-Mails zu beantworten, Texte zu übersetzen, Werbetexte in einer Fremdsprache zu gestalten. Überall gab es Beschwerden über die mangelhaften Sprachkenntnisse der Studenten und über den Sprachunterricht an den Hochschulen. Weniger Grammatik, mehr Wortschatz, viele Übungen zur Bewältigung berufsspezifischer Situationen wären gewünscht.

Erwartungen der Studierenden

Sie stehen zwar in dieser Reihenfolge auf dem letzten Platz, sollten aber ganz vorne sein, da letzten Endes ihre Wünsche, ihre Erwartungen erfüllt werden sollten, sie sind nämlich die Kunden, denen eine Dienstleistung- Fachsprachenunterricht- „verkauft“ wird. Seit 2005 führe ich im Kreise meiner Studenten regelmäßig Meinungsumfragen durch. Sofort in der ersten Stunde werden sie nach ihren Erwartungen an den Inhalt des Fachsprachenunterrichts und an den Verlauf, an die Organisation der Sprachstunden gefragt.

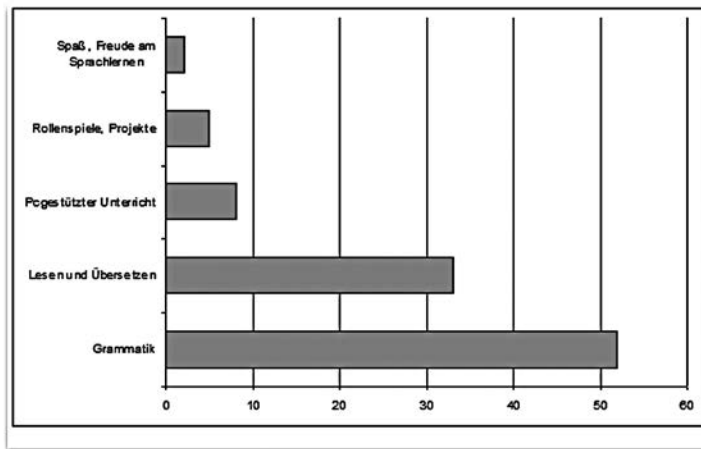


(Antworten von 187 Befragten zwischen 2008-2011) (eigene Konstruktion)

Aus den Resultaten dieser Befragung ist zu sehen, dass die Studierenden vor allem eine Fachsprachprüfung erwerben möchten. Bei der allgemeinen Sprachentwicklung wird überraschender Weise seit vielen Jahren immer wieder die Grammatik auf Platz 1 erwähnt. Es resultiert sich meines Erachtens aus dem grammatikzentrischen Unterricht der Mittelschulen. Der Druck zum Erwerb einer Sprachprüfung scheint die einzige Motivation zu sein, dies kann man aber nicht als echte Motivation betrachten. So müssen wir uns danach streben, ihr Interesse an das zu erlernende Thema zu wecken und die Motivation kontinuierlich aufrecht zu erhalten. In diesem Sinne habe ich in meinem Unterricht die Lerninhalte und Lehrmethoden ausgewählt. Meine nächste Frage, auf die ich eine Antwort suchte, war, wie sich die Studenten den Verlauf der Fachsprachstunden vorstellen:

Abb. 2: Erwartungen an die Stunden

(Antworten von 187 Befragten zwischen 2008-2011) (eigene Konstruktion)



Bei den Erwartungen an die Stunden (Verlauf, Organisation) war die Mehrheit

der Meinung, sie würden wieder die alten, langweiligen Methoden treffen. Freude und Interesse dabei zu haben, wurde von fast keinem genannt. Muss aber Fachsprachenunterricht langweilig sein? Nein, bei Weitem nicht. Kaum ein Bereich eignet sich besser zum Erwerb landeskundlicher Informationen, zum Erwecken Interesse an Land und Leute, zum Kennenlernen faszinierender Landschaften und Sehenswürdigkeiten wie die Fachsprache Tourismus. Nur die entsprechenden Lehrmaterialien und Lehrmethoden müssen dazu verwendet werden. Methoden, die sowohl den Erwartungen der Studenten als auch denen der Arbeitgeber entsprechen und letzten Endes zu einer erfolgreichen Sprachprüfung führen. Diese Methoden habe ich in dem projektbezogenen, praxisorientierten Sprachunterricht gefunden. Im Weiteren möchte ich über die Resultate berichten, die ich in den letzten 3 Jahren in meinen Seminargruppen erreicht habe.

Kurze Vorstellung der drei Gruppen

Alle drei Seminargruppen, in denen ich die Versuche durchgeführt habe, waren fast gleich. Mit einer Gruppenstärke von 12-16 Personen ergab sich eine fast ideale Teilnehmerzahl. Das Sprachniveau schwank vom sehr Guten bis zum ziemlich Schwachen. Die Motivation der KT war am Anfang mittelmäßig aber alle schienen motivierbar zu sein. Man muss sich auch darüber im Klaren sein, dass diese Generation nicht einmal ungarisch lange Texte lesen kann und mag, dabei schnell müde wird. Bei mehr als der Hälfte der KT kann festgestellt werden, dass sie den Sinn der gelesenen Texte, die Zusammenhänge und Folgerungen nicht verstehen, infolge dessen unfähig sind, das Gelesene mit eigenen Worten zusammenzufassen. Ihre Aufmerksamkeit dauert nicht lange, sie brauchen ständig neue Anregungen, in Form von Bildern, Kleinfilmen, Reportagen und dazu verschiedene Arbeitsformen. In diesen drei Gruppen habe ich vier Semester lang mit unterschiedlichem Lernmaterial und unterschiedlichen Methoden gearbeitet, wobei die Lerninhalte (der zu erlernende Wortschatz, Grammatik, die zu schreibenden offiziellen Briefe) dieselben waren und am Ende der einzelnen Lerneinheiten zur Kontrolle des Erlernten derselbe Test geschrieben wurde. In der Versuchsgruppe 1 habe ich das Lehrwerk „Tourismus hin und zurück“ (Autoren: B. Zuba Mariann- Karácsonyi László Tamás-Kovács Krisztina- Révnyé Lőrinc Anna) gewählt. Es enthält interessante, spielerische Aufgaben, viele Übungen zum Wortschatz, wenig oder fast keine Grammatik, zahlreiche Situationen, Bildbeschreibungen, Hörverstehensübungen, Aufgaben zur Prüfungsvorbereitung, Briefe. Vom Sprachniveau her von Mittel- bis Oberstufe, ein Lehrwerk, womit man wirklich gut arbeiten kann. Trotzdem musste ich bald feststellen, dass dieses Lehrwerk allein den gewünschten Lernerfolg nicht geben wird, da es den Lerngewohnheiten der KT nicht entspricht. Bei Mitarbeitern der Tourismusbranche könnte ich mir dagegen das Einsetzen dieses Lehrwerks äußerst gut vorstellen. Bei der Seminargruppe 2 habe ich ein von mir zusammengestelltes Arbeitsheft verwendet und es mit dem PC-gestützten Unterricht integriert. Bei der Zusammenstellung des Lernmaterials habe

ich die Lerngewohnheiten der KT vor Auge gehalten. In den ersten Seminarstunden habe ich ihnen sogar die zum Teil unbekannteren Lernstrategien beigebracht, die die Arbeit in den Stunden und die Vorbereitung für Berichte, Referate erleichtern. Da diese Generation nur ungern lange Texte liest, habe ich kurze, interessante Texte mit vielen Bildern, Videoaufnahmen, Reportagen ausgewählt und um Wortschatz und Grammatik zu festigen, wurden dieselben Texte mit einer großen Variation von Übungen am PC bearbeitet. Um die Aufmerksamkeit der KT wach zu halten, wurden die verschiedenen Arbeitsformen oft gewechselt. Diese müssen aber zuerst auch geschult werden, da viele keine Erfahrung mit Partner- und Gruppenarbeit haben, ganz geschweige über Projektarbeit. Vielen Studenten fällt es schwer, über das Gelesene mit eigenen Worten zu berichten, den Sinn eines Textes zu erfassen, die Hauptinformationen zu entnehmen. Das Mind Map liefert eine gute Lösung zur Zusammenfassung und Zuordnung der Gedanken, gibt Stützpunkte beim Halten eines Referats. In den Stunden wurde der PC eingesetzt, Power Point Präsentationen, eigenes Recherchieren im Internet gehörten zu den Aufgaben in der Stunde und zu Hause. So bildete auch der Unterricht von landeskundlichen Kenntnissen einen organischen Teil des Fachsprachunterrichtes. Einige Beispiele von den Aufgaben: eine preiswerte Unterkunft für eine Studentengruppe in der Nähe von München zu suchen, die Öffnungszeiten und Eintrittspreise, eventuellen Ermäßigungen des Schlosses Schönbrunn zu finden, Schiffsfahrpläne auf dem Bodensee zu studieren, auf den Webseiten von Reiseveranstaltern bestimmte Reisen für bestimmte Personen zu buchen, Formulare auszufüllen, usw. Bei der Zusammenstellung der Aufgaben habe ich viele nützliche Tipps auf der Webseite vom Forum Deutsch als Fremdsprache gefunden. Die Rubriken, wie Lernwerkstatt, Praxisbeispiele für Webprojekte und die kommentierte Webliographie Wirtschaftsdeutsch, ein Internet-Suchkatalog für den berufsbezogenen Deutschunterricht bietet zur Zeit 79 kommentierte Links zum Thema Gastronomie und Tourismus. In der Seminargruppe 3 habe ich für die Studenten Projektaufgaben gegeben, die sie in Partner- oder Gruppenarbeit zu lösen hatten. Einige Aufgaben haben nur 2 Stunden in Anspruch genommen, an anderen mussten sie mehrere Wochen lang zusammen arbeiten, anfangs waren sie „Mini-Projekte“, im zweiten Semester sogar „größere Projekte“.

Der Projektunterricht und seine Einsatzmöglichkeiten

Bevor ich einige von den Aufgaben, die ich im Unterricht eingesetzt habe, vorstelle, möchte ich einen kurzen Überblick über die Entstehung und Entwicklung, über die Einsatzmöglichkeiten des Projektunterrichts geben und dabei auch die einzelnen Phasen des Projektunterrichts wie Vorbereitung, Verlauf, Präsentation und Beurteilung unter die Lupe nehmen. In der Fachliteratur wird John Dewey als Begründer der Projektmethode erwähnt. In seiner Auslegung bedeutet Projektunterricht eine Alternative zum Fachunterricht. Aus eigenen Erfahrungen kann man am wirksamsten lernen, die

„denkende Erfahrung“ bekommt bei ihm eine zentrale Rolle. Kilpatrick erweiterte den Gedanken mit dem Begriff des „praktischen Tuns“. Von Borowski wurden die Merkmale des Projektverfahrens zusammengefasst. Von diesen würde ich jetzt den „mehrdimensionalen Lernbezug“ hervorheben. Die Projektarbeit, die eine Integration von Motivation, Information, Übung und Anwendung verwirklicht, kann den Lernprozess und das Langzeitgedächtnis sehr positiv beeinflussen. (in: Zielske, 2008). Bei den Projektaufgaben müssen reale Lebenssituationen bewältigt werden, so kann man die Kluft zwischen Schule und Leben, Theorie und Praxis schließen. Nach Klippert können in einem realen Projektverfahren alle handlungsorientierten Methoden integriert werden. Bevor die Aufgabe erteilt wird, kann z. B. Brainstorming äußerst motivierend wirken. In der zweiten Phase kann das gesamte Spektrum des Erfahrungslernens (Erkundungen, Befragung, Rollenspiel, Problemanalyse) eingebaut werden. (Klippert, 1988) Bei der dritten Phase können Mind Maps sehr hilfreich sein, die dem strukturierten Denken helfen. Bei den Zwischenphasen, Diskussion im Plenum, Besprechung der bisher erreichten Ergebnisse, Bestimmung der weiteren Aufgaben und Wege, können Teilprodukte wie Präsentationen, Briefe, Texte, Kommentare usw. entstehen.

Vorstellung einiger Projekte

Zur Dekoration der Seminarräume benötigten wir Posters, Plakate, Landkarten, Reisekataloge, Prospekte, Stadtpläne, Broschüren. So haben wir beschlossen, per E-Mail vom Tourismusamt der deutschsprachigen Länder welche anzufragen. Vor der Lösung der Aufgabe wurden die Merkmale des offiziellen Briefes studiert, einige Anfangs- und Abschlusssätze, Höflichkeitsformen und Ausdrücke notiert. Dann kam das Formulieren des Briefes, die Suche nach der entsprechenden Adresse. Nach einer Besprechungsphase, damit nicht alle an dieselbe Adresse schreiben und damit keine groben Fehler im Brief bleiben, wurden die E-Mails versendet. Als die Antworten und später die Pakete mit den Plakaten, Prospekten, angekommen sind, war die Freude groß. Der Seminarraum wurde dekoriert. Natürlich wurde es nicht vergessen, sich schriftlich für die Sendung zu bedanken. Einige Studenten haben sogar die Dekoration fotografiert und im Anhang ein Foto über die schön gewordenen Seminarräume und Korridore geschickt. Das zweite Projekt wurde für Kleingruppen geplant und dauerte mehrere Wochen lang. Wir haben beschlossen zu Adventzeit nach Wien zu fahren. Dazu wurden Kleingruppen mit 3-4 Personen gegründet und alle Gruppen haben dieselbe Aufgabe gelöst. Am Ende haben wir die Resultate verglichen und die beste Reise ausgewählt, bzw. aus den guten Ideen gemeinsam die beste Reise zusammengestellt. Die Teilaufgaben lauteten u.a.: Das Tagesprogramm zusammenzustellen, mit Hilfe eines Stadtplanes und diverser Internet-Seiten, die über die Sehenswürdigkeiten von Wien berichten, die Route zu planen, Eintrittskarten zu buchen, nach dem Preis zu fragen, Studentenermäßigung zu verlangen, eine Unterkunft zu suchen (Jugendherberge, Studentenheim, Pension in der Nähe von Wien) für den Fall, dass wir eventuell 2-3 Tage bleiben. Briefe zu

schreiben- dazu haben Studenten meistens überhaupt keine Lust. In diesem Fall, als sie Anfragen an verschiedene Beherbergungseinheiten geschrieben haben und es wirklich darum ging, die günstigste Unterkunft in Wien zu finden, haben sie mit großer Lust die Anfragen geschrieben. Wieder im eigenen Namen und wieder waren sie überglücklich, als sie die Antworten erhielten. Diese wurden verglichen und wir mussten uns zwar so entscheiden, dass wir uns nur eine eintägige Reise leisten können, aber für das nächste Jahr wurde schon eine längere Wien-Reise mit Übernachtungen geplant. Schloss Schönbrunn, Belvedere, Hofburg, Hundertwasserhaus oder Kunsthistorisches Museum? Wann, wohin und wie viel wird es kosten? Alles musste perfekt geplant werden. Als das ganze Programm zusammengestellt wurde, haben wir Werbetexte formuliert und ausgedruckt, Plakate gemacht und aufgehängt und im Kreise der anderen Studenten für unsere Reise Werbung gemacht. An der Tagesfahrt nach Wien haben 48 Personen teilgenommen, sie war ein echter Erfolg. Das letzte Beispiel, das vielleicht die größte Motivation bedeutete, war das Verschicken von Bewerbungen für das bevorstehende Sommerpraktikum. Die Aufgabe wurde in Partnerarbeit gelöst, da die Studenten nur ungern alleine zum Auslandspraktikum reisen. Sie fühlen sich zu zweit viel sicherer. Zuerst haben wir nach Praktikantenangeboten gesucht, dazu haben wir stundenlang im Internet gesurft. Es wurde im Plenum über die gefundenen Praktikantenstellen berichtet: was für eine Arbeit wird angeboten, welche Tätigkeitsbereiche, was für Eigenschaften werden erwartet, wie ist die Vergütung, was alles bekommt man gratis, wie viel muss man arbeiten, usw. Aus den Angeboten haben wir eine ganze Liste zusammengestellt, die Vor- und Nachteile der einzelnen Angebote ausgewertet und die Studenten haben sich einige Praktikantenstellen ausgewählt. Danach mussten sie einen Lebenslauf schreiben, dazu haben wir das Europass-Formular benutzt, es wurde dann von allen Studenten gespeichert, damit sie es später wieder verwenden können. Die Bewerbung war der nächste Schritt, sie musste einmal grob formuliert werden, mit den wichtigsten Einführungs- und Abschlusssätzen. Später konnten die Studenten diesen Brief je nach ausgewählter Arbeitsstelle ein wenig umformuliert verwenden. Lebenslauf, Bewerbung, Motivationsbrief, Photos, Zeugnisse wurden im Anhang in einer PDF-Datei geschickt mit ein paar höflichen Zeilen per Mail. Bis zum Ende des Semesters haben viele der Studenten eine Praktikantenstelle in Deutschland bekommen und noch dazu die offizielle Briefform gelernt. Bei welcher Gruppe konnte man den besten Lernerfolg erreichen? Selbstverständlich habe ich das Resultat meines Unterrichts gemessen. Die Ergebnisse der Klausurarbeiten, die in den drei Gruppen pro Semester geschrieben wurden, haben mir die Bestätigung geliefert, dass die Projektmethode wirklich effektiv ist.

Abb. 3: Testergebnisse (eigene Konstruktion)

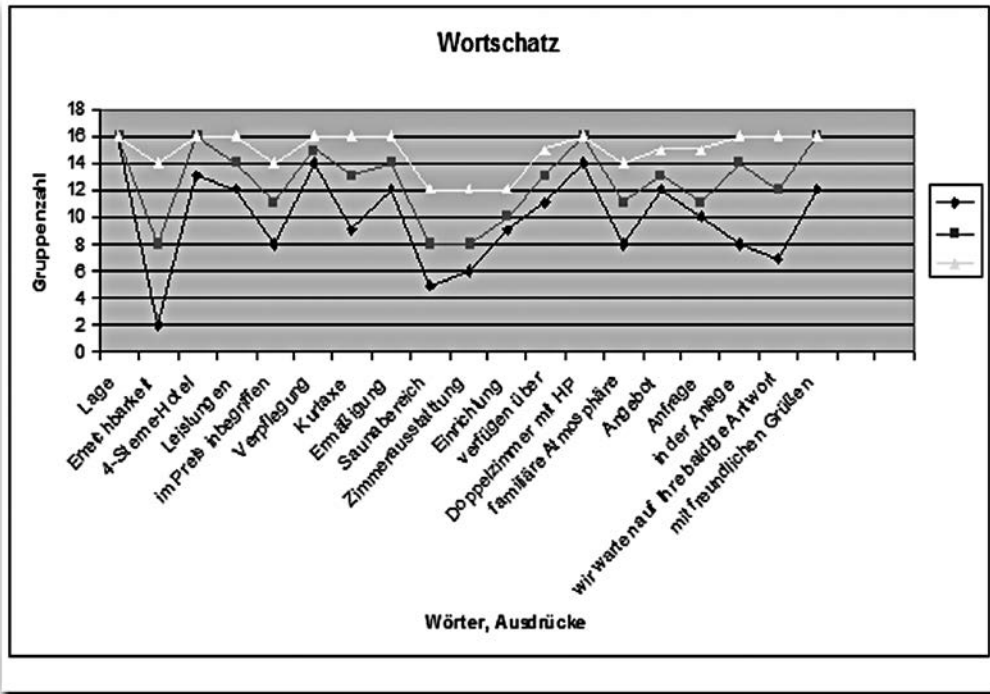
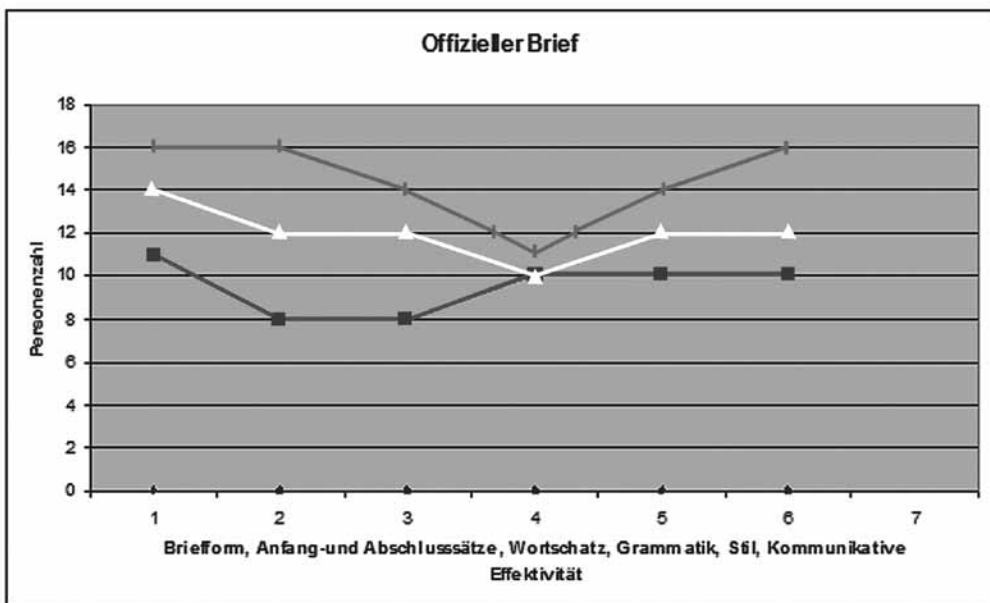
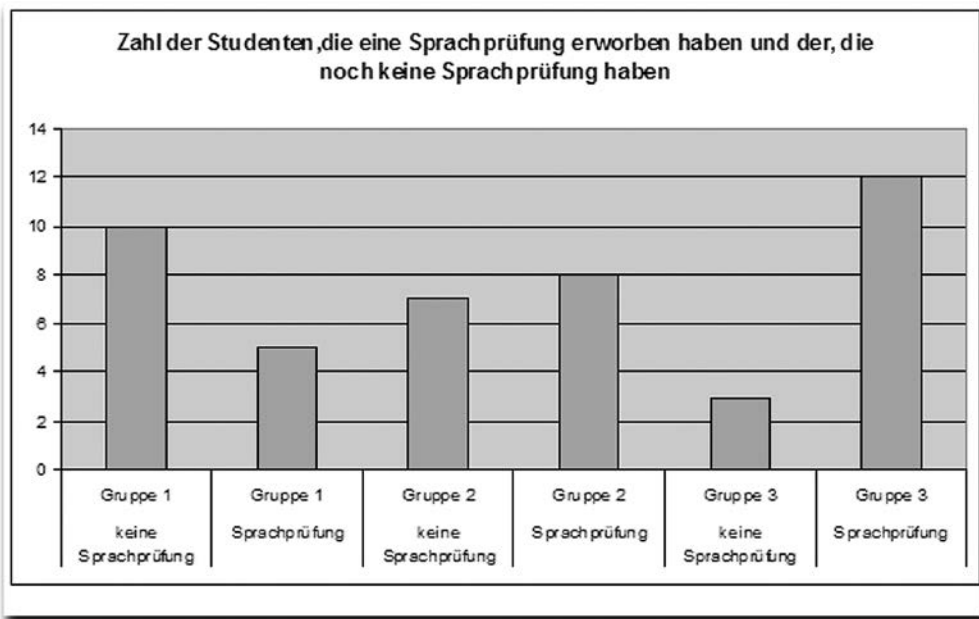


Abb. 4: Test der Schreibfertigkeit, Formulierung einer Anfrage



(eigene Konstruktion)

Abb. 5: Zahl der erworbenen Sprachprüfungen in den Studienjahren 2009-2011



(eigene Konstruktion)

Aus den Ergebnissen dieser drei Beispiele ist eindeutig zu sehen, dass der Lernerfolg bei der Gruppe 3 der beste war. Dadurch, dass die Studenten in die Geschehnisse miteinbezogen werden, dadurch, dass sie die Beschäftigung mit der deutschen Sprache nicht als langweiliges Lesen und monotones Lösen von grammatischen Aufgaben erleben, erlernen sie die Sprache ohne sich dabei zu bemühen. Das Erlernete bleibt länger und tiefer fest, weil sie persönliche Erlebnisse im Zusammenhang mit den einzelnen Wörtern und Ausdrücken haben, selbst an dem Geschehen und an dem Resultat ihrer Arbeit interessiert sind, von Stunde zu Stunde zu demselben Thema zurückkehren, also ständig wiederholen müssen. In dem Sinne möchte ich in Zukunft in allen meinen Seminargruppen mit weiteren Projekten arbeiten. Die Projektmethode wird bei den Studenten immer beliebter, sie wirkt motivierend und ist sowohl beim Spracherwerb als auch bei den Sprachprüfungen mit wesentlich besseren Resultaten verbunden.

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GYAKORLATORIENTÁLT FELADATOK ÉS PROJEKTMUNKA

A SZAKNYELVOKTATÁSBAN

Szabóné Kedves Ágnes

Absztrakt

A tanulmány a felsőfokú intézményekben folyó szaknyelvoktatás aktuális kérdéseit vizsgálja. Egyéni tapasztalatok, felmérések és kutatások alapján elemzi a szaknyelvoktatás jelenlegi helyzetét, a szaknyelvi vizsgákat, a hallgatók és a szakma elvárásait a szaknyelvi képzéssel kapcsolatban. Arra a kérdésre keresi a választ, hogyan tehető hatékonyabbá a nyelvi képzés, hogyan lehet a hallgatókat valóban használható nyelvtudáshoz segíteni. A szerző ismerteti az elmúlt három évben három különböző szemináriumi csoportban végzett kísérleteit, amelyek során különböző tananyagokkal és tanítási módszerekkel dolgoztak. Röviden áttekinti a projektoktatás elméleti és módszertani hátterét, felhasználási lehetőségeit. Bemutat néhány konkrét példát azok közül a gyakorlatorientált feladatok és projektfeladatok közül, amelyeket a kísérleti csoportokban kipróbált. Végül összegzi a három kontrollcsoportban elért tanulási eredményeket, melyek meggyőzően támasztják alá a projektalapú szaknyelvoktatás hatékonyságát és ösztönző hatását.

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Seit 1998 unterrichte ich die Fachsprache Wirtschaft und Tourismus. Vor meiner Arbeit als Deutschlehrerin habe ich auf zahlreichen Gebieten des Tourismus gearbeitet. Bis zum heutigen Tage pflege ich aktiven Kontakt zu der Tourismusbranche. Als Sprachlehrerin untersuche ich die Möglichkeiten eines effektiveren Fachsprachenunterrichts, der die Erwartungen der Tourismusbranche besser erfüllen kann. Meine Forschungsgebiete sind: Projektaufgaben im Fachsprachenunterricht, Wirkungsanalyse von Studienreisen, gute Praxen aus deutschsprachigem Raum.

Publikationen: www.igyk.pte.hu, www.mtmt.hu

HOW DO CULTURES COMMUNICATE THEIR VALUES? – SCHOOLS OF THOUGHT ON CULTURE AND THEIR INTERPETATIONS OF CULTURAL VALUES

NATALIA KISS

Abstract

The Roma have long been a minority group in Hungary. Over the years, they have endured various negative stereotypes and continual discrimination. Much of this prejudice has derived from misconceptions held by the mainstream society concerning the nature of the Roma lifestyle, within that their value system. This paper aims to examine how different interpretations of the concept of culture affect the way cultural values, held by socially defined groups of people, are perceived, understood, and communicated. The findings of a qualitative research done in the context of a village school have revealed a great variety of thoughts and assumptions Roma parents and teachers have about each other's values.¹

Introduction

The world is becoming increasingly interconnected due to technology and communication systems. Frequent contacts between different cultures raise significant issues, and this complexity in societies' demands answers for more and more questions. Communication between cultures is not a new phenomenon – it has existed since human history began (Jiang, 2006; Niedermüller, 1996). “What new is the systematic study of exactly what happens when cross-cultural contacts” and interactions take place (Samovar & Porter, 1985.1).

Intercultural communication research generally has an “intrinsic interest for diverse people and offers new frontiers to cross and explore” (Kim & Hubbard, 2007. 224). As will be seen, this exploration can be conducted with various epistemological and methodical approaches and theories, with culture defined either as characteristic of countries, or “based on gender, social class, age” etc. (Gudykunst & Kim, 1997. 18-19). Based on a qualitative research, this study aims to explore how the concept of values is understood, and what role cultural values play in intercultural encounters. The context of the research is a small village and its school, the participants are Roma parents, children, and teachers.

1 Lector: Dr. Zsolt Huszti PhD

Concepts of culture

Modern anthropologists approach the concept of 'culture' in two different ways. Some interpret culture as being mainly symbolic; "relating to ideas, norms and values", while others extend the concept to "behaviour and material objects" as well (Alvesson et al., 2004. 276). The first view refers to a kind of organised system of knowledge (Keesing & Strathern, 1998), while the second sees culture as the "pattern of life within a community- the regular recurring activities and material and social arrangements characteristic of a particular human group" (Goodenough, 1961.521). Culture is in the realm of observable phenomena 'out there' in the world (Keesing & Strathern, 1998).

These different approaches raise issues of whether culture should be seen as public or private, and where it can be found. Below, the different concepts of culture presented by various schools of thoughts are introduced to show how they approach these issues.

Sociocultural systems

As indicated above, theorists are divided as to whether they view culture as an integral part of the social system or as a "conceptually separate, ideational system" (Allaire & Firsirotu, 1984.195). The first typology claims that "the cultural and social realms are integrated into a sociocultural system" (Allaire & Firsirotu, 1984. 195), and behaviour is actually the manifestation of these. The sociocultural school views culture as "the man made part of the environment" (Herskovits, 1948), which means culture entails not only material man-made objects, such as houses and cars, but also social institutions, for example marriage and education, each regulated by laws, norms and rules (Smith & Bond, 1993). These, as well as values, beliefs and social schema are transmitted from one generation to another as part of cultural socialisation (enculturation), and affect ways of thinking and behaviour. As Kroeber and Kluckhohn claim, culture constitutes "patterns explicit of and for behaviour acquired and transmitted by symbols, constituting the distinctive achievements of human groups' (Kroeber and Kluckhohn,1952.13).

Functionalists view culture as a sociocultural system. In this conception, culture is an "instrumental apparatus" which helps "to cope with specific problems in the course of basic human need satisfaction", and manifestations of culture, e.g. institutions, function to serve the same aim (Allaire & Firsirotu, 1984.197). Treating culture as an essence, functionalists strive to find those subconscious fundamental assumptions and beliefs which control the members of a society (Schein, 1985). Hofstede calls these patterns "the software of mind" with sources that "lie within the social environments in which one grew up and collected one's life experiences" (Hofstede, 2003.4).

Culture as systems of ideas

The opponents of the sociocultural school emphasise a difference between social and cultural systems, though they acknowledge their interdependence (Allaire & Firsirotu, 1984). This conceptualisation sees culture as a system of ideas or as “inferred ideational codes lying behind the realm of observable events” (Keesing, 1974, as cited in Allaire & Firsirotu, 1984. 197). The ideational system uses culture to refer to the “organised system of knowledge and belief whereby people structure their experience and perceptions, formulate acts, and make choices between many alternatives. This sense of culture refers to the realm of ideas” (Keesing & Keesing 1971. 20).

The cognitive school views culture as a “system of knowledge” (Keesing & Keesing, 1971. 20) that includes “learned standards for perceiving, believing, evaluating and acting” (Allaire & Firsirotu, 1984, p. 198); namely what people in a society must know to function well. As an early representative of this tradition Goodenough claimed:

“A society’s culture consists of whatever it is one has to know or believe in order to operate in a manner acceptable to its members... Culture, being what people have to learn as distinct from their biological heritage, must consist of the end product of learning: knowledge ... by this definition, we should note that culture is not a material phenomenon; it does not consist of things, people behaviour, or emotions. It is rather an organization of these things that people have in mind, their models for perceiving, relating and otherwise interpreting them” (Goodenough, 1964. 36).

More recent cognitive conceptions of culture retain the tenet of culture as knowledge. This kind of knowledge is not a collective one, but is comprised of the knowledge of the individuals belonging to the same community. Applying concepts from schema theory, culture is seen as internal mental organisations or schemata used for interpreting the world and deciding how to behave or how to say things (Holland & Quinn, 1987). Schemata are built up from discrete items of knowledge gained from experience (Holland & Quinn, 1987). Cultural schemata are created through socially mediated experiences e.g., schooling, place of living etc. which enable members of the same culture to make similar interpretations of social interactions (Holland & Quinn, 1987).

The symbolic or semiotic school provides “an interpretive view of culture as a system of shared meanings and symbols” (Allaire & Firsirotu, 1984, p. 198). It views culture as a public creation, saying that meaning is created in public (Geertz, 1973). Therefore the semiotic school rejects the internal private view of culture. For Rohner (1984) culture is an organised system of meanings attributed by individuals to the persons and objects which make up the culture. It is through culture that people can “communicate, perpetuate, and develop their knowledge about attitudes towards life. Culture is the fabric of meaning in terms of which human beings interpret their experience and guide their action” (Geertz, 1973. 145). This implies that culture is not in “people’s heads but in the ‘meanings’ and ‘thinkings’ shared by social actors” (Allaire & Firsirotu, 1984. 198). “Man” says Geertz, “is an animal suspended in webs of significance he himself has spun; I take culture to be those webs’ (Geertz, 1973.5). For the semiotic school, to understand human thought

it is necessary to focus on the “public traffic in significant symbols” (Geertz, 1973:45). Therefore, if the aim is to understand cultural meaning; behaviour and social institutions, it should be understood in the context- in the symbolic systems (Geertz, 1973)- in which they occur. The semiotic school believes that instead of searching for cultural universals, researchers should find the variety within culture.

Critical theories

Critical post-modernist theories generally reject the notion of culture as a static, homogeneous entity. Advocates question whether there are clear boundaries between cultures, as individuals can be members of many different communities and can have multiple identities. Consequently, talking about national characteristics becomes questionable. Critical theories of culture take a more dynamic perspective on culture and reject the idea that language, culture and national identity should be treated as one (see e.g. Scollon & Scollon, 2001). As, for example, Jensen (2004) argues, the poststructuralist approach places the individual, rather than the culture in the centre of attention. “It is the interpretations of the participant that determine what culture the person belongs to” (Jensen, 2004, 4). Critical views on culture generally claim that research should not focus only on describing and explaining interactions, but should examine the underlying power relations (e.g. Bourdieu, 1991), cultural self-perception, and identity (among others Collier & Thomas, 1988) etc.

Values

Cultural values are often identified as a source of conflict in intercultural encounters. The concept of ‘value’ in the functionalist approach to culture appears as a determining factor that shapes people’s initial expectations, attitudes, and behaviours toward approaching for example work or conflict (e.g. Hofstede, 1980; Ting-Toomey & Oetzel, 2001; Schwartz, 1994). Thus values are inevitable elements of traditional models of culture (e.g. Kroeber & Kluckhohn, 1952; Hofstede, 1991; Trompenaars & Hampden-Turner, 1997). In the most elementary model, often referred to as the ‘iceberg model’, culture consists of two levels: level of values as an “invisible level”, and a “visible level of ... behaviour and artefacts” (Dahl, 2004. 4). Hofstede (1991, 2003) in his ‘onion model’ outlines four layers with values at the core which form the most hidden layer of culture. Values are defined as “broad tendencies to prefer certain states of affairs over others” (Hofstede, 2003. 8), as they are seen as “a learned organization of rules for making choices and for resolving conflicts” (Rokeach, 1973. 161).

In Trompenaars and Hampden-Turner’s (1997) model, basic assumptions are at the core level. These core values are thought to influence other visible values in the above layers. Spencer-Oatey (2000) proposes to combine basic assumptions and values claiming that it is difficult to separate the two. In her model, the inner core of culture (basic assumptions

and values) is encircled by the level of beliefs, attitudes and conventions. Samovar and Porter put values and beliefs, under the umbrella term of cultural patterns by which they mean “a system of beliefs and values that work in combination to provide a coherent, if not always consistent model for perceiving the world” (Samovar & Porter, 2004. 50). Beliefs are viewed that “serve as the storage system for the content of our past experiences, including thoughts, memories, and interpretations of events” (Rogers & Steinfatt, 1999, as cited in Samovar & Porter, 2004. 48). They are accepted as truths claimed to affect individuals’ actions and behaviour in communication. Beliefs are viewed as the basis of a person’s or a nation’s values (Samovar & Porter, 2004). However, the functionalist view emphasises rather the domain of the collective. On these grounds, values are seen to be transmitted by family, media and school, therefore tend to be relatively stable (Samovar & Porter, 2004). Thus functionalists believe that cultures can be characterised by holding specific values.

The post-modern and constructivist traditions, as well as modern philosophy of language criticise the assumption that the term ‘value’ would refer to one specific concept, namely that there would be a standard, normative meaning of this word. Below, two entirely different approaches to understanding meanings of values; Hofstede’s (1991, 2003) value analysis and Nordby’s (2008) philosophical analysis will be discussed and their implications will be drawn out.

Hofstede’s approach to value analysis

Hofstede’s (1980) initial work aimed at addressing the lack of a “universally applicable framework for classifying cultural patterns” (Dahl, 2004, p. 14). Applying the inductive technique, first he surveyed a great number of participants from various cultures about their work related values and preferences in life. After this, he rank-ordered the cultures in terms of each dimension and outlined a map of clusters of cultures based on these dimensions. The first four identified dimensions of cultural variability were: *low-high power-distance, masculinity-femininity, individualism-collectivism, and low-high uncertainty avoidance* (Hofstede, 2003). In later studies (1991) he added the dimension of *Confucian Dynamism* or *Long-Term Orientation*.

Hofstede (2003) argues that both ends of each dimension exist in all cultures, but one tends to dominate. “*Individualism* pertains to *societies in which the ties between individuals are loose: everyone is expected to look after himself or herself and his or her immediate family. Collectivism* as its opposite pertains to *societies in which people from birth onwards are integrated into strong, cohesive ingroups, which throughout people’s lifetime continue to protect them in exchange for unquestioning loyalty*” (Hofstede, 2003. 51, italics original). Communication in individualist-collectivist cultures is claimed to be influenced by norms and values. Uncertainty avoidance expresses how people of a certain cultural group can tolerate ambiguity and uncertainty (Hofstede, 2003). Cultures’ *high or low-uncertainty avoidance* defines the roles of norms and rules to

guide behaviour (Hofstede, 2003). Hofstede claims that in low uncertainty avoidance cultures norms and rules are not followed as strictly as in high uncertainty avoidance cultures. Deviant behaviour is not acceptable in high uncertainty avoidance cultures, and members tend to strive for consensus in, for example, conflict situations (Hofstede, 2003). *High-power distance* cultures tolerate inequality, with people accepting power as part of the social order. *Low-power distance* cultures, in contrast, value equality (Hofstede, 2003). Members of low-distance cultures believe in the legitimate use of power. The major difference between *masculine and feminine* cultures is how gender-roles are perceived in a culture. Members of cultures high in masculinity value “recognition”, ambition, and “assertiveness” (Hofstede, 2003. 79-85). People belonging to cultures high in feminine value, show preference for good “relationship”, “cooperation” and “security” (Hofstede, 1980, 2003. 82). Hofstede developed the *long-term orientation* in life dimension with Michael Bond (Hofstede & Bond, 1988). In this fifth dimension, which is linked to Confucius, long-term orientation is characterised by “persistence, ordering relationships by status and observing this order, thrift, and having a sense of shame”, whereas short-term orientation is characterised by “personal steadiness and stability, protecting your ‘face’, respect for tradition” and “reciprocation of greetings, favours, and gifts” (Hofstede, 2003. 165-166).

Hofstede’s merit is- as Dahl notes- that his work “reduces the complexities of culture and its interactions into five relatively easily understood cultural dimensions” (Dahl,2004.14), but it offers only a general analysis. It treats cultures as nations, so the possibility to get to know more about, for example, different ethnic groups within a culture, is limited. Furthermore, these dimensions suggest that cultures are relatively stable and static. Hofstede’s (1980) concepts, particularly individualism/collectivism, have become the most frequently discussed and researched concepts (e.g. Intercultural Conflict-Oetzel et al., 2007, Ting Toomey’s Face Negotiation Theory 1988, etc.), so Hofstede’s work has undoubtedly had a great influence on cross-cultural research, which- as has been argued above- tends to rely on comparisons of cultures ignoring individual differences.

Nordby’s modern philosophical approach to values

Nordby (2008) applies a rather different approach in examining the role values play in intercultural communication. Relying on modern philosophical discussions on language and communication (i.e. Wittgenstein’s philosophy of language), he argues that “intercultural communication typically fails when communicators have different values and do not acknowledge that culturally shaped values are different from beliefs and thoughts” (Nordby, 2008, para. 1). Furthermore, he claims that being aware of this difference is crucial to understand challenges in intercultural communication.

To support his arguments, Nordby (2008) states that factors that make successful communication difficult are; people’s differing beliefs about the world, and lack of knowledge about each other’s beliefs. In specific situations these can provoke different

reactions. One possible reaction is ignoring the other person's beliefs and experiences by simply ascribing beliefs to the person s/he would not have. Another reaction – quite typical of those who “have the power to act in the way they think is reasonable” (2008, para. 7) - is to attempt to change the other speaker's belief by providing information in the hope of rearranging the person's factual beliefs and existing knowledge. Nordby (2008) claims that in many conflict situations, those in power believe that it can be rationally explained how to “conform to new ways of living” (para. 7). However, as Nordby (2008) argues, it is people's personal values shaped by specific social and cultural history, not beliefs, that tell how they want to live their lives, and “these values are not subjects to rational discussion” of what is true and what is false (para. 7). To support his argument, he has interpreted the word ‘value’ in three different ways.

In the first interpretation, “values are properties we ascribe to actions we think of as ethically good or wrong” (Nordby, 2008, para. 16). However, when people make “ethical statements”, they “do not believe that actions are good or bad” in relation to some ordered rules (para. 17). In this formulation, values are very similar to beliefs about what norms to follow and what behaviour to expect from others in interpersonal relations. Nordby (2008) argues that the fact that people may ascribe different values to actions, which can cause cultural disagreement, does not present such a great challenge in communication, as these values are closely related to beliefs.

In the second interpretation, values can be understood as “general concepts people believe in” (Nordby, para. 18). These concepts of value (e.g. justice, democracy, etc.) are norms which are approved by most people. These fundamental concepts of value “are always experienced as valid from a particular point of view, woven into a person's social and cultural context” (Nordby, 2008, para. 18). Again, these values do not present a communicative challenge that is different from communicating beliefs, as understanding what general concepts a person believes in is “equivalent to understanding what beliefs he has” (para. 19).

However, in Nordby's opinion, the third concept of value may present real communicative challenges, as it is “intimately connected to the ways individuals wish to live their own lives” (Nordby, 2008, para. 19). This personal feature, as he argues, is quite the opposite of those values which are understood as abstract concepts people generally believe in. Personal values are fundamentally connected to ‘forms of life’, e.g. “the activities in which we like to participate” (Nordby, 2008, para. 19). This means that “understanding what personal values an individual has is not equivalent to understanding what general values he believes in” (para. 20). Consequently, to understand an individual's personal values means being aware of “how he wishes to live his life” (Nordby, 2008, para. 31) and this has nothing to do with understanding what thoughts and beliefs that person has. As Nordby (2008) claims, in order to communicate successfully, participants in interactions must share many beliefs. However, personal values are subjective in nature, so they are not related to general beliefs about the world, rather to individual preferences. So they cannot, and do not necessarily have to be shared.

Nordby's (2008) analysis is particularly thought provoking for the research context as it shows that the assumption behind the attempt to make minority groups realise that

they should conform to the majority's way of living, this way giving them 'new beliefs' about how they should 'like' to live their lives, is fundamentally mistaken. The other problem with this type of strategy, as Nordby (2008) argues, is that it ignores individuals' personal values as well as "the way these values underlie their form of living" (para. 37). Criticising one's personal values can be experienced as offensive, since the way people live their lives, and the way they want their environment to be is an important part of their personal identity. In real-life it is crucial to focus on these values, as it is these that people express while communicating with others.

Nordby's (2008) arguments, grounded in philosophical views, provide practical insights into everyday intercultural interactions. They focus on the individual, thus avoid generalisations about cultures. The issue of how participants in the interaction can become aware of each other's beliefs and personal values will be further elaborated through the findings of research. As has been shown, personal values are communicated in interactions, and they tell a lot about how people want to live in their environment.

The research context

The field work for this research was conducted in a small village situated in the south of Hungary. The population of the village is about 4200. The number of Roma inhabitants can only be approximated, as only a small proportion of the expected Roma presence (which is commonly cited as 30% of the total village population) registered themselves as Roma prior to the Roma minority local government election in 2010.

According to the accounts of local teachers, around 60-70% of the 170 students at the village school are of Roma origin. Based on annual reports made by school management for the village council, the school displays many of the problems characteristic of institutions with a high concentration of Roma students: poor school performance, discipline problems, poor living conditions of the students, the low qualification of parents, a high rate of parent unemployment, and inadequate cooperation between families and the school (Balázs & Halász, 2000; Balázs, 1998 ; Simon, 2009).

The number of students at the school has been decreasing steadily since the late 1980s. In the earlier years, as many as 400 students attended the local school as a result of school district regulations through which it was compulsory for the inhabitants of a particular district to attend an appointed school. By the end of the 80s, regulation of this kind became more lenient (Forray, 1989), and when free school selection was introduced in 1985, many parents chose to register their children at schools in the nearby town. With this change, mainly those families who could not afford the travel expenses continued to attend the village schools, as larger institutions were considered more prestigious. As a large portion of underprivileged families were Roma, so too were the majority of the students left attending the school.

Teachers had difficulty coping with the challenges of what seemed like a greater Roma presence in the classrooms. This resulted in heightened disciplinary problems

and eventually led to a decline in the standard of education at the school. In a form of ‘spontaneous segregation’, the increased percentage of Roma students at the school led to a mistaken perception that the village school was exclusively Roma. Coupled with the increasingly negative reputation of the school, these generalisations would contribute to the isolation of the school within the community, and fewer non-Roma students felt encouraged to attend.

The aim of the qualitative research done in the village was to know what defines the negative relationships between Roma parents and school, what factors affect them and how parents and teachers account for them. Another important issue was to see to what extent these factors are related to perceived cultural differences. Last but not least, how this relationship is manifested in the communication between Roma families and teachers.

The participants for the interviews were selected from the parents of the children studying at the school. In many instances the families had children of different ages and could provide some information about the kindergarten, as well as the primary school itself. The group of participants was partly “purposively” selected (Cohen et al., 2000). The selection criteria was based on the background knowledge of how Roma themselves differentiate between each other, and which relied on their origins and socio-economic status. This categorisation is manifest in different neighbourhoods of the participants. Most teachers interviewed have been teaching at the school for more than 25 years. In the followings, some key elements of the findings concerning values will be outlined, focusing only on family values and belief in the value of education.

Parental involvement- different interpretations of “caring”

Based on the interviews with teachers, the issue of parental involvement was identified as one source of negative relationships. This concept appears with intensity and frequency in teachers’ interpretations of problems concerning the majority of Roma families, with an emphasis placed on the word “caring”. Analysing the interviews has shown that teachers and parents interpret the meaning of “caring” in different ways.

For teachers caring means that parents should try to meet the expectations and requirements of the school. Teachers expect children to be clean, disciplined, and bring all the books and other equipment with them when coming to school. Caring for teachers also means to show interest in the child’s education. The following quotes show how teachers construe the meaning of caring from the school’s perspective.

Extract 1.

T4: *They [Roma children] are undisciplined in the sense that they do not keep to the rules- the school regulations [házirend]- they are late, it’s because they do not take these things seriously. [Being late] ten minutes or 15 minutes doesn’t matter, so this kind of sloppiness is still typical. And yes, when we tell the parents that these ten minutes will add up to a lesson skip, and that this absence must be justified... well these are things parents don’t take seriously at all. But then I can’t say that there are notorious truants, like there used to be.*

Ex. 2.

T1: *They are not concerned about the child. Full stop. That's it. Those [children] who do well, in their case it does not matter whether they are Roma or not. Their parents are here in parent-teacher meetings. Those we have problems with, well, it's difficult to involve them- to involve them in doing something for the child.*

Ex. 3.

T2: *There are no parents. The child is discourteous and dirty... They do not have school equipment, but I see signs of it [lack of parental background] in that the children are unkempt, dirty. You see, there is no checking, there is no responsibility..... There is no parental support. They don't just not check the child's learning, they don't check the child at all.*

Examination of the perceived causes of not caring about children reveals not only macro factors affecting Roma parents' behaviour i.e. unemployment, but also underlying assumptions about cultural differences as well. These differences are seen rather in the value system, and some assumptions tend to be based on stereotypes and prejudice. They are as follows: not working is a lifestyle, Roma parents and children do not have aims, and families have a lot of children for the purpose of getting more money.

Ex. 4.

T3: *The problem lies in that a generation has grown up who are at home and try to live on the dole. And what the children see is that you can get by this way, and that this is a lifestyle for them. This is a serious problem which we could have called a kind of motivation earlier- a way of saying that you must study, but now they do not have goals. Or they have the kind of goals like "I will get by as my mother and father, who can get by family allowances and unemployment benefit". This is the model they want to follow. The parents are still in bed when the children leave for school.*

Ex. 5.

T5: *Going to school and studying there, is like going to work. It supposes a kind of daily routine. But children, who have never seen their parents getting up early and going to a workplace, they lack this experience. How could I make them feel responsible if they have never seen a good example?*

Ex. 6.

T1: *Many parents can't bring themselves to check whether the child has brought his or her school bag to school. They are not concerned about their children. As a third party, we sometimes feel that they give birth to get more family allowance. They do. There are more and more of them [of these children]. We do not feel that parents care about them, they expect everything from institutionalised education.*

The interviews also shed light on how the parents perceived the concept of caring, and what family ties and their children meant to them. Stark contrasts can be found between how teachers and parents interpret parental roles, from the affection parents demonstrate towards their children, to observations made in connection to hygiene issues. All Roma participants expressed the value of devotion to their children. The first example is that of a mother who was ready to fight against the local government to avoid her child being

sent to a special school. The second interviewee gives account of the ways in which Roma parents are different from Hungarian ones.

Ex. 7.

F8: *I will do everything for this child. They can take my house from under my feet, but if I say I'm not going to let him go to that special school, because this or that person says he is stupid, then I won't, whatever happens.*

Ex. 8.

R: What is your dream or wish?

F6: *Jesus, for all the four [children] to stay with me. I wish I could make such big rooms that all of them would be here. One big bathroom- but this is only my dream. I'm a princess who is dreaming (she laughs).*

R: Your son has been admitted to a secondary school, so he is on his way...

F6: *Yes, but you know, he spends most of his time with his father, and I'm really worried that he will bring him up in a Hungarian way, not in the Roma.*

R: What does this mean?

F6: *I don't want to offend you, but Gypsies love their children more than Hungarians. We are more concerned for them. When my son was in hospital we were told that we mustn't stay with the child at night. We fought for the right to stay there, most Hungarians just went home. My partner slept on a rubbish bin, because there wasn't any room in that little hospital ward. When there is trouble, it's enough for us to sleep two/three hours- When it is for the child. When we sleep together, it does not just mean that we don't have beds, but because we want to make them feel that they are safe.*

Although teachers accuse parents of a lack of caring, they contradict themselves by acknowledging close family ties at the same time. It should be observed, however, that teachers usually expressed this observation with some negative connotation.

Ex. 9.

T1: *The only occasion when parents do not hesitate for a second to enter the school building is when they believe that their child has been subject to psychological or physical abuse, or has experienced an injustice, be the abuser a teacher or a student. Well, this is the time when they are self-assured [öntörvényű] and want to do justice themselves.*

Education – belief in the value of education

The other issue, which is closely related to the concepts of caring and parental involvement, is how parents approach the question of education and learning. The parents unanimously claimed that they find learning important. Opinions only varied in respect to the extent to which they felt competent in supporting their child. This reveals that parents' upbringing has, in turn, led them to feel unequipped to motivate and support their children. Interviewees often referred to their own parents, who did not demand educational achievement from them.

Many parents cited the problem of the premature development of Roma girls, referring to it as a tradition deeply embedded in their culture. Though parents all expressed a wish to avoid girls getting married or having children too early, they seemed to see it as an unavoidable factor that will affect their lives. Though not always satisfied with their children's results, parents seem to be satisfied with their children's abilities.

Ex. 10.

R: How important is your children's learning for you?

F7: *Learning is very important. I always tell them that they learn for their own sake, not for me. Of course it doesn't mean that I wouldn't be proud if one day she was called up in the school year closing ceremony and got given a reward in public. I would be so proud of her. My parents were not really bothered whether or not I studied, but this is not so now.*

Ex. 11.

R: How do you try to encourage them to study?

F2: *We tell them every day to learn. This little one studies well, the elder started well too, but you know, no matter how hard we wish for it, it doesn't matter that we dream about their education, if they are 16 or 17 it all becomes very difficult. We don't know what they are going to be when they grow up, what we are going to get from them.*

The following, longer quote, illustrates the complex feelings of the parents towards school and teachers. On one hand, they are proud and grateful for the feedback they get for their well-disciplined children, on the other hand the hidden suspicion of prejudice and discrimination lingers beneath their statements. The sentence referring to the letter "c", meaning Gypsy "cigány", seems to have been engraved in many parents' memories from their kindergarten and school experience. This alludes to the times and practice in the socialist era, when in school registers, a student's ethnic identity was indicated by a small letter "c" next to their names.

Ex. 12.

F5:Mother: *I'm satisfied with them [children]. They are loved by teachers, because they are polite. They [teachers] greet me when we meet and tell how polite they are. Both of them [both children]. Of course, that letter „c” will always be there in front of their names. They don't have to be like this one or that one, they must be different. Neither of them is a genius, but we want them to be thought of as different from the others. That's all I can give to them. Perhaps, hopefully they will have an easier life.*

Even in cases in which the child's achievement at school is not a problem, the interviews reveal that challenges are encountered by these families as well. Gifted Roma children have to face feelings of separation, overcome socioeconomic hindrances and have to have the courage to compete with others. Parents of children like these have to sacrifice a lot for their children's success.

Ex. 13.

R: How have your children become such excellent students?

F11: *I don't exactly know. It is probably because she [the eldest] had classmates she had to compete with. Her siblings just followed her. But we used to tell them as well, that they have to study. Now they schedule when and who gets the room first to be on their own to study, because they don't have their own rooms. They are very good children.*

As it has been shown, there are families in which the children are successful at school. These parents have not had a superior education to the others, but demonstrate more trust in the system. This finding is supported by examining how the parents, whose children do not do well at school, interpret the causes of their children's failures. Their "attribution theories" root in perceived discrimination and distrust. In terms the use of frequency of certain expressions, it is very interesting to note that parents often mention the word "kiemel" which implies not only being rebuked, but also of being discriminated against and excluded. The issue of perceived discrimination appears with high intensity, and particularly amongst families where there are a lot of problems with the child's behaviour or where there are children with special needs.

Ex. 14.

F2: *Once they shut my son in the toilet in the kindergarten because he misbehaved. It wasn't just him, but they punished only him. He is always singled out [mindig őt emelik ki].*

Ex. 15.

F3: *It is not only him who is mischievous. He is always singled out [kiemelik] in front of the others, then of course he refuses to give in. The psychologist didn't understand why the child was sent to him.*

Analysis has detected contrary views on the values of the education system on the part of parents and teachers. The most striking finding is that although teachers tend to blame parents for the child's negative attitude to school which consequently manifests in behaviour problems, teachers are the ones who have the least belief in the worth of education.

Ex. 16.

T2: *They [the Roma families] can't find an aim. This what the system should help with. I had a conversation with a Roma father during a consultation hour [fogadó óra] last year, and for example we talked about a lot of things, and he is a miner, and he works. And we talked about- he has older children too- and he can't persuade his child [the one who goes to the school] to study. I told him, that I believe it, because if the two of us now discussed what perspectives he can offer the child, what to study, what he should say... What should the child study? Let's list some work places and trades in this country...*

Ex. 17.

R: How are these good learners received by the society later?

T1: *We have students with extension [kitűnő tanuló]. They will not be accepted [by society]. Somebody can be an excellent student here. These 34 years have taught me... They are not accepted. Or s/he won't succeed later. I don't think they ever will....*

Shall I tell you the reality? As I see it, you can't break out of this circle; it is very hard to break out of this circle. I don't think they'll be accepted more easily.

Teachers' opinion about the Roma people's aspirations emphasises the perceived cultural differences and hidden prejudice which are disguised in generalisation. The striking feature of the following quote is that the teacher admits that she cannot envision any prospects for these children while at the same time attributing all the responsibility to the system and the parents rather than the teaching profession.

Ex. 18.

T1: *They [children] don't have a vision of the future, and though it can't be said that their culture means they would have a vision of the future, this is typical of not only Roma people. Those living from day to day, well they don't have a vision of their future. And their parents don't either. Neither the parents nor the children do. We teachers can say to parents that it [the situation] would just be worse if they hadn't made their children study. But those who have- still don't have a job, so those who don't learn won't have a job anyway. So the problem is that these children, for example, don't understand the concept of getting a salary. Has the family allowance arrived? This is what the usual conversation is about. They go as far as to ask me "Do you get family allowance?" So they have no idea how people get income, and if they face any problem the solution they come to is asking for allowance. This is very typical.*

Parents, with a few exceptions, generally tend to be more optimistic about the value of education and about the prospects of their children. They do not have high expectations but simply express the wish that their children achieved more than they have.

Ex. 19.

F4: *The truth is that I always tell them: They do not study for me, they study for themselves. They do not choose a trade for me, but for themselves. I did not have a say in what they liked. I know that in today's world, it is very difficult to find a job, and this is impossible without learning. If they have ideas then I support them, so that they can achieve what I couldn't. So that he has what I didn't have.*

The next transcript gives a very succinct summary of how one interviewee interpreted why it is that he finds education important for her daughter's future. This includes his experience of what it means to be deprived of valuable things and to be humiliated, but to stand up in spite of it all.

Ex. 20.

F1: *They can take away everything from you, your clothes, your bag... your hair can be cut, your skin can be cut, but your mind cannot be taken away from you*

Discussion

As shown earlier, both teachers and parents assume differences in each other's value systems, which affect their relationship to a great extent. The core of this is their different beliefs about the world, and lack of knowledge about each other's beliefs (Nordby, 2008).

Teachers shaped by their specific social and cultural history tend to ignore Roma people's beliefs and experiences, and with their assumed power attempt to change these beliefs by giving instructions and trying to guide parents how they should live. My findings support Nordby's (2008) assumption in that it is people's culturally shaped personal values, not beliefs that tell how they want to live their lives, and they cannot be rationally discussed or negotiated. This is exemplified in the different interpretations of caring which reflect Super and Harkness' (1997) claim that parents may "hold particular ethno-theories about raising their children", and these may differ from those of teachers to a great extent (as cited in Hauser-Cram et al., 2003. 814).

As already discussed, Nordby (2008) construed the concept of value on three levels. In the first interpretation values can be seen as good/bad descriptors people attach to actions they "think of as ethically good or wrong" (para. 16). Teachers, with their explanations of why they find parents so careless, actually ascribed values to parents' unemployment ("staying at home"), suggesting that parents find "not working" ethically a good thing. Teachers also questioned Roma families' values in having more children by suggesting that they just procreate to get more money.

Nordby's (2008) second interpretation is that values are understood as general concepts people believe in. The concepts of "respect", "trust" or "equality" are held to constitute norms for all participants involved. Roma parents often referred to the "red blood" all people have, but expressed their doubt whether this was evident for everyone in the society.

The third interpretation of the concept of 'value' is connected to how individuals want to live their lives (Nordby, 2008). Criticising personal values is generally experienced as offensive, because they are part of the person's identity. A good example of this is when Roma parents were disparaged by teachers for going out to Roma dance events at the weekends, even more, taking their children, instead of staying at home. The mother whose greatest pleasure was dancing and to show off with his three year old son's dancing skills, found the teacher's comment really insulting. Similarly, the personal values behind spending money while it lasts on nice clothes, food, and on children, is viewed critically by teachers. Personal values show a great individual variety, but with some interest and effort, in conversations, teachers could find out what the other's personal values are, as a good basis for trust building.

Hauser-Cram and her colleagues claim that there are no studies on how the "teachers' perceptions of the values inherent in cultural and socioeconomic differences" affect their judgements (Hauser-Cram, 2003. 814). My research has shown that the perceived mismatch between the culture of teachers and the culture of children's families has negative consequences on the relationships, and the effects of these perceptions on their judgements of families can be observed in teachers' attitude to parents.

Conclusion

Through the exploration of the negative relationship between Roma parents and school, a number of sources for dispute were identified. Amongst these were the central themes of parental involvement; perceived differences in value systems; opposing views on education; issues of prejudice and negative stereotypes.

The issue of parental involvement appeared with high levels of both intensity and frequency in the school teachers' perceptions of the problems concerning the majority of Roma families. The underlying misunderstandings connected with this concept included differing interpretations of some words, like for example 'caring'. The core of this misunderstanding was explained with the tendency for teachers to ignore Roma people's beliefs, values, and experiences, thus the meaning of such concepts are not construed on a shared cultural basis. Furthermore, it was observed that teachers with their assumed power often attempt to change Roma parents' personal values (Nordby, 2008), instead of trying to understand their underlying motives.

As for how the society treats them, Roma parents tended to report problems of deprivation, prejudice and negative stereotypes. The research has shown that parents have a strong belief in the value of education. It was generally teachers who did not believe in the worth of education, attributing this to the assumption that Roma people would never be accepted as equal members of this society.

Perceptions of discrimination turned out to play a large part in forming the opinions of the Roma families. Parents generally assumed that prejudice and discrimination continue to exist in the classroom. Parents were found to be quick to attribute any problems experienced by their children on the prejudice of the school. Without confirmation from the teachers of a mutual respect and sincere concern for their children's wellbeing, the parents struggle to trust the teachers. "No educational system anywhere develops or exists independently or remains unaffected by its social or historical roots. The policies, practices and perspectives of the prevailing dominant culture influence educational content and approach" (Le Roux, 2002. 37). The consequences of misunderstandings concerning values of these cultures are far reaching. Mutual interest and understanding would be the key to ensure peaceful cooperation.

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HOGYAN KOMMUNIKÁLJÁK A KULTÚRÁK ÉRTÉKEIKET?
- A KULTÚRAÉRTELMEZÉS ISKOLÁI ÉS KULTURÁLIS ÉRTÉKSZEMLÉLETÜK
Kiss Natália

Absztrakt

A romák már hosszú ideje élnek kisebbségként Magyarországon. Ez idő alatt állandó negatív előítéletekkel és diszkriminációval kellett szembenézniük. A többségi társadalom által róluk kialakított képet legtöbb esetben életformájukra és értékrendszerükre vonatkozó meggyőződések formálják. A tanulmány bemutatja, hogy a kultúra fogalmának különböző értelmezései hogyan befolyásolják egy társadalmilag meghatározott kulturális csoport kulturális értékrendszerének értelmezését és annak kommunikálását. Egy Tolna megyei kistélepülés iskolájában végzett kvalitatív kutatás eredményei rávilágítanak arra, hogyan látják és értelmezik egymás kulturális értékrendszerét a roma szülők és a többségi társadalmat képviselő tanárok.

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WINE ROUTES IN THE SOUTH TRANSDANUBIAN TOURISM REGION

ANDREA MÁTÉ

Abstract

The study describes the relationship between wine and tourism based on the example of the South Transdanubian Tourism Region. In this region with the collaboration of great wine and cultural tourism su p.ies and uses of tender's sources that have been done to create the wine routes. The experiences and difficulties of wine routes define other development tasks. The wine routes need cooperation between regional, civil society, business and local authorities.¹

1. The South Transdanubian Tourism Region

Based on the 1007/1998. Governmental decision 9 tourism regions and their related Regional Tourism Committees were formed. The boundaries of the tourism regions partly exceed the stiff boundary line of the counties and so appointed areas appearing along the tourism attraction zones in order to develop the branch more efficiently (Figure 1.). The South Transdanubian Tourism Region is consisted of Baranya, Somogy and Tolna counties with the exception of the settlements belonging to the Balaton tourism region.



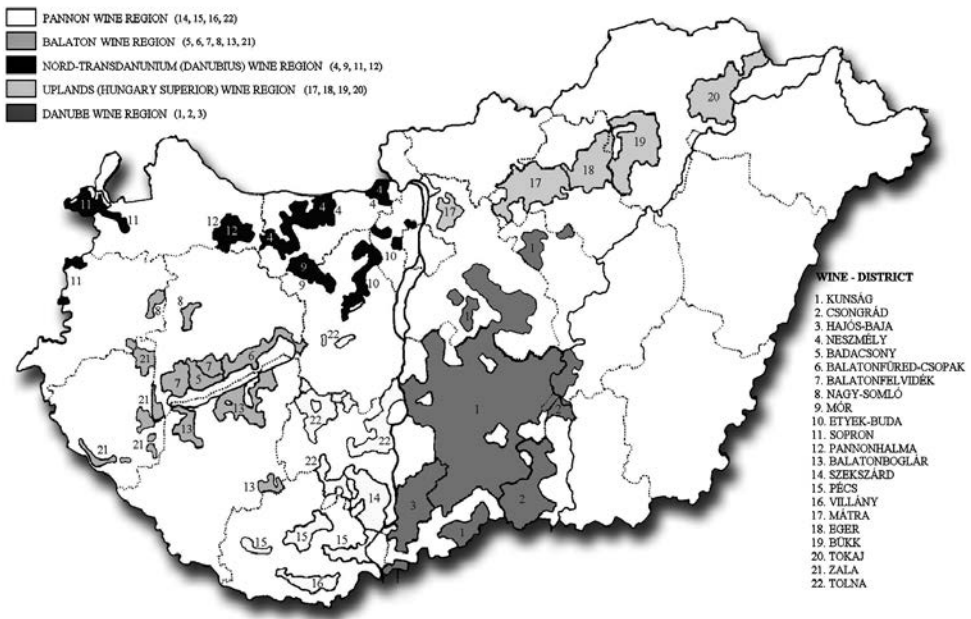
Figure 1. The 9 tourism regions of Hungary

1 Lector: Dr. Zsolt Huszti PhD

(Source: https://etr.bkf.hu/ETR/Urlapok2.spx?tab=é&doktar_id=2767716)

2. Wine tourism attractions in the South Transdanubian Tourism Region

The tourism region has 4 significant wine districts – Szekszárd, Tolna, Villány and Pécs – which partnership created the Pannon Wine Region in 2008 (Figure 2.). The first wine route of Hungary was established in the South Transdanubian Tourism Region in 1994: the Villány-Siklós wine route. Owing to the PHARE Pre-Accession Funds, four further wine routes were established in the region. The Pécs-Mecsek Wine Route was established in 2005 but the first service qualifications were effectuated only in 2007 so the wine route



is still under development.

Figure 2. Wine-districts and planned wine regions of Hungary in 2009

(ed. MÁTÉ, A.) (Source: <http://www.hnt.hu>)

For the successful operation of wine tourism a wide range of attractions should be disposable based on which program packages or wine routes could be organised. These attractions are to be found in the Region. The favourable geographical position determines the accessibility of attractions. The hilly image increases the aesthetic values of the grape growing area, the south-south east slopes' higher hours of sunshine provides a more favourable microclimate to the development of grape and tourism as well. The wide range of wine selections (Hungaricums and world brands) confirms the value of the

areas' wine industry traditions and also the successes on innovation and modern methods and procedures. From the point of view of wine tourism the presence of cellars, wine press houses, cellar villages and wine houses is outstanding in a wine region. These buildings are the most important locations for visitor hostelling on which there is a great need visiting and getting to know since those are the most determinable experiences for visitors.

Beside the basic wine tourism attractions numerous complementary attractions should be deployed with which visitors will be inspired to extend the time of their stay. Apart from this due to the different fields of interests of the target groups there is a great need for diverse supply. The historical memorials, museums, provincial houses, craftsmen and festivals in the wine regions provide these experiences for the wine tourists. The uniqueness of the attractions are strengthened by the area's variegation of gastronomy.

The structure of the wine tourism attraction inventory was aggregated paying respect to the domestic (SZABÓ, G. 2001, 2006, SARKADI, E.- SZABÓ, G.- URBÁN, A. 2000) and international (HALL, C. M.- JOHNSON, G.- MITCHELL, R. 2002) scientific literature by my own conception. Instead of the traditional inventory based on natural, cultural and special division, I group the attractions from the point of view of wine tourism from a different thematic aspect. Creating grouping the travel motivations of the tourists were the main dominating factors. Based on these I handle the wine tourism attraction inventory as a "WINE-CUL-TOUR" inventory, in which there are three priorities: wine, culture and activity. The elements of the attraction inventory are collected together in table 1. I consider it to be important that the wine tourism attraction survey should regularly be refreshed, since in wine industry and tourism significant changes are experienced year by year and also the values of the wine tourists can change due to globalisation and actual fashions (Table 1.).

Table 1. The wine tourism attraction inventory: "WINE-CUL-TOUR" inventory (ed. MÁTÉ, A. 2007)

Wine	Culture	Activity (Tour)
wine-district, growing area relief, exposure; climate; grape-plantation; grape genus; mood	cities history; mood; entertainment facilities	nature hiking protected areas; study trails; established hiking trails
wine industry fame; accessibility; cellar villages, traditional cellars, wine press houses; newly built wine houses, spectacle cellars; wine industry technology; personnel; capability for visitor reception	villages relaxed environment; rural hospitality; traditions; folk art values	cycling cycling routes parking lots, rental
	museum, exhibition multimedia technology; visitor friendly, multi lingual	equestrian, horse coaching horse stables, horse schools, coach
wine expert fame; personality	gastronomy land-specific food; local products	golf golf courses
wine product quality, wine trademarks; results of wine competitions; selection; uniqueness; price	event, festival folklore, ethnic; harvest fairs, conference; gastronomy; musical, art	health and experience spas health service, cures diverse experience elements
wine route quality; selection; programme packages; receiving environment, receiving capacity; accessibility	historical monuments fortress, castle; churches	water sports yacht ports; water tour rest places
	handcraft exhibition workhouse	amusement parks children-centred entertainment
	legend; famous persons	other hobby activities fishing, hunting

The interconnection between wine and culture is very strong since the historical-cultural values for centuries of the wine-district's settlements and their population of the area strengthen the uniqueness of the wine region. From historical times till nowadays the Danube was a strategic route along which the Romans built the limes and in the middle ages there was a warpath around. The Rác (Serbian) people arrived to the area also along the Danube pushed by the Turkish troops and so carried the Kadarka grape and cultivation culture with themselves which is determining even today in the façade of the Szekszárd wine-district and the production of the bikavér (bull's blood). In the 18th century the German settled to Tolna and Baranya counties spread the Kékfrankos which is the most current type for producing red wine of the area. The German cellar villages fulfil and can fulfil in the future a determining role in advancing wine tourism. Events with national and international importance and the varied gastronomy is based on the multiethnic (Hungarian, German, Serbian, Croatian, Sekler, Turkish) traditions. The spice paprika producing region along the Danube (Bogyiszló) and the fishes of the river strongly affected the region's gastronomy (e.g. Danube fish soup). Festivals of international importance are based on the varied and

multi ethnic traditions such as the Folklore Festival Along the Danube (Szekszárd-Kalocsa- Baja) and the „Busójárás” (Mohács).

The most neglected parts of the attractions of wine tourism are the elements connected to activities, in turn the natural environment of the area, the Mecsek and the Villányi-Mountains and the Danube provides adequate aptitude. The reason for the restricted relation of wine tourism and active tourism is the low configuration of infrastructure and the visitors' low awareness of the programs. The protected area of the Danube-Drava National Park (Gemenc, Béda-Karapancsa) and the oxbows of the Danube provide numerous opportunities for tourism. The Gemenc forest apart from the study trails and hiking trails can be ranged over by small trains and small boats as well, it can be roamed by bicycle on both banks of the river and also water tours can be organised in the area. The national park is also a paradise for hikers, fishermen and hunters. In Fadd-Dombori (one-time Danube oxbow) and in the marked strands possibility for bathing is provided. Numerous medicinal baths (Harkány, Tamási) ensure an opportunity for relaxation in the environment of the wine districts.

3. The features of the wine route

Wine and wine culture are attractions which are increasingly popular among Hungarian and foreign tourists. Wine tourism is one of the special types of agro-tourism which is built on the show and sale of local products (e.g. the wine). The supply for tourists is formed by the producer or wine growing facility, which implies wine tasting, wine sale and related accommodation. (SZABÓ, G. 2001)

The transformation of the supply of wine regions into thematic routes may assure the demonstration of assets and wine tourism the most effectively. Wine routes are a complex tourism product which provides interesting experience through a specific supply. It can be operated with success if the participants recognize their common interests and are able to think in terms of a region. It is a feature of the wine route that it is based on common local efforts, operated as an organized unit and it offers qualified services. The products of the wine route are introduced into the market by the help of communal marketing.

The wine route is not only the line or series of visited cellars but it is a framework of a programme created according to certain aims which can be organised in very versatile aspects, on which it can create unique experiences adapted to the special needs of the visitor (Table 2.). These programmes are raising the significance of the wine region's consciousness of culture and gastronomy concerning the domestic and foreign visitors. (MÁTÉ, A. 2007a, b, c, d, 2009)

Table 2. The supply elements of the wine route (ed. A. MÁTÉ)

Services based on wine			Supplementing supply			
<i>Cellar with wine tasting</i>	<i>Cellar with dining</i>	<i>Holiday at a wine producing farmer</i>	<i>Local product shops</i>	<i>Guest catering</i>	<i>Accommodation</i>	<i>Programmes</i>
Wine tasting	Wine tasting	Wine tasting	Wine shop, vinoteca	Restaurant	Hotel	Cultural events
Cellar visit	Cellar visit	Cellar visit	Store of agrarian products	Inn	Pension	Sports events
Wine selling	Wine selling	Wine selling		Jerry (Csárda)	Village tourism	Leisure programmes
	Guest catering	Guest catering		Winery	Camping	Handicraft programmes
		Accommodation				Events
						Hiking in nature

(Source: SZABÓ, G. 2002, *Common Charter of EU Wine Roads*. 2006, MÁTÉ, A. 2009 ed. MÁTÉ, A.)

The wine route provides a wide regional supply- the market of consumers is delivered to the door, meaning that products may be sold directly, without any freight cost. The wine route and the expectations of the tourists exert a favourable influence on the improvement on the image of the settlement, contribute to closing the gap between regions and to the development of small settlements in an unfavourable position. This complex tourism service creates jobs on the site, as a result of which the rate of unemployment will reduce and participants will earn supplementary revenues. The activity will contribute to the involvement of the environment conscious thinking and regional cooperation, and the members of the local society will establish relations among one another. (SARKADI, E.- SZABÓ, G.- URBÁN, A. 2000, SZABÓ, G. 2002)

Several conditions have to be met for the formation of the wine route and its operation in the long run. It is a basic condition that the route be established in a wine region, the wine route can be toured and offer aesthetic experience. The wine route guarantees the quality of products and services, providing protection to consumers as a result. The qualification assures that guests may enjoy the same high level servicing at each service provider. The qualification system extends to opening hours, the methods of receiving the guests, the equipment of the service provider, the professional knowledge and language command of employees, the types of the wines offered and several other factors. It provides a refined and well-arranged environment and appropriate availability. The goal of the wine route is similar to the targets of the local society, which are aimed at guarding and protecting local assets, facilitating the

development of the society and contributing to the retaining of the population. Wine routes require the cooperation of the population, entrepreneurs, civil organizations and municipalities since they will jointly benefit from economic and social yields.

Successful management of wine routes can accede to eliminate regional development disparities and can start the development of settlements with disadvantaged status. This organisation receives alternative and complementary income for the attendants and indirectly provides employment to the nearby population so the population-retaining ability of the settlements could grow. Wine routes advance the recovery of the economic and the tourism market, the formation of environment-conscious approach and the preservation and sustaining of the traditional settlement structure. Wine routes demand the contact creating activities and cooperation of entrepreneurs and settlements so they launch regional cooperation. (HALL, C. M.- JOHNSON, G.- MITCHELL, R. 2002)

4. The Wine Routes of the Region

4.1. The Szekszárd wine route

The Szekszárd wine route belongs to the classical wine routes, the whole route can be travelled continuously. Out of the 15 settlements of the wine region only 6 disposes of qualified service providers, but besides them several settlements take part as advocating members in the functioning of the wine route. The centre of the wine route is Szekszárd assuring the majority (76%) of the services of the wine route. This concentration has been continuously growing ever since the wine route was created. Since 2000 the number of qualified service providers almost doubled. The wine route's reputation is established by wine producers that have achieved domestic and international success (SZABÓ, G. 2003). This benefit is further enhanced by the service providers of the wine route, who were awarded the title „Wine Producer of the Year”. (Ferenc Vesztergombi 1993, Ferenc Takler 2004) A disadvantage of the wine route is that it cannot present the heritage of such a cellar village like the Siklós-Villány wine route. The row of cellars in Sióagárd could compensate for this lack of experience, however, this potential is still to be exploited. Instead of cellar villages, the wine route welcomes visitors with spectacular wine houses on the hillsides. The services of the wine route are wide in range: wine tasting, wine sale, visiting of cellars, open-air wine fountain, wine tresor, pálinka (special Hungarian brandy) tasting, local dishes, renaissance cuisine, ethnographic collection, artisans and craftsmen, various events, accommodation at wine producers, in hotels or in castles (MÁTÉ, A. 2007a, b, c, d, 2009).

4.2. The Tolna wine route

The Tolna wine route belongs to the open type wine routes, since the route stages are scattered throughout the three districts of the Tolna wine region. Hence the wine route (consisting of 15 settlements) cannot be travelled continuously, but initiatives have been made at the individual settlements to receive guests. The Tolna wine route preserves the built cultural heritage of several cellar villages (Györköny, Paks, Bölcské, Dunaföldvár, Nagymányok), yet their utilization is low and their condition is constantly deteriorating. Among the present circumstances, significant reception of guests occurs in connection with local events. There are no notable wine producers along the wine route, who could raise the reputation of the region. (SZABÓ, G. 2003) Instead, two large-scale wineries accomplished more significant achievements in wine industry, however, wine tourism is present only to a very modest level in the activity of the companies. The wine route lacks the presence of small and middle-sized family wineries. The services of the wine route are wine tasting, wine sale, restaurants, boarding houses, artisan displays, horseback riding, carriage rides, various events, museums and exhibitions (MÁTÉ, A. 2007a, b, c, d, 2009).

4.3. The Villány-Siklós wine route

The Villány-Siklós wine route belongs to the traditional wine routes, so its itinerary can be travelled and it is an organic unit. It was created first in Hungary and was a model example of the South Transdanubian wine routes. Out of the 17 settlements of the wine route 11 wine district settlements and 2 settlements out of the wine district have wine route services (SZABÓ, G. 2001, 2002, 2003, MÁTÉ, A. 2007a, 2009). The centre of the wine route is Villány and Siklós, but taking into consideration the distribution of the wine route services Villány is determining (60%), while the significance of Siklós is rather small (12%). Until 2009 the number of qualified service providers grew fivefold. The wine route is brought into notoriety by the wine producers with national and international successes who also strengthen its reputation on the market. This advantage was also greatly promoted by four „Wine producer of the year” (Ede Tiffán 1991, Attila Gere 1994, Zoltán Polgár 1996, József Bock 1997) and by two „Cellar of the year” awards as well (Bock Cellar 2007, Vylyan Cellar 2008). The plantations are not divided in the wine district by the wine cellars located in the vineyards but in the borders of the wine producing villages so called cellar villages (Palkonya, Villánykövesd) were created where processing and storage was carried out. Today these cellar villages under monument maintenance are important sights of tourism. Due to the restricted visitor and processing capacity of the buildings of the cellar villages, new spectacle cellars (Wunderlich Wine Safe and Spectacle Cellar, Csányi Cellar) and enlarged and transformed wine houses were built. The more significant wine producers broadened their range of activity with hospitality and lodging (Polgár Cellar, Bock Cellar).

4.4. The Mohács-Bóly white wine route

The Mohács-Bóly white wine route is a thematic wine route which is- indicated by its name also- specialized on white wines and their connected events with the location concentrating on the Versend district within the Pécs wine district (SZABÓ, G. 2001, 2002, 2003, MÁTÉ, A. 2007a, 2009). Out of the 33 settlements of the wine district 11 settlements of the wine district and one settlement out of the wine district have wine route service providers. The number of the service providers of the settlements significantly grew in the latter years. The most of the suppliers are situated in the central settlement of the wine route – Bóly – with 25% of the total suppliers. Mohács possesses of 18% of the suppliers. The wine producers could not achieve any significant national results, however the wine route is really peculiar due to its multiethnic variegation (Serbian, Croatian, German) and their connected folk traditions and events. Due to the former producing traditions cellar villages were maintained here as well (Máriakéménd, Szederkény, Bóly, Nagynyárád), which wine tourism utilisation partly has begun. The familiarity of the wine route could be strengthened by that the „Busójárás” of Mohács has been enrolled on the representative list of the UNESCO cultural heritage in 2009.

4.5. The Pécs-Mecsek wine route

The Pécs-Mecsek wine route was established in 2005 encompassing the Pécs and Szigetvár districts of the Pécs wine district. The first qualifications were carried out in the wine route in 2007, so the least suppliers are found in this wine route. In its complementary services the German ethnic culture and the long lasting tradition of village tourism could be an important element in the future. Apparently Pécs and Mecseknádasd are the most significant settlements of the wine route. Pécs as the Cultural Capital of Europe in 2010 advanced the popularization of the wine route, however, concerning the façade of the city the role of the wine is hardly reflected. The actuation of the wine route needs further developments.

5. *Elements of the wine route cooperation*

Family undertakings provide the services. The municipality facilitates the establishment of the infrastructure background and backs the undertakings through local decrees. Communal marketing is to be formed by the municipalities, undertakings and the wine-growing communities. The associations may be in work relation with other exterior organizations though the majority of the connections are characterized by a two-way information flow:

- Authorities, supervisory bodies, unions (Ministry of Agriculture and Regional Development, National Public Health Authority, National Custom and Finance Headquarters, Institute for Consumer Protection, National Council of Vineyard Communities, etc.)

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- Wine trade organisations (Grape and Wine Production Research Institute, House of Hungarian Wines, Wine Academy, National Association of Hungarian Wine Routes)
 - Regional development (South Transdanubian Regional Development Agency)
 - Tourism organisations (Rural Tourism Association, Tourinform)
 - County and regional cultural and tourism organisations
 - Partner wine routes of the South Transdanubian Region
 - Business partners (Hungarian and foreign travel agencies, national and regional hotels, restaurants, wine merchants, wine wholesalers (with interests in the county))
 - Foreign partners (Croatian, Slovenian, Austrian, German, Italian, French wine producers, tourism businesses, associations, wine routes, regional development agencies, AREV)

The associations managing the wine routes of the region are organized from below and are independent social (non-profit) organizations. The associations make considerable efforts to establish the wine tourism based on local high quality agricultural products and to form, familiarize and market related rural tourism and other tourism services. Their membership mainly comes from municipalities, small and medium wine growers, tourism entrepreneurs, private persons and wine-growing communities.

The annual business budget of the associations is provided by membership fees and funds originating from different tenders. These revenues account for the majority of annual sales. The amount of the subsidies provided by municipalities is uncertain and very low in each year. Revenues are utilized for the drawing of certain tender resources, for the coverage of the costs of participation in events and exhibitions as well as for communal marketing and the production of promotion material.

Only the Villány-Siklós wine route employs an assistant and has a separate office which is ensured by the local governments. The other wine route organizations have no separate bureaus, they function together with other professional organizations utilizing their office infrastructure. The organizations managing the wine routes do not have own offices and they work in cooperation with other professional organizations, by making use of their office infrastructure. Owing to low revenues, wine route organizations do not hire any employee. Management duties are performed by the social agent. As a result, these associations have not defined qualification and professional requirements for their management. (*A Comparative Analysis of the Management Structures of the wine routes in the South Transdanubian Region. 2006*)

6. Objectives of Development Concerning Wine Tourism

Wine tourism, as a prominent touristic product in the region, can make its social and economic benefits affect only if its operation and organization becomes more efficient. This is not a challenge only service providers of the wine routes and local enterprises have to deal with; it would be advisable to also involve the local self-governments, the

local population and civil organizations, of course with the adequate role. The objectives of improvement can be summarized in the following items: (MÁTÉ, A. 2007a, 2007b)

- Widening the knowledge of local population about wine culture and wine route services
- Involving the population in wine route programmes and events
- Improving the marketing activity of local self-governments
- Upgrading the quality of brochures and updating their content
- Improving the quality of events and increasing their range of gravitation
- Improving and maintaining the condition of settlements, cellar villages
- Development of accessibility and infrastructure
- Elaboration of a standardized qualification system
- Arranging set opening hours at wineries
- Inventing guaranteed, regular wine route programmes, programme packages
- Increasing the capacity of accommodation in wine regions
- Training of hosting wine producers, wineries in the fields of tourism, languages and marketing
- Developing direct Internet access of the wine routes
- Development and expansion of tourist signpost network
- Organization of community marketing activity in connection with wine tourism
- Cooperation with Tourinform offices
- Efficient cooperation of civil, business and local self-government sectors

In order to gain economic success there is a need for the spatial cooperation of wine economy and tourism. The basic strategy should be built on the three pillars of quality, marketing and partnership and the development aims should be created accordingly. For the successful realisation of developments the effective cooperation of the civilian, the entrepreneur and the local government spheres and also the receptive promptitude of the local population is needed. To create the community marketing activity and to win domestic and international tender sources the different interests should be harmonized.

7. Summary

The creation of the wine routes provides numerous economic and tourism opportunities and advantages. The cooperation of the wine routes is the strongest element of spatial cooperation, so the cooperation between wine routes is much stronger than between wine districts. The tender cooperation of the South Transdanubian wine routes strengthen the newly formed Pannon Wine Region. But there are significant differences between the composition in the membership of the wine routes and the quantity and quality of the suppliers.

The Villány wine route is the most prepared for welcoming the wine tourists where the greatest number of service providers is found with a diverse supply. In the last 10 years the Szekszárd wine route was falling into line the most, strengthening especially gastronomy, but having a significant fallback concerning accommodation capacity

development. The development of the Mohács-Bóly White Wine Route has been pulled up, its supply has been pinched. The membership of the Tolna wine route is still moderate, in turn having the greatest wine district of the wine region. Its supply was gradually developed and broadened having the most outstanding results peculiarly in accommodation capacity development. The altering capacity structure of the Szekszárd and Tolna wine route could well complement each other if their cooperation will be realised. The fewest qualified service suppliers are found in the Pécs-Mecsek wine route. There is still a significant potential in the wine districts which could be utilised as wine route service suppliers and by this the quality of the wine tourism suppliers could become more reliable and verifiable.

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BORUTAK A DÉL-DUNÁNTÚLI TURISZTIKAI RÉGIÓBAN

Máté Andrea

Absztrakt

A tanulmány ismerteti a bor és turizmus összefüggéseit a Dél-Dunántúli Turisztikai Régió példáján. A turisztikai régióban a gazdag bor- és kulturális turisztikai kínálat összefogásával valamint pályázati források felhasználásával jöttek létre a borutak. A borutak működtetésének tapasztalatai, nehézségei további fejlesztési feladatokat határoznak meg. A borutak igénylik a térségi együttműködést, a civil, a vállalkozói és az önkormányzati szféra kooperációját.

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CONTRIBUTION OF THE HISTORY OF THE HIGHER TOURISM EDUCATION IN HUNGARY

ENIKŐ NAGY

Abstract

The main aim of the lecture is to present the results of research conducted within the tourism education. The research aims to assess the tourism-educational history of our country, up to the roots. The lecture seeks to answer the question that if it is attributed to the importance of education in the tourism in the twentieth century and if so, to what extent and what parallels are between the history and educational history of tourism at the same time. By a historical perspective we can say that in the past century there were measures in relation to tourism education and tourism activities had different categories by respects of education. Application of these categories can be used to demonstrate that the importance of tourism education was relevant in the past and today's higher tourism education is current as well.¹

1. Introduction

Developments of Hungarian higher tourism educational fields related to theoretical foundation, talents, intentions and factors affecting development mean the reasons which inspired me to write this study. In order to find connections between development contexts and their justification at some levels successfully, exploration of historical tourism education and its development are needed.

In the present study, I would like to give an account about my research related to the history of the higher tourism education in Hungary. In fact, the basis of my writing was that during my research I had found a book published for a technical tourism course in 1941. This incurred me a question, eventually that which level of history of higher tourism education we can talk about.

Answering the following questions and creating a picture about development process of training the tourism experts while it reached the current form. What do we mean by the teaching of tourism?

How long can we talk about higher educational training in tourism? How did the home education reach its current level? My work is important to see that sustainable

¹ Lector : Dr. Zsolt Huszti PhD

development is essential and this is also important to understand this area of science and began to understand the origin of the professional's training process too.

Might also contribute to its further development, as we know, often present problems with solutions that can highlight opportunities to study the past. When I started searching in this area I tried to create parallels between the story of tourism education and the history of tourism. Then I tried to get knowledge about the history of educational institutions. At the time I found myself in the Budapest Business School, believing, it can be said that the organized tourism training date back to its roots.

At the same time, I visited many bookstores in Budapest, where I found many old guidebooks and papers relating to tourism from 1900s. During my research I met people and talked to them who also have experiences in the tourism industry from the past century. So a picture was created in my mind and slices of this picture can be arranged in chronological order. However before speaking about the charted chronology found by myself, I would like to say some words about what is actually meant by the „higher-level” or rather higher leveled tourism education below.

2. Development of the profession ‘tourism’ and its educational needs

Tourism, being a tourist and hospitality are related words. We can meet definitions of these words in many places even from the 1900s. Definition has been already heard quite few people who are active for this topic, so I would like to skip this right now. However, the tourism work as professions we have fewer details.

The whole complex in terms of tourism, its theory and practice of dealing with the issue concluded that the importance of tourism to the area of life is very much present and have a significant effect. Who works in tourism, who is welcoming the tourists, they're serious about this profession in creating events to fulfill. In order to effectively play their role, they must be able to fulfill their duties on both theoretical and practical level too. For the people who are strangers in our country, who spend longer time in our home and came in contact with these people, be expected to work in tourism.

Béla Markos has taken a clear order of touristic activities and concretized them with the tourism and hospitality professions during his lecture in 1941. From that point when a guest is crossed over the edge of our country until the last moment, until he leaves it. He named professions, like border-police, the ticket inspector or the man who help us to rent a private residence. According to whom, what kind of activities is related to our guests, three groups can be distinguished.

The following figure illustrates these groups of people:

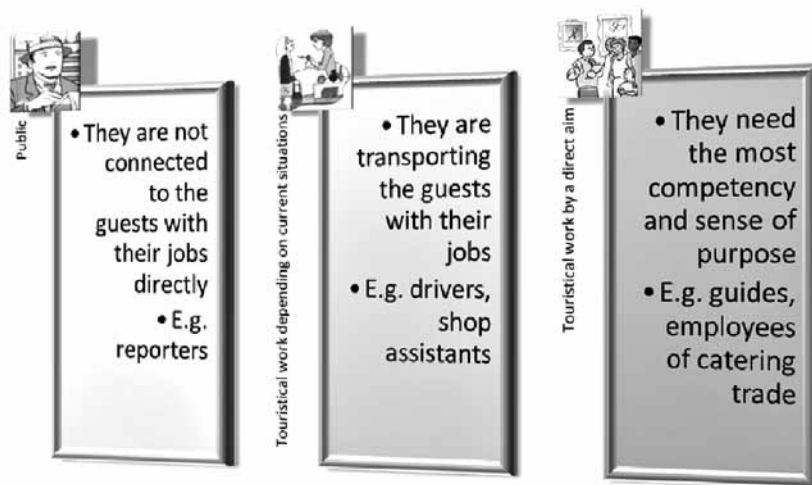


Figure 1. Groups of tourism jobs.

In the first category people can be divided, whose work has important roles by tourists, but they are not connected to them with their jobs directly. People such as reporter specialists, who have great role in tourism through their jobs, when they are strengthen the public opinion with their extensive observation.

In the second category people can be divided into those groups of people, who clearly work connected in tourism in certain situations. For a trader it is very important to what kind of behavior he or she produces, but this is maybe applied even in the police and border guards as well. They may have major impacts on tourism.

The third and perhaps the most important aspect included as the category of tourism are clearly oriented by organizations and employees who need the most expertise in tourism field. All these categories of training have educational needs. Historical perspectives, as we have already said that in 1913, there were measures in relation to tourism education. The Austrian Minister of Education is an example of regulation that were based on the years of the Hungarian National Tourist Office manager, who said that "the education could provide systematic touristic lectures for students."- said by Béla Markos on his lecture on the occasion of 1941. Educators committees have been established, courses, lecture series began to initiate creation. To answer the questions of how these ideas could have been achieved and at what level, to further research is needed to me now I have no relevant information in this regard. Reading level that I know is that training has been organized in Budapest, in the hotelier and restaurateurs vocational schools in 1913. During these lectures they tried to send tourism literacy to the workers.

So, we can say that the higher level of tourism education, as such, there is evidence that it is needed. The fact is that employees must have the skills essential to proper date even

then according to the experts- the third category- local authorities must be responsible of their actions, like the special areas of tourism, for example; training organization or coordination. In this example the absolute positive partner within the Spa and Resort Central Committee, The OHM, but also IBUSZ. Here are entered into the roles of the Budapest Chamber of Commerce as well.

3. Historical parts of tourism education

Following a short chronology I would like to present the historical facts of tourism education crawled by me.

3.1. The period of Austro- Hungarian Monarchy

During the Austro-Hungarian Monarchy we cannot speak about any colleges or universities levels of higher education in tourism in our country. Although numbers of Hungarian students took part in hotel management courses in Vienna, Bern, Switzerland and other university departments, but there were also Hungarians qualified themselves. (Zimmers, B. 1995.)

However, focusing on the training of the Hungarian Tourism, Tourist Association of naturalist mentioned in the sense. During the studying of the history of association I met activities related on education in the early 1900s.

Alignment of Mountains called The High Tatras's exploration wrote by Szilárd Schermann, the title of the book was "Szögescipők nyomai a Kárpát bércein" the book also contained the leaders of courses in mountaineering. It has been described as the second half of the 1800s and the climbing activity developed and conquered in our country.

Professional climbers have become leaders, and then management courses has been organized in 1912- 1913. Of course, the work of association was in constantly changing because of economic and political influences and during the period of the war the leaders became elders. In my opinion, these and other similar training courses meant the highest level of tourism this time.

3.2. The period from the 1st war to the 2nd war

To demonstrate that even though we cannot speak specifically classes in tourism, but in other fields the "tourist training" has great importance in the years of 1920's. Being tourist and Mountaineering official books be eliminated. During these years, has been issued a number of literatures, such as for example, Reichart Géza: The Manual Tourism (Budapest 1926), the Physical Education Collage, textbooks, encyclopedia tourism theory, and particle address or Dr. Gabor Strömpl: Map Reading (Budapest 1927). The tourism

and Mountaineering Journal, Book and Map printer RT. Issue, which is also of King Mathias Collage of Physical Education textbook. (fig. 2.), the letter reads as follows: *“More recently (1926) College of Physical Education is also taught map reading, but not in geography but also in relation with the tourism ... colleges and universities deal with knowledge of map more but reading of maps less, especially the practical part of this deal less. This is due to the prevalence of academic education rooted in “*– he writes in his book (G. Dr. STRÖMPL 1927) from these thoughts, it appears that this time has also undertaken training in the tourism-related subjects.

Of course we cannot talk about organized tourism education then is far from being non-tourism training to be tried in the important area of knowledge transfer. If we have the example of map reading, this taught by the military, the gendarmerie training, but also within the framework educating of the Hungarian soldiers.

If I go to Budapest on second-hand bookshop certainly found in the recent training related to tourism is also having knowledge of books, which also show that despite the war conditions, has the emphasis on tourism training objects. Since so many areas (e.g.: science, warfare) seems to have contained such a high level of knowledge on this topic, in my opinion, the need of organization was really felt.

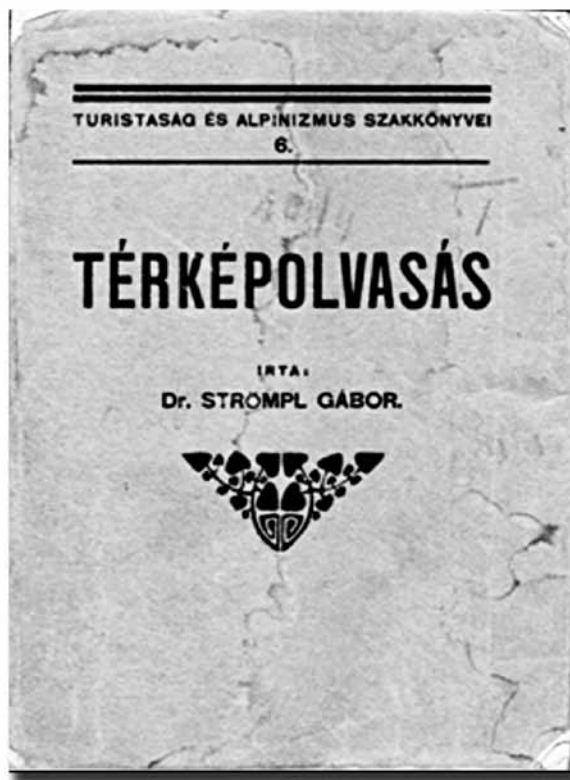


Figure 2. Course book about reading maps from 1927.

3.3. The socialist period

In the 1940's, Béla Markos, who was mentioned earlier, is among others a significant character. He was an excellent tourist professional and bibliographer. He was born in 1893. He gained a Doctor of Laws at the Science University of Budapest, than he became Bárczy István lord mayor's secretary. From 1938 he engaged mainly in the statistics of tourism and its thrift as a chief of the Tourist Office of Budapest. He delivered courses and wrote notes to the guides, later he organized the tourist education on the University of Economics. He was that, who drafted the necessary qualifications' significance of the profession.

“Our first rate professional interest, that in the tourism actively acting whole society can be saturated with knowledge's, which make them conscious and it affirms their tourist vocation, which they need not only in the course of their work ,but also the nation needs.” (Dr. Markos B. 1941), to define this thought, here is the time to follow with attention the tourism education issue.

He thought the training of the travel guides both moral view and professional view reasonable. It could be the first step of the organization, when the Trade and Transport Ministry organized and said, that just those individuals, who ended up on National Tourist Guide Course and took the exam can with guidance professionally handle, who are given the appropriate certificate by the police. (Dr. Markos B. 1941) – wrote Béla Markos in his lecture material. They made a related curriculum for the courses and based on this they organized performances and examinations. Practically, the travel agents organized special courses after these and trained their colleagues on their own courses.

This time in the foreign education it can said, that the tourist trainings in a higher level acted efficiently. For instance mentioned the Tourist Department in Rome, the Trading Academy in Berlin, where there have been trainings since 1925. In Hungary in the 1940's they reached the point that they launched at the József Nádor University of Technology and Economics, Faculty of Economics the “Tourism Administration Training courses”. Precisely the first school year, when these courses started was the 1939/40's school year, which lecture materials contain the textbook edited by Markos Béla with the title:

„Az Idegenforgalom, az 1941. évi idegenforgalmi közigazgatási szaktanfolyami előadásai” (fig. 3.) The University of Economics organized these seminaries in their own department under the direction of Dr. Márffy Ede, their public, normal teacher. He has worked on, that they do not consider work in the tourism just practical, but he found it suitable to advance it into scientific levels and theoretical inquiries. Actually, we do not know what the continuance of the tourism training development was in the next decade. I assume in the 1950's these courses were ended, since the University of Technology and Economics orientated on technical and architectural trainings in these years. Although it can be happened, that another institution or institute took over and continued these seminaries, this gives further cause to investigate.

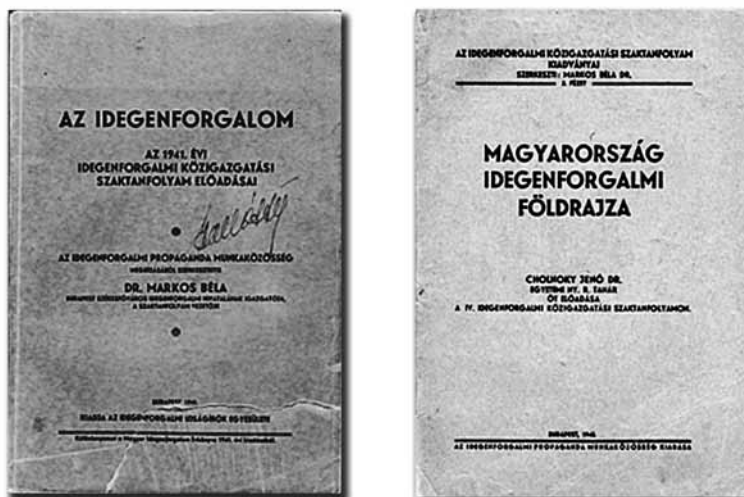


Figure 3. Tourism Course books from 1941-43.

Jumping to the 1960's, Alma mater's magazine fell into my hand, edited by László Csizmadia Dr., the General Director of the Commercial Catering and Tourism College during, my simple fact-finding survey. The Director reports factually about college courses within tourism and its evolution in these years. The year of 1963 is the first higher education institutions' year, which trains caterings and tourism professionals. Than in 1969 they reorganized the school to University of Applied Sciences. The tertiary tourism education flourished in these times, it takes exceptional interest and thus *raison d'être*.

At the same time in the 1960's IBUSZ, the travel company in monopoly, conducted trainings with a big prestige in Hungary. I had personal interview with a former worker from IBUSZ, who worked as an administrator at first, than as an accountant functioned by the firm from the 1960's to until his retirement. She said, who intended to work to the firm at that time, it had to acquire so serious materials. They set out topics and they had to specialized course accomplish, which weren't not by a long chalk intermediate level. Those who passed the exam on the professional courses, if there is occasion, they coped with other tourism or banking job, so recognition and acceptance of other workplaces evolved about the trainings of the firm.

At the end of the 70's the IBUSZ trainings finished and the Domestic Trade Training Institute took over the tasks of the trainings. Asbóth Artur was this institution's president, who is now the Budapest School of Communication's deputy president. He assumed the director's rules in the 80's. He was the founding director and majority owner of the Trade and Tourism Training Ltd, as the successor of the BTI, until 2009, today. Unfortunately, Asbóth Arthur, who was the professional organization of tourism education's prominent figure, in this year's August died, so we can't know about his work personally.

We can consider the 1980's as another newer period in the tourism education's story. The tertiary tourism education developed and organized further through the Budapest Business School in Hungary. In these years the institution's punctual name was Trade and

Tourism College, which became the tourism training's center. It built relationships with the business universities in Hungary among others with the University of Economics of Budapest and the University of Pecs. New faculties, institutes, department's conformation, the introduction of practice time, IT developments, international relationships, etc. characterized this period.

3.4. From the regime to the present

The „Tourism and Catering's bachelor's degree was introduced as the multi-cycle Bologna system of education's first cycle in 2006 in Hungary. In a former training area the catering and hotel, as well as the tourism and hotel majors were in the higher education of economics in bachelor. Merger this two major created the „Tourism and Catering” bachelor.

The introduction of the Bologna process influenced significantly the circumstances of the trainings in the tourism trainings field. We can say, that the dual training system loosened, the integration of institutions, the college and university sector in opposition to each other, the introduction of the stretched pulse credit system need extra attention from the future's view. We can't answer many questions about the future. Such hot issues, among others, that how can this training model prepare for time the listeners for the exit to the labor market, as well as to the next cycle, namely the learning on the master's degree program. According to the „Tourism and Catering” bachelor's competencies, who holds a BA degree will be suitable to cater the tasks in the tourism field and cater their job, at the tourism enterprises to carry out managerial tasks, use multilingual and different functions of communication, make international tourism-related tasks, as well as apply IT tasks. The fact, that which kind of IT skills is necessary allows raising further questions. These can also include in the tourism essential problem-solving tasks and Application level knowledge of organizational techniques in presentations and obtaining information.

In the second half of the 2000's became justified the creation of the master's degree program besides the BA. Since we (Hungarians) had to take part in the EU condition competition, we had to give an opportunity for the further development. Otherwise, the students just after the BA acquisition in another EU state would have been able to obtain the university-level degree, the higher level qualifications based on the BA. In these years between the colleges and universities became a debate in the respect of masters, since under the law of Bologna training system the start of a Master's degree is not only with university connected. After several trial and debate the Heller Farkas College of Budapest was the first, where they started the Tourism Management master's degree program. In the multi-cycle training system the tourism trainings belongs to the economics training area, inside it to the business training section. According to the philosophy of the Bologna based training 10 majors were established in the higher education of economics. The section of economics training 3 majors, the business training section 6 majors encompass and they marked as tenths the trainers

major. With this change between courses occurred, that the previous courses had to be merge. New major names are formed, in several cases double-word names, which raises the question of that how can the student acquire under same period of training the competencies and knowledge's of 2 specialties. With respect of all those, that in the business training section, which means also a new attitudinal approach, the first part of the training is same in the contact in all the 6 majors, given the necessary competencies in economics, methodology, social science and business knowledge. This arises also the geography-related question, that how can be teaching geography built into the business training, which is one of the most significant subjects of the tourism training. From historical approach looking the things, since we are talking about training in tourism even if not organized school form, the knowledge of geography is essential for tourism professionals. The beginnings of the last century's training materials are provide certainty for that belief, that the geographic (also economic) knowledge is one of the essential activity of the tourism trainings.

4. Conclusions

As a conclusion it can be stated, that the development of tourism education's most significant milestones formed in 20 per year practically. Many gaps are clouting between the periods and I feel great importance of analyzing it more. As the title indicates I could in given periods historical excerpts raise and thoughts weave about them. In order of these excerpts or with another word sections we logically bind together, as following each other links, further study and contemplation are needed. May the result so far is justified international outlook. It allows raising further questions among others, that in some areas of the old „Big Hungary”, in Slovakia today and in Rumania they classified the tourism training not to economic but to society and geographical areas. Thereby I consider demonstrable the tourism major's interdisciplinary. In addition, I think on the basis of the foregoing the tourism training from historical perspective, which is now 100-year-old, has a great importance and I trust, that it manages to take transparent the higher education system's whole development in the future.

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ADALÉKOK A MAGYAR FELSŐFOKÚ TURIZMUSOKTATÁS TÖRTÉNETÉBŐL

Nagy Enikő

Absztrakt

A kutatás célja, hogy felmérésre kerüljön a hazai turizmusoktatás történeti rendszere. A tanulmány arra a kérdésre keresi a választ, hogy a XX. században tulajdonítottak-e jelentőséget az idegenforgalmi oktatásnak-nevelésnek, és ha igen, milyen mértékben; egyúttal vonható-e párhuzam a turizmusoktatás története és a turizmustörténet között. Történeti nézőpontból tekintve elmondható, hogy már a múlt század elején is voltak intézkedések az idegenforgalmi neveléssel kapcsolatosan, és hogy nevelési szempontból is különböző kategóriákba sorolhatók az idegenforgalmi tevékenységek. Ezen kategóriák alkalmazásának segítségével lehet bizonyítani, hogy az idegenforgalmi nevelés jelentősége a múltban is releváns volt, s a mai felsőfokú turizmusképzésekben is helytálló.

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VERMARKTUNG IN DER GASTRONOMIE

JÓZSEF PICHLER

Zusammenfassung

In meiner Arbeit beschäftige ich mich mit der Frage „Vermarktung auf dem Gebiet des Gastgewerbes“. Bei der Analyse des Themenkreises werden die Anforderungen, die gegenüber den Mitarbeitern gestellt werden, wie die nötigen Eigenschaften und Fähigkeiten und die notwendige berufliche Ausbildung thematisiert.

Es werden auch die Grundregeln dieses Berufs, die langsam in Vergangenheit geraten, unter die Lupe genommen. Ich beschäftige mich auch mit der beruflichen Hierarchie im Gaststättengewerbe, die bei der Ausführung der Arbeit im Restaurant beachtet werden müssen.¹

Unser Ziel ist es, den Schülern die für die Servierpraxis erforderlichen fachlichen Kenntnisse und Fertigkeiten zu vermitteln.

DIE EINFÜHRUNG NEUER MITARBEITER IN DEN BETRIEB

Es ist eine Erfahrungssache, dass sich der Mensch noch nach langer Zeit an die ersten Eindrücke eines neuen Lebensabschnittes erinnern kann.

Dieser schwerwiegende Entschluss wird vielfach auf Grund der ersten Eindrücke gefasst.

ANFORDERUNGEN AN DIE SERVICEMITARBEITER

Um erfolgreich zu sein, müssen die Servicemitarbeiter folgende Eigenschaften erfüllen: Fundiertes Fachwissen erhöht das Selbstvertrauen. Neben der Durchführung des korrekten Service sind vor allem umfassende Kenntnisse über Speisen und Getränke notwendig. Beratung und das sprachlich richtige Formulieren von Empfehlungen sowie das Wissen um die Tischgewohnheiten internationaler Gäste sind nur einige Punkte, die ihre fachliche Qualifikation ausmachen.

1 Lektor: Dr. Zsolt Huszti PhD

MENSCHLICHE QUALITÄTEN

Nicht nur im Umgang mit dem Gast, sondern auch mit Ihren Mitarbeiter-Kollegen spielen sie eine bedeutende Rolle. Sind die Betreuung und Bedienung liebenswert, werden kleine Fehler eher toleriert. Was der Gast aber niemals entschuldigen wird, ist eine unfreundliche Bedienung.

Persönlichkeit

Zur Persönlichkeit eines Menschen zählen:

- Höflichkeit
- Taktgefühl
- Belastbarkeit
- Zuverlässigkeit
- Pünktlichkeit
- Ehrlichkeit
- Diskretion
- Loyalität

Geistige Voraussetzungen

Folgende Punkte seien besonders hervorgehoben:

- gutes Gedächtnis
- Organisationstalent
- Allgemeinbildung
- Sprachtalent (Kenntnis der Weltsprachen)
- geistige und sprachliche Wendigkeit
- Improvisationstalent

Als Servicemitarbeiter werden häufig Ferienpraktikanten eingesetzt, für die es besondere Bestimmungen gibt.

VERHALTENSREGELN IM SERVICE

In kaum einem anderen Dienstleistungsberuf spielt das Verhalten gegenüber Gästen und Kollegen eine so wesentliche Rolle wie im Servierberuf. Mit guten Umgangsformen lassen sich die schwierigsten Situationen meistern. Beachten Sie vor allem folgendes:

- Konversationen nicht unterbrechen
- Weder über Gäste noch über Mitarbeiter oder Vorgesetzte mit anderen Gästen sprechen.
- Meinungsverschiedenheiten mit Arbeitskollegen niemals vor den Gästen diskutieren.
- Essen und trinken ist natürlich für alle Servicemitarbeiter erlaubt. Den Ort entnimmt man der Hausordnung.
- „Jeder ist sich selbst der nächste“ – dieses Sprichwort passt nicht ins Restaurant. Arbeiten Sie im Team.
- Arroganz stößt auf Ablehnung – Selbstsicherheit bewirkt positive Reaktionen.

FACHAUSDRÜCKE FÜR DEN SERVIERBERUF

Die Fachsprache in der Gastronomie ist in vielen Ländern „Französisch“, aber auch englische, italienische und deutsche Ausdrücke sollte man kennen. Viele dieser Fachausdrücke erklären verkürzt den Arbeitsvorgang, helfen Missverständnisse zu vermeiden und somit Zeit zu sparen.

À la carte

Französische Bezeichnung für die Bestellung eines Gastes nach der Karte, d. h., er stellt seine Speisenfolge anhand der Speisekarte selbst zusammen. Will er das nicht, bestellt er das → „Menu“

À la minute

Französische Bezeichnung für frisch zubereitete Speisen.

À part

Französische Bezeichnung für extra, auf der Seite. Umgelegt auf die Gastronomie bedeutet es das Anrichten von Saucen, Bratensaft, Beilagen etc. in einem extra Gefäß (Sauciere bzw. Teller).

Al dente

Italienische Bezeichnung für Nudeln, aber auch für Gemüse, das innen noch kernig ist. Man sagt, es hat „Biss“.

Ambiente

Bezeichnung für den Gesamteindruck eines Betriebes, das sind sowohl die Ausstattung als auch das Service und das Angebot, die zusammen ein harmonisches Bild ergeben sollen.

Amuse gueule

Französische Bezeichnung für Appetithäppchen bzw. kleinste Speisen, die den Gaumen auf weitere kulinarische Genüsse einstimmen und die Wartezeit auf den ersten Gang überbrücken sollen. Amuse gueules werden in der Regel mit den Worten „Eine kleine Aufmerksamkeit der Küche“ serviert. Auch als Amuse bouche bezeichnet.

ANNONCIEREN

In der Gastronomie Bezeichnung für das Ausrufen der Bestellung in der Küche.

Aperitif

Bezeichnung für appetitanregende Getränke, die vor dem Essen getrunken werden. Sie können trocken, fruchtig, aber auch bitter sein. Aperitifs sind z. B. die versetzten Weine, wie Sherry, Portwein und Wermut, aber auch Anisettes (Pernod, Ricard), Bitters (Cynar, Campari) und Before- oder Pre-dinner-Coctails. Immer häufiger werden alkoholfreie Aperitifs (z. B. in Form von Fruchtsäften) angeboten.

Hygiene

Hygiene und Sauberkeit lassen viele Gäste Rückschlüsse auf die Führung eines Betriebes

ziehen. Die Verpflichtung der Servicemitarbeiter zu Sauberkeit und Hygiene bezieht sich nicht nur auf sie selbst, sondern auch auf die Handhabung von Speisen und Getränken sowie auf Serviergegenstände und Inventar. Persönliche Hygiene ist ein sehr wichtiger Faktor zur Verhinderung von Krankheiten, die durch Bakterien und Keime auf Speisen und Getränke übertragen werden können.

Neben dem gut geeigneten und qualifizierten weiblichen und männlichen Servierpersonal ist im Service vor allem eine gute Organisation des Arbeitsablaufs und der Zusammenarbeit zwischen den Personen notwendig. Diese Organisation hängt von der Eigenart und von der Größe des Betriebes ab, die Arbeitsaufgaben sind an die Mitarbeiter zu verteilen, die Gebiete müssen eindeutig abgegrenzt werden.

FRANZÖSISCHES SERVIERSYSTEM (CHEF-DE-RANG-SYSTEM)

Dieses System ist das aufwendigste und arbeitsintensivste und wird daher nur in erstklassigen Hotels und Restaurants angewendet. Die Servierbrigade ist sehr umfangreich. Sie wird nach dem Tronc-System entlohnt. Darunter versteht man die gesetzlichen und die freien Trinkgelder. Von einem kleinen Tronc spricht man, wenn die Trinkgelder nach einem bestimmten Schlüssel auf die Servierbrigade aufgeteilt werden. Der große Tronc ist der Bedienungsgeldüberschuss, der nach Auszahlung der Garantielöhne auf die Servierbrigade aufgeteilt wird.

Restaurantdirektor

Er ist der Repräsentant des Unternehmens im Restaurant. Ihm obliegen die administrativen Tätigkeiten, wie z. B. die Arbeitseinteilung, Dienstplanerstellung, Urlaubsplanung, Personalschulung und Verrechnung. Er ist Angestellter mit Festlohn und partizipiert nicht am sogenannten Tronc.

Maître d'hôtel (Erster Oberkellner)

Er hat die oberste Leitung im Service (Chef de service) und arbeitet nach den Instruktionen des Restaurantdirektors. Der Maître d'hôtel hat ebenfalls Repräsentationsaufgaben, wie Reservierung, Empfang, Plazierung und Verabschiedung der Gäste. Gibt es die Position des Restaurantdirektors nicht, so übernimmt der Maître d'hôtel seine Aufgaben.

Weitere Oberkellner

Je nach der Größe des Betriebes kann es mehrere Oberkellner geben (Zweiter, Dritter Oberkellner), die für einen bestimmten Bereich (z. B. Kaffeehaus, Restaurant, Terrasse, Halle) verantwortlich sind. Ihre Hauptaufgaben sind der Gästeempfang, die Plazierung und Verabschiedung und die Entgegennahme und Behandlung von Beschwerden (vgl. Reklamationen, Seite 60). Diese drei Positionen bilden das Management im Restaurant. Sie beschäftigen sich mit der Administration und der Planung. Die eigentlichen Servicearbeiten werden von anderen Personen geleistet.

Sommelier (Chef de vin)

Der Sommelier ist bei uns nur in erstklassigen Restaurants zu finden. Er steht im Rang eines Oberkellners und ist ausschließlich für den Verkauf und das Service von

Wein zuständig. Er benötigt ein umfassendes önologisches Fachwissen, das er sich nach seiner dreijährigen Kellnerlehre in speziellen Kursen aneignen kann. Der Schwerpunkt dieser Lehrinhalte liegt neben dem Wissen über allgemeine Getränkeempfehlungen und Verkaufspsychologie natürlich beim Wein.

Dabei spielen folgende Punkte eine Rolle:

- Weinbeurteilung und Verkostungstechniken
- Welcher Wein passt zu welchen Speisen?
- Welches Glas verwendet man zu welchem Wein?
- Kellerwirtschaft
- Weineinkauf
- Weinlagerung
- Kalkulation und Weinkartenerstellung

In Österreich gibt es derzeit vier Sommeliervereine, deren Ziel es ist, das Wissen um den Wein und um die Weinkultur in der Gastronomie zu verbessern.

Commis de vin

Er unterstützt den Chef de vin, bringt die Weine, Gläser und Utensilien wie Sekt- oder Weinkühler, Dekantierkaraffe usw. In der Hierarchie ist er dem Ersten Commis de rang gleichgestellt.

Chef de rang

Er ist für das komplette Service auf seiner Station ("rang") verantwortlich. Der Chef de rang empfiehlt Speisen und Getränke (wenn es keinen Sommelier gibt, auch Wein), nimmt Bestellungen entgegen, boniert, flambiert, tranchiert, filetiert, mariniert vor dem Gast und kassiert die Rechnung.

Demi-chef

Er ist der Stellvertreter des Chef de rang und hat denselben Aufgabenbereich. In der Hierarchie steht er zwischen dem Chef de rang und dem Commis de rang. Wenn er allein eine Station betreut, ist sie kleiner als die Station eines Chef de rang.

Commis de rang

Er ist der Gehilfe des Chef de rang und des Demi-chef. Ist auf jeder Station nur ein Commis vorhanden, so hat er in erster Linie für die Mise en place zu sorgen und während des Service für Speisen und Getränke aus Küche und Schank. Gibt es zwei Commis de rang (Erster, Zweiter Commis de rang), dann wird der erste als Commis de suite und der zweite als Commis débarrasseur bezeichnet.

Commis de suite: Er ist vor allem Verbindungsglied zwischen Küche und Service.

Commis débarrasseur: Das ist oft ein Lehrling im ersten oder zweiten Lehrjahr, der vor allem die Tische abservieren muss und für die Mise en place zuständig ist.

Apprenti garçon

Kellnerlehrling.

ETAGENSERVICE

Service auf der Etage bedeutet nicht nur das Servieren von Speisen und Getränken auf das Zimmer des Gastes, sondern es beinhaltet eine Reihe von anderen Aufgaben, die von den Mitarbeitern der Room service-Abteilung durchgeführt werden. Von allen Mahlzeiten des Tages wird vor allem das Frühstück auf die Etage serviert (siehe Etagenfrühstück, Seite 103 f.).

Zum Aufgabengebiet für die Room service-Abteilung zählen zum Beispiel:

- Das Bereitstellen von Obstkörben und Gastgeschenken für VIP-Gäste.
- Das Auffüllen und die Kontrolle der Minibar.
- Die Betreuung der Freizeiteinrichtungen, wie Swimmingpool, Fitnessbereich etc.

Für die Mitarbeiter im Etagenservice sind Diskretion und Taktgefühl oberstes Gebot. Die Privatsphäre der Gäste muss gewahrt werden.

Die Stelle des Chef d'étage ist eine Vertrauensposition und setzt vor allem Gewissenhaftigkeit, Fachwissen und Fremdsprachenkenntnisse voraus. Seine Aufgaben sind:

- Durchführung des VIP-Service.
- Entgegennahme der telefonischen Bestellung.
- Abwicklung des Service.
- Kontrolle der Mise-en-place-Arbeiten.
- Ausstellung der Rechnung
- Evtl. Kontrolle der Minibar.

Der Commis d'étage unterstützt ihn bei seinen Arbeiten.

- Durchführung der Mise-en-place (Vorbereiten von Plateaus und Room-service-trolleys) für alle Bestellungen.
- Service der Bestellungen.
- Abservieren der Plateaus und Room-service trolleys.

Die Umgangsformen und die Höflichkeit, mit der man Gästen entgegenkommt, gehören zur Visitenkarte eines Hauses. Denken Sie immer daran, wenn Sie mit einem Gast sprechen! Unter guten Umgangsformen versteht man ein korrektes Benehmen (keine Zudringlichkeit und keine Aufdringlichkeit), Taktgefühl (keine übertriebene Galanterie und auch keine Hochmütigkeit), Diskretion und Ruhe. Das Verhalten sollte nicht unterwürfig sein, dennoch muss man Eigentümlichkeiten, Gewohnheiten und Wünsche des Gastes respektieren.

UNSERE GÄSTE

Es ist nicht angebracht, einen Gast nach seinem Aussehen und seiner Kleidung zu klassifizieren. Oft kommt es vor, dass sich Gäste nicht den üblichen Bekleidungsrichtlinien unterziehen, was zu Fehleinschätzungen führen könnte.

Der Stammgast

Stammgäste sind immer mit dem Namen (und Titel) zu begrüßen. Man sollte

seine Gewohnheiten und Wünsche kennen, um ihn eine spürbare persönliche Betreuung/Bevorzugung erfahren zu lassen.

Die Geschäftsleute

Das diskrete Verhalten der Mitarbeiter im Service gegenüber diesen Gästen ist besonders wichtig. Weiters sollte man den Faktor Zeit, insbesondere beim Mittagessen, berücksichtigen (vgl. Business lunch, Seite 106). Bei Stammgästen (vor allem, wenn es sich um Geschäftsleute handelt) wird die Rechnung häufig nur unterschrieben und nachgesendet. Monatsrechnungen sind üblich.

Die ausländischen Gäste

Die Betreuung ausländischer Gäste erfordert mehr Zeit und Einfühlungsvermögen. Auf alle Fälle sind landesübliche und regionale Spezialitäten mit korrespondierenden Getränken zu empfehlen. Auch ihre eigenen Ess- und Trinkgewohnheiten sollten respektiert werden. Bei der Betreuung von ausländischen Gästen müssen Sie bedenken, dass Sie das Gastgeberland repräsentieren.

Die Passanten

Passanten sollten nie den Eindruck bekommen, dass man sich um sie weniger bemüht als um andere Gäste. Nur mit einem guten Service haben Sie die Chance, Passanten zu Stammgästen zu machen. Besondere Bedeutung kommt der Empfehlung von Spezialitäten des Hauses zu.

Die Kinder als zukünftige Stammgäste

Für viele Kinder ist es ein Erlebnis, in das Restaurant mitgehen zu dürfen. Wenn sie sich wohl fühlen, entscheiden sich die Eltern oftmals für einen weiteren Besuch. Kinder brauchen viel Beachtung und müssen beschäftigt werden (etwas zum Malen, Spielen bereithalten). Das Essen sollte möglichst schnell und vor dem Essen der Eltern serviert werden, somit haben sie Zeit, den Kindern behilflich zu sein. Kindersitze bzw. Polster müssen vorhanden sein. Wenn Sie im Restaurant spezielle Kindermenüs anbieten, sind die Eltern darauf hinzuweisen.

Die behinderten Gäste

Bei geistig und körperlich behinderten Gästen ist einfühlsame Hilfe angebracht. Ein großer Fehler wäre es jedoch, wenn man sie nicht genauso behandelt wie die anderen Gäste. Der Platzierung kommt besondere Bedeutung zu.

Die älteren Gäste

Das wichtigste ist, Rücksicht zu nehmen. Ältere Menschen benötigen oft mehr Zeit. Beim Platznehmen und Aufstehen sowie beim Ablegen der Garderobe sollte man behilflich sein. Manchmal wünschen sie eine spezielle Diät, häufig kleinere Portionen.

Der Einzelgast

Den Einzelgast (insbesondere Damen) bei der Platzierung nicht benachteiligen. Wenn es irgendwie möglich ist, setzen Sie ihn nicht zu mehreren anderen Gästen. Halten Sie Zeitungen und Zeitschriften bereit. Wichtig ist, dass Sie nicht gleich fragen: "Sind Sie allein?". Man weiß nie, unter welchen Umständen der Gast zu uns kommt.

Der Gourmet

Er versteht es, mit Speisen- und Weinkarten umzugehen, und hält viel von Tischkultur und Tischsitten. Beraten Sie ihn daher dementsprechend.

BEGRÜSSUNG DES GÄSTE

Die Begrüßung ist der erste Kontakt zwischen dem Gast und dem Servierpersonal. Schon dieses erste Zsammentreffen, die ersten Gesten können ein guter oder schlechter Anfang für das Verkaufsgespräch sein. Daher ist die Begrüßung besonders wichtig, und einige Punkte sollten beachtet werden.

- Gehen Sie dem eintretenden Gast entgegen.
- Grüßen Sie als erster.
- Grüßen Sie höflich und der Tageszeit entsprechend (guten Morgen, guten Abend usw.).
- Sehen Sie dem eintretenden Gast beim Gruß ins Gesicht.
- Alle Gäste haben dasselbe Anrecht auf eine höfliche Begrüßung.
- Machen Sie keine Unterschiede!
- Geben Sie dem Gast zu erkennen, dass er willkommen ist.
- Seien Sie dem Gast beim Ablegen der Garderobe behilflich.
- Reden Sie den Gast mit dem Titel und dem Namen an, wenn Sie ihn kennen. Achten Sie auf die richtige Aussprache des Namens. Der Titel steht immer vor dem Namen, z. B. guten Morgen, Frau Dr. Mayer; guten Abend, Herr Professor Steinweger.

PLAZIERUNG DES GASTES

Nach der Begrüßung fragt man den Gast, ob ein Tisch reserviert worden ist. Ist das nicht der Fall, bietet man ihm, wenn möglich, mehrere Tische zur Auswahl an. Das Platzieren erfordert viel Umsicht und Fingerspitzengefühl und sollte nur von erfahrenen Mitarbeitern (maitre d'hôtel, Oberkellner) durchgeführt werden. Er trifft die richtige Wahl des Tisches unter Berücksichtigung von Stammgastwünschen bzw. Sonderwünschen der Gäste. Natürlich kennt er auch die Belastbarkeit der einzelnen Stationen bzw. Servicemitarbeiter.

PRÄSENTIEREN DER SPEISEKARTE – APERITIF EMPFEHLUNG

Mit dem Präsentieren der (geöffneten!) Speisekarte beginnt bereits das Verkaufsgespräch. Bieten Sie verschiedene Aperitifs Ihres Hauses an, oder präsentieren Sie den Aperitifwagen. Nach dem Service des Aperitifs sollte dem Gast die Gelegenheit gegeben werden, sich auf die Atmosphäre des Restaurants einzustimmen.

EMPFEHLUNG – BERATUNG

Genaueste Produktkenntnisse sind eine Voraussetzung für einen erfolgreichen Verkauf. Beachten Sie vor allem:

- Konkrete Empfehlungen machen. Aktuelle Alternativen anbieten.
- Interesse wecken.
- Speisen appetitlich erklären.
- Auf den Gast und seine Wünsche eingehen.

SERVICE

Man beginnt mit dem Getränkeservice, erst dann werden die Speisen serviert, und zwar die einzelnen Gänge allen Gästen, die diesen Gang bestellt haben, gleichzeitig. Nach dem Essen wird abserviert, die Tische werden gereinigt (mit Tischbesen und Schaufel oder Serviette und Dessertteller). Erst jetzt werden die Dessertkarten gereicht. Die Dessertbestellung wird aufgenommen, boniiert, und der Kellner fragt, welches Getränk zum Dessert serviert werden darf (Wein-/Getränkete). Nun werden auch die Menagen entfernt, wenn zum Nachtsch kein Käse bestellt wurde. Dann deckt man für das Dessert. Nach dem Abservieren fragt der Kellner, ob Kaffee gewünscht wird und welcher Digestif serviert werden darf.

EINSTELLEN

Das Einstellen ist die häufigste Servierart. Die Speise kommt entweder auf dem Teller oder angerichtet auf Portionspaletten aus der Küche.

Die Teller werden dem Gast von rechts serviert (eingestellt).

Bei Portionsplatten wird dem Gast zuerst der warme oder kalte Teller von rechts serviert und dann oberhalb des Tellers die Platte mit dem Vorleger eingestellt. Bei warmen Speisen ist es vorteilhaft, wenn man die Platte auf einen Rechaud oder Platemeister stellt.

Beim Einstellen von rechts stellt der Kellner das rechte Bein mit der Fußspitze zur Tischmitte einen Schritt vor und drückt das Knie durch. Das Gewicht lastet auf dem rechten Bein, und die tragende linke Hand befindet sich hinter dem Rücken des Gastes.

Beim Servieren von Speisen der Nouvelle cuisine wird nur eingestellt, da sie bereits in der Küche vom Koch auf Tellern angerichtet werden.

Beim Service von offenen Getränken wird ebenfalls von rechts eingestellt. Aus Flaschen, Krügen oder Karaffen wird zuerst von rechts eingeschenkt und danach die Flasche, der Krug oder die Karaffe eingestellt.

Auch Kaffeehaustassen werden von rechts eingestellt.

TABLE-D'HÔTE-SERVICE (SERVICE FÜR REISEGRUPPEN)

Das Charakteristikum des Table-d'hôte-Service ist, dass einer größeren Anzahl von Personen zur gleichen Zeit die gleiche Speisenfolge eingestellt oder vorgelegt wird. Das Table-d'hôte-Service eignet sich vor allem zur Bedienung von Reisegesellschaften, aber

auch in Kurhotels, Sanatorien, Heimen und Gästehäusern wird es angewendet. Es ist die einfache Art des Bankettservice.

Vorteile Die Küche kann rationell, d. h. mit wenig Personalaufwand, arbeiten. Auch für das Service wird weniger Personal benötigt.

Nachteile: ergeben sich für den Gast. Bei dieser Art des Service ist der Tausch von Speisen nicht möglich. Versäumt der Gast einen Gang, so wird dieser nicht nachserviert.

Der Umfang dieser Arbeit wurde absichtlich etwas weitergespannt, damit es nicht nur in der Schule, sondern auch als Nahschlagwerk für das ganze Berufsleben Verwendung finden kann.

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MARKETING A GASZTRONÓMIÁBAN...

Pichler József

Absztrakt

A dolgozat a vendéglátó ipari értékesítés fontosságáról, valamint a munka végzéséhez szükséges emberi és szakmai felkészültségről szól, az értékesítési munka lassan feledésbe merülő szabályairól.

Az éttermi munka területén dolgozók szakmai tudásának szerves részét képezik a gasztronómiai alapismeretek. Ezért fontos hazánk jellegzetes étel- és italkínálatának ismerete, az éttermi választékban való pontos tájékozódás.

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Publikationen: www.igyk.pte.hu, www.mtmt.hu

MEASUREMENT PROBLEMS OF THE PERFORMANCE OF ECOTOURISM IN HUNGARY

ZOLTÁN RAFFAY

Abstract

Ecotourism is an activity whose popularity is increasing in Hungary. A significant proportion of the country's territory is protected and well over a million visitors were registered in 2010 in the national parks of Hungary. It is not always easy to measure the performance of ecotourism, however, and it is not always clear to what extent the favourable processes in the improvement of the state of the environment can be attributed to tourism. The essay looks at what problems we encounter when we want to see how an effective ecotourism activity we pursue in Hungary¹.

1. The definition and development of ecotourism

It is a commonplace now that tourism is the “industry of the 21st century”, a “phenomenon of our times”. After World War II the world actually really witnessed a growth in tourism practically unknown in any other sector (apart from a very few ones, e.g. ICT). The number of tourist arrivals grew from only 25 million in 1950 to 940 million in 2010 (had it not been for the economic crisis, this number would definitely have surpassed 1 billion) and is expected to rise to over a billion and a half by 2020.

1 Lector: Dr. Zsolt Huszti PhD

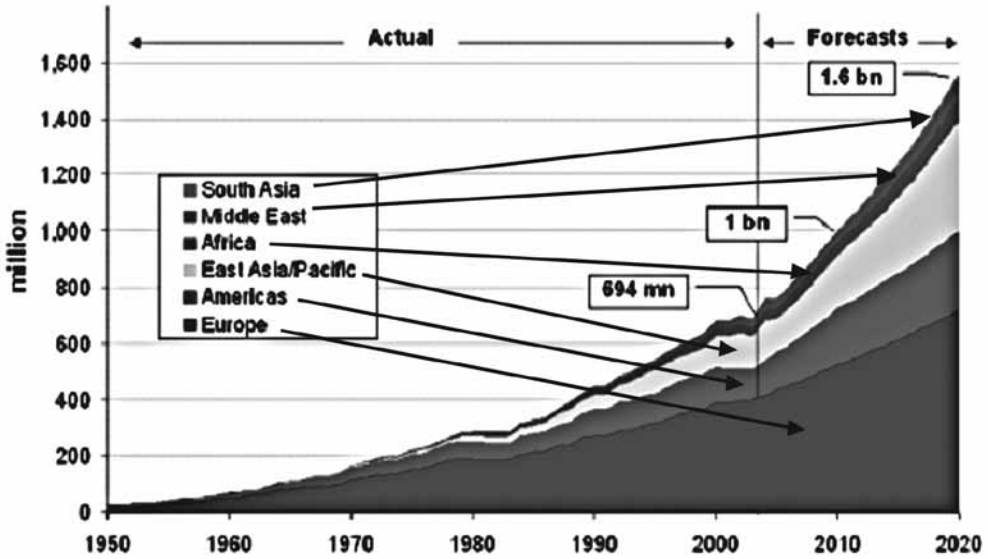


Figure 1. Number of tourist arrivals in the world, 1950-2020

Source: UNWTO, 2004

For decades, tourism was seen as a sector with almost unlimited growth potential, a sector offering a solution for the world's poorest nations to integrate into the world economy, and an economic activity suitable for the development of the local communities. By the 1970s and 1980s, however, the undesired impacts of the uncontrolled development of the tourism sector became obvious (Table 1).

Table 1

Economic, social and environmental impacts of tourism

	Economy	Society	Environment
Positive impacts	<p>Creation of new jobs Revenues from tourism Growing weight of services New types of employment in tourism Appreciation of vocational and language skills Tourism as an auxiliary economic activity is a diversification factor Improvement of the economies of backward regions Increased land values Development in infrastructure Growing shopping facilities Improved image of a place Rising living standards</p>	<p>Population growth Inflow of external seasonal labour force (<i>in vacant jobs</i>) Presence of holiday home owners (<i>if they join in local life</i>) Increased social and cultural activity Growing pride of the locals of their place Weakening prejudices, stereotypes, growing tolerance Increased social mobility Growing number of leisure activities Personal relations, meeting new people Learning languages and professions Better work ethic, more polite locals Renaissance of local arts, handicrafts and cultural events Renaissance of local construction styles</p>	<p>Protection of natural resources of outstanding aesthetic value Creation of national parks Attitude-shaping role of ecotourism</p>
Negative impacts	<p>Growth of seasonal jobs Creation of jobs for unskilled labour force Shortage of labour in traditional sectors Increase of prices, inflation Over-dependence on tourism Difficulties of acquisition of real estate or land</p>	<p>Inflow of external seasonal labour force (<i>if they occupy jobs of locals</i>) Presence of holiday home owners (<i>if they do not take their share from the tasks of the community</i>) Increased economic inequalities within the community Growing share of non-permanent residents Conflicts with holiday home owners Loss of cultural identity Weakening ethic norms, transforming value systems Increased sexual promiscuity Religious conflicts (with holiday home owners and tourists) Disintegration of social networks Hectic lifestyle of those active in tourism Growing sense of danger (<i>crime</i>) Commercialisation of hospitality and culture Spread of deviant behaviours Weakening local language Loss of local habits, traditions Crowdedness and traffic problems</p>	<p>Littering Air pollution (transport) Noise pollution Heat pollution Chemical/physical degrading of soil Degradation of stones Vandalism Fires lit Water pollution Illegal quay constructions and filling up of shore Destruction of wildlife, decline of habitats Change of landscape (by tourism facilities and inconsiderate constructions)</p>
Impacts neutral in themselves		<p>Change of age, gender, race and ethnic structure due to immigration Urbanisation of the population Transforming social classes Transition of family structure Change of consumption habits Change of housing conditions Transformation of behaviour (demonstration effect)</p>	

Source: by the author, based on Puczko-Rätz (2002)

Parallel to the growing awareness of the global problems (to name but a few: global warming, biodiversity and ecosystem losses, fisheries depletion, deforestation, water

deficits, maritime safety and pollution, growing gap between rich and poor nations, terrorism etc.), the necessity to develop the tourism sector in a direction that does not prevent the future generations from enjoying the tourism attraction that we can enjoy today became a more and more often raised issue. The World Tourism Organization and other organisations interested in tourism development first defined sustainable tourism and ecotourism and then started to pay more attention to this tourism activity, besides other tourism branches, of course. Sustainable tourism in the WTO's definition is seen as management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems- integrating the idea of sustainable development and tourism, actually, where sustainable development is seen as "meeting the needs of the present without compromising the ability of future generations to meet their own needs" (World Commission on Environment and Development, 1987). Ecotourism, also known as ecological tourism, is "responsible travel to fragile, pristine, and usually protected areas that strives to be low impact and (often) small scale. It helps educate the traveller; provides funds for conservation; directly benefits the economic development and political empowerment of local communities; and fosters respect for different cultures and for human rights" (wikipedia.org).

"In late 1970s and early 1980s the world organisations of nature and environment protection were created and they drew attention to the problematic impacts on the natural and social environment induced by the travels. Their campaigns resulted in the organisation of the first eco-minded tours and to the birth of ecotourism per se as a form of travel. The first definition of ecotourism was made by Hector Ceballos Lascuráin, and this way ecotourism was raised to the level of the other tourism sectors and was given more and more attention, due to the ever strengthening global and local movements of environment and nature protection. The appearance and development of ecotourism thus perfectly fits into the worldwide trends: the appreciation of nature, increased environmental consciousness, evaluation of health and healthy environment, self-expression, the strengthening of individualisation, the search for authentic values (or values looking) authentic, globalisation and the access to information." (TÁMOP.-4.1.2-08/1/A project)

2. Ecotourism in Hungary

2.1. The ecotourism potential of Hungary

Hungary is extremely rich in natural values, not least partly due to the belated economic development of the country that allowed the survival of many natural or quasi natural areas, plain lands, marshes, flood plains, pastures, grasslands and forests. These areas are home to a spectacular fauna and flora, including many indigenous and rare species. Hungary now has no less than 10 national parks, 36 areas of landscape protection and 152 nature protection areas of national importance (Figure 2).

These areas together make approximately 10 per cent of the country's territory, while Natura 2000 sites are 21 per cent of Hungary. It is definitely the natural values that put the caves of the Aggtelek and the Slovak Karst on the world heritage list, while in the case of Hortobágy, the Fertő region and the historical wine region of Tokaj it is the combination of natural and cultural heritage that justified the award of the world heritage title in the 'cultural landscape' category.

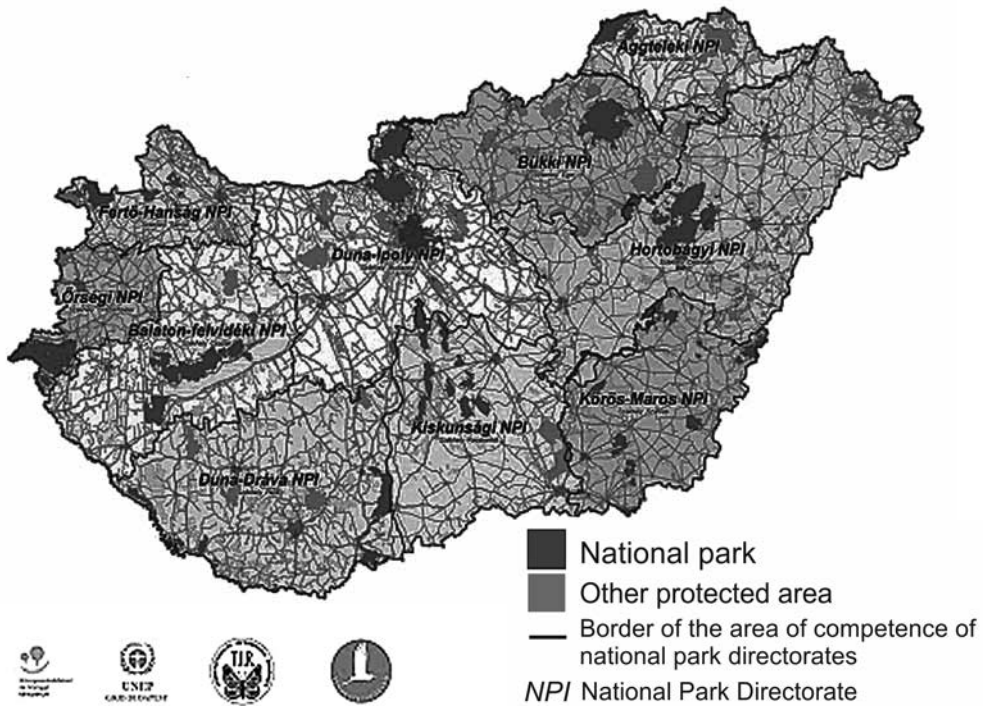


Figure 2.
Areas of nature protection in Hungary
(Source: www.termeszetvedelem.hu)

2.2. Developments and initiatives in ecotourism in Hungary so far

In Hungary the idea of eco-minded tourism appeared with the thought of the establishment of national parks. A geologist named Tamás Szontagh made a recommendation in 1879 “for the protection, preservation and maintenance of the natural values...²”, and it was also him who wrote in 1913 on the importance of national parks in tourism: “And the lucrative industry of serving guests and travellers does depend to a large extent on the beauties and rarities of nature, among other things.”

² He made this recommendation for a concrete natural value, the basalt columns of Somoskő in North Hungary

Mór Déchy, member of the Hungarian Academy of Sciences wrote in 1912 in his essay called “The protection of nature and the national parks”: “But the establishment of the National Park is not only desirable from the aspect of science. An economic significance can also be attributed to this institution. ... we definitely are able to create substantial tourism in an area derelict and neglected before. This means that we have to provide access to the park with good roads, so that all friends of nature has the chance to look into the special, ancient world for whose preservation the institution of the national park is dedicated.” (TÁMOP.-4.1.2-08/1/A)

The events of the 20th century, however, did not favour the creation of national parks, so the first park of Hungary, the Hortobágy National Park was created in 1973 (the first national parks of Europe were established in Sweden in 1909!), only, and the tenth national park was established in 2002, this was the Órség National Park.

Conscious ecotourism developments started in Hungary in 1998, when, on the initiative of the Office of Nature Protection of the Ministry of the Environment and Regional Development, a group dealing with ecotourism development was set up. The group functioned until 2004, when its role was taken over by the ecotourism departments operating within the directorates of the national parks.

The number of visitors to the national parks has grown steadily over the last few years. Figure 3. below shows the number of visitors registered by the directorates of the parks.

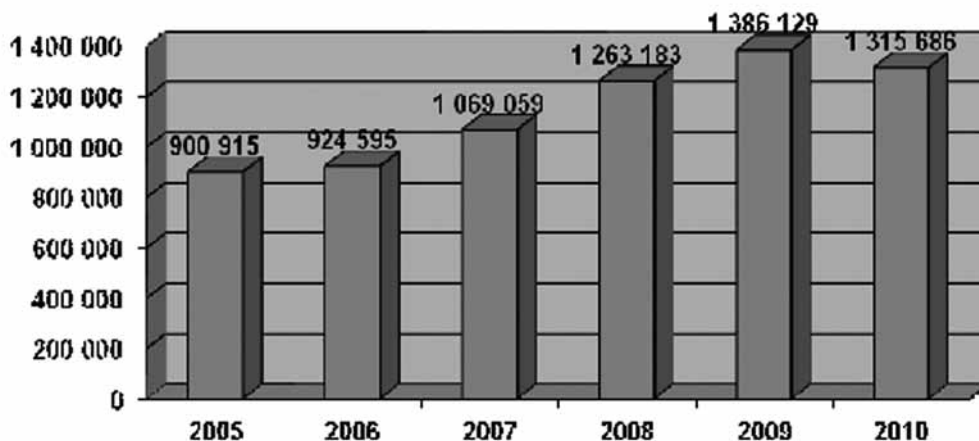


Figure 3.

Number of visitors registered at the directorates of the national parks in Hungary, 2005-2010
(Source: Rácz., A. at www.termeszetvedelem.hu)

The actual number of visitors is higher, as the data below only contain those visitors who bought entrance tickets and used paying services at the visitors centres, and also the guests staying at the accommodations operated by the directorates, and do not include those visitors who used the educational paths and non-paying facilities, who participated in free guided tours and other services free of charge. Also, hikers and excursionists at the protected areas are excluded.

3. Measurement problems of ecotourism in Hungary

3.1. Indicators used in tourism development in general

As tourism is becoming an increasingly important economic activity, the demand to monitor its environmental, socio-cultural and economic impacts grows, so that we should be able to develop the tourism sector consciously, decreasing the negative impacts and enhancing the positive ones. In this monitoring activity, indicators, i.e. quantifiable figures suitable for the assessment of the actual impacts of the tourism sector, are indispensable elements.

Table 1 reveals that it is primarily the socio-cultural and to a lesser extent also the economic impacts of tourism that have been given most attention from the academics and society so far, but we can also expect the growing importance of the environmental impacts of tourism, parallel to the spread of the idea (and also requirement and necessity) of sustainable development.

Some of the indicators of ecotourism are quantifiable, “hard” indicators (number of ecological accommodations established, number of jobs created in ecotourism- in eco-mined travel agencies or national park directorates-, increase in the number of guest nights in eco-lodges, change in the number of visitors to a ecotourism destinations, e.g. national park visitors centres, number of ecotourism projects implemented, e.g. guided tours or educational paths, etc.), but there are also non-quantifiable, “soft” indicators (strengthening of the environmental consciousness of the local inhabitants due to the ecotourism activities, growth of the pride of the local population about their place of residence induced by the intensification of the turnover at the destination, strengthening cooperation of the local inhabitants etc.).

Indicators, looking at their nature can be output indicators, performance indicators or impact indicators (plus baseline indicators that should come from officially recognized sources of information in order to let us know where we exactly are – this is the only way to relate to where we actually want to get).

- Impact indicators are linked to objectives and are expected to be achieved in the medium-long term; they show the consequences of the programme, project,

activity to the beneficiaries. They may be impacts that are specific to the given activity; others are longer term effects that concern the larger population (global effects);

- Output indicators complement impact indicators and are linked to results. They monitor the immediate products and services delivered to beneficiaries and can be used to justify short-term resource allocation decisions. They usually measure physical or financial units (length of roads built in kilometres, number of commercial accommodations created, number of firms receiving financial support from a programme, number of employees participating in trainings etc.);
- Performance indicators are linked to activities. To increase ownership of the process, key stakeholders (like ecotourism service providers and communities) should be involved in the setting of targets. They demonstrate the direct and immediate impacts generated by a programme. These indicators may be of physical character as well (growth of the number of visitors to a tourism destination, number of people successfully finishing a course, increase in the number of guest nights etc.) or of financial nature (investments induced in the private sector, reduced operational costs of hotels etc.).

Indicators should be set according to the SMART criteria: they should be Specific to the objective; Measurable either quantitatively or qualitatively; Available at an acceptable cost³; Relevant to the information needs of decision-makers; and Time-bound so that users know when to expect the objective or target to be achieved.

3.2. The use of ecotourism indicators in Hungary

There is a large number of (baseline, output, performance and impact) indicators for the measurement of the socio-cultural and the economic impacts of tourism, but the measurement of the ecological impacts is in infancy for the time being in Hungary. This is true despite the fact that ecotourism is an activity of growing popularity in several Hungarian tourism regions and it is more and more typical for the protected areas, including the national parks of Hungary, to build visitors centres and educational paths and organise ecotourism activities in order to receive a growing number of tourists and thereby improving their economic situation and decrease their dependence on the state supports.

The lack of ecotourism indicators is mentioned in the highest level tourism development document of Hungary, the Hungarian National Tourism Development Strategy. There are initiatives in the area of sustainable tourism but we lack a system of indicators that allows us to tell if a development, a service provider or a destination works in line with the principles of sustainability or not. Of the nine tourism regions of Hungary, the latest tourism development strategies do not contain any indicator for the measurement of the

³ Another possible word for 'A' is Achievable, i.e. realistic.

performance or impact of ecotourism in no less than five regions; the list of ecotourism indicators is very brief in the development document of the Budapest-Middle-Danube Area region, it is more detailed in the strategy of the North Great Plain, it is included in the development strategy of the Lake Balaton Region and is satisfactorily detailed in the region of the Tisza Lake, the only Hungarian tourism region whose main forte and development goal is the promotion of ecotourism (which can be seen in the number of study paths established in the last few years, where visitors can get to know the life of the mayfly or see bird rarities in their natural environment from the lookout towers).

Because ecotourism indicators are practically non-existent now in Hungary and ecotourism as a whole is not as developed and well-organised, as in many other countries of European Union, Hungarian stakeholders of ecotourism should look to the examples of other countries in Europe and the world. A possible country to study is Sweden e.g., as it was the first country in Europe to establish national parks (nine national parks on 24 May 1909); it has a long-established and well-functioning ecotourism society, Natures Best, whose achievements, including their labelling system, can be of use for Hungary when developing its ecotourism and setting its ecotourism indicators; and there are good examples for economically viable ecotourism projects in Sweden, see e.g. Det Naturliga Fisket.

The Society released a handbook a few years ago for ecotourism service providers, in which they specified basic criteria for the ecotourism sector as a whole (respect limitations of destination; support local economy; make all company's operations environmentally sustainable; contribute actively to conservation; promote joy of discovery, knowledge and respect; quality and safety all the way⁴) and special criteria for the following activities: hunting; fishing (more precisely: angling); horseback riding; dog sledge; kayaking; white water rafting and canoeing; ships; caves and mines; winter activities that include snow mobile transfers.

Since all of these activities, with the exception for two (dog sledge and winter activities that include snow mobile transfers) are relevant for Hungary as well, the special criteria set by the Society for the pursuing of these activities are a good basis for definition of specific ecotourism indicators. I added hiking, an ecotourism activity of growing popularity, to the list.

3.2.1. Indicators relevant for ecotourism activities

Below one finds a (far from complete) list of possible indicators that can be used to evaluate ecotourism as a whole. The first table is a collection of "universal" ecotourism indicators suitable for all ecotourism activities, whereas the second table is an attempt to define a few specific activity-related indicators. The list, especially of the specific indicators, is far from being complete; it is more of a thought-evoking attempt.

⁴ The compliance with these requirements, when measured with indicators used in the SMART way, can be taken as indicators themselves!

Output indicators	Performance indicators	Impact indicators
<ul style="list-style-type: none"> – number of new ecotourism facilities – number of renewed ecotourism facilities – number of ecotourism programme events – number of beds in eco-accommodations – number of ecotourism promotions, advertisements – number of professional and interest reconciliation forums, talks – length of newly built canalisation system – number of eco-tours realised – number of educational paths and visitors centres 	<ul style="list-style-type: none"> – Number of guests arriving at the destination for ecotourism purposes (guest nights, revenues of accommodations) – number of visitors to a place or event – declining seasonality, longer tourism season – increase in the average spending of tourists – dialogue, number of people participating in meetings – increased cooperation capacity and willingness – number of cooperations among ecotourism actors – number of applications submitted by ecotourism service providers – number of visitors to protected areas 	<ul style="list-style-type: none"> – growth of the share of ecotourism in employment – higher GDP/capita in the region in % of national average – preservation and sustainable development of heritage – improving income position of the inhabitants – improved image of a location/region/country – higher satisfaction of visitors – new settlements, organisations integrated in ecotourism – strengthening identity of the population – improved environment – consciousness of local inhabitants and service providers – growing share of protected areas – stabilisation and improvement of habitats

Table 2/a.
Indicators relevant for all ecotourism activities
(Source: by the author)

	Output indicators	Performance indicators	Impact indicators
Hunting	number of organised ecotourism hunts number of forums, talks among hunters and local stakeholders changes in the fauna and the game stock of the area	number of guests hunting length of season increase in average spending of tourists number of people participating in dialogues, meetings	preservation and sustainable development of game stock improved environment consciousness of locals stabilisation and improvement of stock of hunted species
Fishing	changes in the fish stock of the area increase of spawning areas	number of licences issued number of specimen fish caught	improvement of the stock of species caught
Horseback	number of organised tours changes in the flora and fauna of the area number of riding trails	number of guests increase in the average spending of tourists	growth in the stock of horses and improvement of the quality of the stock
Kayaking	number of organised tours changes in the flora and fauna of the area	number of guests increase in average spending of tourists	revenues from kayaking tourism
White water rafting, canoeing	number of organised tours changes in the flora and fauna of the area	number of guests increase in average spending of tourists	revenues from rafters
Ships	number of organised tours changes in the flora and fauna of the area	number of guests increase in average spending of tourists	revenues from cruisers
Caves and mines	number of organised tours changes in the flora, fauna, geology of the area	number of guests increase in average spending of tourists	revenues from visitors
Hiking	number of educational paths and visitors centres information signs set up	number of clicks to the information websites of paths	

Table 2/b.

*Indicators relevant for specific ecotourism activities
(Source: by the author)*

3.3. Problems of the measurement of ecotourism performance

If we want to be sure we are on the right track in the development of ecotourism, we need to know what impacts the ecotourism developments have on the environment and weather there are quantifiable achievements that should be maintained or possibly further enhanced. However, the measurement of the performance of ecotourism is hindered by several factors.

- First, the need to develop indicators in this activity is not really realised in Hungary,

which is partly due to the fact that this tourism activity is quite new in Hungary, and the methods to study and development this activity are not as much elaborated as in the case of tourism activities with longer traditions;

- We lack the system to collect data. There are facts and figures at the national directorates of people who purchase entrance tickets and use paying services at the visitors centres of the national parks, but we do not know much about people who use services free of charge and who ramble in the natural areas without being registered;
- Who will monitor these activities? National parks and other environmentalist organisations lack both human resources and financial means to carry out such activities;
- We cannot be sure if an improvement in the conditions of the environment is the result of ecotourism or other factors (e.g. the decline of polluting sectors).

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AZ ÖKOTURIZMUS HATÁSÁNAK ÉRTÉKELÉSI ÉS MÉRÉSI PROBLÉMÁI
MAGYARORSZÁGON

Raffay Zoltán

Absztrakt

Az ökoturizmus nemcsak általában a világban, hanem hazánkban is egyre népszerűbb turisztikai tevékenység. Az ország területének jelentős része nemzeti parki védettséget élvez vagy egyéb védett területnek számít, amely kiváló alapot teremt az ökoturisztikai szolgáltatások fejlesztéséhez, komplex ökoturisztikai desztinációk kialakításához. Az ökoturizmus azonban viszonylag későn indult fejlődésnek Magyarországon, és a mai napig komoly hiányosságokkal küzd. Ezek egyike az ökoturisztikai indikátorok hiánya, az ökoturisztikai tevékenységek gazdasági, társadalmi és környezeti hatásainak értékelési, mérési problémái. A tanulmány javaslatokat tesz az ökoturizmus eredményességét mérő indikátorok kidolgozására.

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Preface

The present studies highlight the diversity of professional interests and expertise of the staff working at the Institute of Literature and Linguistics. The common bond of the various topics published below is their interdisciplinary approach. It comes from the shared roots of arts and humanities and the courses our colleagues are responsible for, thus the papers presented here also reflect the contents of the different courses offered at the Institute. The authors' view and reasoning do not cover the whole aspect of the researched field; rather, they present a special segment of the problem, the context of which is viewed in a large, multi-focal academic environment. The added value of the papers that they can motivate both lecturers and students to further research, the result of which will hopefully bring a wider group of academics together.

István Béres PhD

editor

MARIA BAJNER:

THE CHOICE OF GEN Y: LIVE TO LEARN OR LEARN TO LIVE

DÓRA BORONKAI:

TEXT BASED COGNITIVE LINGUISTIC RESEARCH OF SPONTANEOUS AND PLANNED CONVERSATIONS

RESEARCH SUMMARY

BÉLA HORVÁTH:

INTERPRETATIONSMÖGLICHKEITEN EINES PSYCHOANALYTISCHEN KINDERGEDICHTES

MÁRTA KORPICS:

RELIGIOUS AND SACRAL COMMUNITIES IN PÉCS.

THE ROLE OF RELIGIOUS AND SACRAL COMMUNITIES IN SOCIALIZATION, AND IN THE CONSTRUCTION AND PROTECTION OF SOCIAL VALUES IN A RURAL HUNGARIAN CITY (PILOT STUDY)

THE CHOICE OF GEN Y: LIVE TO LEARN OR LEARN TO LIVE

MARIA BAJNER

Abstract

The aim of the study is to pinpoint the pitfalls of the education system, together with learning strategies, the value and prestige of degrees and foreign language competence concerning the „Millennials” or „Generation Y”, as young people born between 1980-2000 are often called. While in Hungary the language learning policy in theory follows or in some cases oustrips that of the European Union, in practice the implementation of the academic objectives, the process of obtaining the desired „EU compatible language competence” is merely a sounding phrase, the successful acquisition of which for the average student in the Hungarian educational system is something to be waited for. Language competence is a valuable asset, essential key-competence for the millennials wishing to enter the global labour market especially if they are not the lucky ones whose native language is one among the most spoken languages used worldwide. Educational institutions all over the country offer „easily convertible” skills including foreign language competence. The time used and money spent on learning vs. results is far from public and individual expectations; educational marketing slogans are not justified, neither are the unrealistic, far – fetched exam – centered assessment systems. It can be concluded from the above statements that for gen Y self-education, extra-curricular academic endeavour, and „beyond school” learning experience is an essential requirement lasting for a lifetime while training costs are to be paid by gen X-ers and boomers. Lifelong¹.

1. Defining the Millennials

Born in the mid-1980's and later, Generation Y, or the Millennials, legal professionals are in their 20s and are just entering the workforce. With numbers estimated as high as 70 million, Generation Y (also known as the Millennials) is the fastest growing segment of today's workforce. As law firms compete for available talent, employers cannot ignore the needs, desires and attitudes of this vast generation. The aim of this paper is to pinpoint the outcome of demographic changes concerning formal education of Generation Y, the pitfalls of the system focusing on marketing rather than real values, and the prestige

¹ Lector: Prof. Dr. Ferenc Zsélyi

of and demand for foreign language competence in the light of global labor market, while outlining some reforms established by politically involved high position decision makers. Clarify the meaning. Below are a few common traits that define Generation Y. What is Generation Y? Who belongs to this category? In short: they are the ambitious youth of the 21st century, who are expected to change the world. In a wider sense: the perspective influential segment of labor market, the “infoactive” “digital natives” born into the revolution of high-tech, who are at home in infocommunication and multimedia environment and even the expanded virtual world of cybersphere where the whole globe is just a click away.

Although there is no consensus on the clear categories concerning the age group of Gen Y (in other word “echo boomers” or “millennials”, there are several definitions (for the ones born 1977-2002, or 1979-1995, or 1982-2003, to mention just a few) the fact is that the Y-s are going to take significant part of the active working population. *Deloitte Consulting, Financial Advisory Company* classifies Gen Y as young people born 1982-1995, who are already in the front line at work. Analysts point out that Gen Y is such a “considerable factor” one cannot ignore: they are more in number than the boomers (born 1946-1964), and by 2025 they will take 60-75% of the world workforce. Consequently, the future of several companies (and countries) may stand or fall on them (Internet Ref. 1). In Hungary the picture is a bit more tinged as looking at the present trend: it can be foreseen that the most pressing issue after the retirement of the X-Gens, the Boomers and the Great Generation will not be the lack of graduates and senior managers but the lack of tradesmen and skilled workers.

It is a goal oriented, spoilt generation that favors diversity and telework, and who do not value title and position as much as their parents or grandparents did, says Paul Redmond, the expert of Liverpool University Career Center. Then again, they consider peer-friendship and fellowship as important as family bonds. For them lifelong learning is a lifestyle, a way of life, the essence of which is the degree of adaptability to the changing environment, and to what extent they can meet the challenges of the macro-and micro-climate. As more sociologists point out, the present students also have to reckon that by the time they graduate a few jobs, trades and professions existing today will disappear, curricula and learning material will become useless and obsolete.

2. Lifelong learning (LLL)

The importance of lifelong learning is upgraded, the expression itself has outgrown the category of hobby or recreation and is also different from spending more and more time behind school desk, neither does it mean collecting different certificates and degrees on paper. Behind LLL there is much rather a vision of a future career with the mastery of different skills and competences. In 21st century the acquisition of different skills requires untraditional resources. Exchanging ideas and transferring thoughts with mentors conducting practical training and tutors is more informal, group of students working on

task-and activity-based projects, while social network teams and peers collaborate rather than compete, while in this process constructive criticism represents added value. If the motivation for learning of Gen Y is compared with that of the previous generation, the following observations can be observed.

GENERATION	THE POINT OF LEARNING
Traditionalists (1909-1945)	Value, Prosperity, Status, „Live to learn”
Baby Boomers (1946-1964)	Culture, Turism, Intellectual Fulfilment
Generation X (1965-1980)	Business, Marketing, Money
Generation Y (1980-2000)	Information, Connection, Success

(Source:<http://cgi.ebay.com/Generation-Ageless-Ann-Clurman-J-Walker-Smith-Hardcover-2007-/341549251207>)

3. Marketing: values vs. money

As the millennials are the fastest growing segment of the labor market, headhunter firms make huge efforts to carry out the tasks coming from their clients of multinational companies to find prospective aspirants for future management posts. It also means that multitasking, flexible, talented graduates from good schools with command of several foreign languages are in an advantageous position opposed to their less able peers with socially disadvantageous background. In order to match the expectations of employees and employers, the future employer should be aware of the attitudes, fears, wishes or motivation of the „new girls and boys”. Among the expectations of the employers-among many others traits-the following qualities are listed: good communication skill, innovative and problem-solving skill, interpersonal and collaborative skills, high computer skills, critical and system-oriented thinking, creativity and intellectual curiosity, adaptability and the ability to resolve conflicts. Besides, foreign language competence is always a must (Internet Ref. 2). As the world is shrinking into a „global village” to speak at least one foreign language is a basic requirement, which is also supported by the EU language policy (according to which two languages are preferred), thus the representatives of the world of business and economy are interested in CV-s displaying multi-language competences. If the applicant’s resume shows that he/she is multi-lingual they will be chosen over other prospective employees that speak only one language. The business world is in need of people who are multi-lingual and multi-taskers because of the global economy. Command of a foreign language is essential for entering the global business world, which is seen in the field of HR, IT, or in Call Centers, but everywhere where the possibility of building international networking is given (Internet Ref. 3). Employees

are an asset to any business with more than one language at their disposal. Many employers will even pay them more for this asset.

Politicians, law makers and education-experts have enormous responsibility considering that it is not enough to be great in education marketing, but rather it has to be made clear that e.g. the three year degree BA or BSc is a foundation degree, the value of which is almost similar to the value of the former „matura” (GCSE), and also, that qualification does not mean automatic employment. The number of college/university applicants in 2009 has increased 12% as compared with data of previous year, while we are complaining about lack of skilled workers (Internet Ref. 4). Redmond points out in his research that 90% of the millennials go on to tertiary education, 70% of them – who believe that a degree is essential to achieve their goals-want a profession, and 40% of freshmen is hoping to have Master’s (Internet Ref. 5). The situation is presumably similar in Hungary, actually in tertiary education and the number of applicants we outstrip even the United Kingdom considering that—in the ratio of the population – 30% more Hungarian students go to universities and colleges than in the UK. At the same time according to statistics of entry data (www.felvi.hu) expansion experienced in the last 10-15 years is just about over; since 2005 the figures of applicants show continuous decline. Due to demographic fall and the process of shrinking government resources a considerable „struggle” for students has begun between institutions for the “customers” requiring “marketable” educational services. Marketing has achieved a never experienced significance in the rhetoric of higher education.

Higher education participants devote remarkably large energy to adapt to western style marketing style and with the promise of providing prospective students with up-to-date, marketable skills they wish to “sniff up” prospective employees. The multi-colored, multi-level, full-time, part-time, special cross-and retrainig courses offered by “The University of Generation Y” are soaring, and even the less popular institutions are advertising highly convertible classes for constantly widening target groups. University websites display photos of students with a wide smile and even more self-esteem, sending the same message to the world as reputable corporate companies: We are the best! There is no disappointment if you choose us! The biggest and highly advertised international career exhibition event “Educatio 2010” did not lack promising marketing slogans: “Practical training in focus” “Up-to-date marketable skills” “We offer a single training opportunity” “Everything is about you” “Competitive university” “We offer more than education” “High level English training for both domestic and foreign students” This latter term “language competence” – as mentioned before – has to be given priority at the training of the millennials. The question is, to what extent can and should tertiary education take the burden of this task upon itself essentially tailored to primary and secondary training levels. Languages for special purposes can be still an issue inside college walls. For ministry educators and high-level government officers with the EU accession and the EU policy on languages the task of solving the anomalies of foreign language teaching and learning has become an issue of concern.

4. Focusing on Language Acquisition

It goes without saying that students with no or little foreign language skills are in disadvantage in their future career over the ones who possess this trait. Bad news is that while 56% of the EU citizens speak at least one foreign language besides their mother tongue, according to the Eurobarometer 2006 survey, (Europeans and their languages: Summary 2006), 71% of the Hungarian population does not speak a foreign language (Internet Ref. 6). Good news is, that in language learning (especially in English) a positive trend seems to emerge, and it is particularly true for Generation Y and the adult population with a college degree. This complies with the EU survey, according to which English is spoken by 51% while German is 32% of the population in the European Union. It is obvious from the results that in Hungary the efforts of the educational policy makers are paid off, and the euro billions are well invested. The findings of the survey conducted on behalf of the government training centre (OFI) is positive about the 2003 World-Language project designed to enhance foreign language competence of high school students learning foreign languages intensively in class for a whole academic year (called: NYEK), similar to the EU-sponsored training programs covering all levels of formal education from elementary to adult level. The system of foreign language testing in and off school and the evaluation of language tests in secondary school has finished, and students are reimbursed the fees of successfully absolved language test from Tempus Funds. Language competitions, trainings, courses and conferences are organized, and owing to several EU projects, e.g. Erasmus, Leonardo, Grundtvig, Comenius, students can go abroad to improve their professional skills and immerse in the culture in the country of the target language. There is a big demand for this, because the language competence of students in trade schools falls far behind the achievement of students studying in a secondary school of different type (Internet Ref. 7). Sponsored from European Union Funds (TAMOP, HEFOP) a few of the subprojects on languages focus on improving the standard of language learning in vocational training with special emphasis on students with considerable social drawback (Nikolov 2009). The document of 163 items issued by the Ministry of Education goes further: Education for Everyone! Action Plan 2006-2010 prescribes that starting from 2010/2011 academic year every student in secondary school is entitled to have an access to studying English, so p.se they have the desire to do so (Internet Ref. 8). (The deadline has been modified to 2012-2013 due to the recession). The purpose behind the act is clear: provide the students with the chance of studying the language most of them would like to learn, and which is believed to give them tangible advantage in the long run.

5. Education policy: hasty decisions- lifelong consequences

It comes from the above that education and research are not internal affairs, especially, when the future of the next generation financed from billion-euro funds and by EU community grants depends on it. Participants of education field (students, parents) together with tax-payers demand a value for the input. They expect to have knowledge, skill, competence which can be traded for money and career, which – in real – is more than empty marketing, different from useless “exam-knowledge” the product of learning boring, outdated material without additional value. Several examples from the previous years can support the policy when decision-makers back-up projects of little, if any interest going against common sense and the real need of the majority of the population (including the interest of prospective young employees). The EU project HEFOP 3.5.1 with the message “Working out and implementing and up-to-date methods in adult education” and is supposed to support in-service language teachers and create modern, useful teaching resources. On the website of National Vocational and Adult Training Institute among the completed materials one can find language resources in Russian, exclusively. A brief reminder: in EU 7% of the population speak Russian, 85% of the Hungarian respondents find English the most useful language to study, 73% said it is German, and 2% voted for Russian (Internet Ref. 9).

The project manager in office has published the efforts and results they are making towards the improvement of teaching Russian, besides, the findings were presented at an international Lifelong-learning conference. The biggest achievement- as stressed by the person in charge- is that the Russian language teaching-awakening from an unfavorable position- should get promoted and by doing so it will regain its importance. As a result, different materials of refreshment courses are compiled so that it will be easier for the dedicated teachers of Russian to follow the “linguacultural changes” of the past 20 years. What comes to modern, vocational material one can find – among many others – “value-estimate”, “Russian teaching methodology”, “Russian policeman”, and “Design in Russian”. The objective of HEFOP 3.5.1 according to the Application echoes the well-known phrases of marketing jargon e.g. “relevant needs”, “marketable programs”, “satisfying individual needs”, “top jobs” (Internet Ref. 10).

Foreign language learning, especially for special purposes is also of economic interest, as funds are supposed to improve language and other employability skills of growing and grown-up generations living and studying in otherwise disadvantageous area so that they can overcome the hindrance of unequal chances in education. Speaking only one (or none) language will definitely shut them out. Lifelong. In compliance with comprehensive research on foreign language acquisition- quoting the expert Marianne Nikolov, “when it comes to foreign language teaching in vocational school it is typical for students to have no or a limited access to languages rather than Russian”. It is unlikely that with updated Russian students’ chances to integrate into the global European market will significantly enhance. The high-positioned decision making X-ers and Boomers are liable

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AZ Y GENERÁCIÓ VÁLASZTÁSA: LIVE TO LEARN OR LEARN TO LIVE

Bajner Mária

Absztrakt

A tanulmány célja, hogy rámutasson az 1980-2000 között született millenniumi, vagy más néven „Y generációt” érintő tanulási-oktatási csapdákra, a diplomák és az idegennyelvtudás érték- és presztízmérő szerepére. Míg Magyarországon a nyelvpolitikai alapelvek, célkitűzések és azok megvalósítása elméletben követik, sőt néhány tekintetben túl is szárnyalják az EU-s nyelvpolitikai normákat, addig az „EU-kompatibilis nyelvtudás” megszerzése a magyar közoktatási gyakorlatban még várat magára. A használható nyelvismeret munkaerőpiaci érték, kulcskompetencia a globális piacon elhelyezkedni vágyó ezredfordulós nemzedéknek, főleg akkor, ha anyanyelve nem a preferált világnyelvek egyike. A hazai oktatási intézmények „konvertálható tudást” ígérnek, amely alól az idegennyelv-oktatás sem kivétel. Az oktatásban eltöltött és a tanulásra fordított idő és pénz ennek ellenére nincs összhangban az egyéni és társadalmi elvárásokkal: a gyakorlatban nem működnek sem az oktatáspolitikai marketing szlogenek, sem a valóságtól elrugaszkodott, vizsgacentrikus értékelési rendszerek. Mindezekből következik, hogy az ambiciózus Y generáció számára az érvényesüléshez elengedhetetlen az iskolán kívüli (melletti) (ön)képzés, az egész életen át tartó tanulás. A tanulóépízt azonban az X-ek és a boomerek fizetik. Lifelong.

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Publications: www.igyk.pte.hu, www.mtmt.hu

TEXT BASED COGNITIVE LINGUISTIC RESEARCH OF SPONTANEOUS AND PLANNED CONVERSATIONS (RESEARCH SUMMARY)

DÓRA BORONKAI

Abstract

The research aims at presenting the textual features of dialogue on the basis of a spontaneous textual corpus collected by the author and two contemporary dramas in a functional and cognitive theoretical framework. According to this the analysis examines the contextual factors related to the outer domains of the dialogues, the structural features of the conversations, and the implementation of the basic relationships of the micro-level. The analysis also tries to find out what basic differences can be found between the two types of dialogues, and to what extent these variables contribute to the typological distinction of spontaneous and planned texts.¹

1. The purpose and topic of the study

This research aims at presenting the textual features of dialogue on the basis of a spontaneous textual corpus collected by the author² and two contemporary dramas³ in a functional and cognitive theoretical framework (Schwarz 1992; Langacker 1987, 1991; Lakoff 1987).

According to this the analysis examines the contextual factors related to the outer domains of the dialogues (situational context, the context of action, thematic context), the structural features of the dialogues (adjacency pairs, the construction of turns, topic switches), and the implementation of the basic relationships of the micro-level (deixis, coreference). The main idea of the analysis of the linguistic elements is to show their communicative function on the basis of the functional approach. Since the corpus under examination contains partly spontaneous texts, partly fictional, constructed dialogues (which is due to their fictional nature), the analysis also tries to find out what basic differences can be found between the two types of dialogues, and to what extent these variables contribute to the typological distinction of spontaneous and planned texts (Tolcsvai Nagy 2001).

1 Lector: Dr. József Pethő PhD

2 The full spontaneous corpus can be found: Boronkai 2009, 155–178.

3 Szakonyi Károly 1976. Adáshiba. In: *Irányítószám 2000*. Magvető Könyvkiadó. Budapest. 111–208.

Szakonyi Károly 1976. Ha itthon maradnál. In: *Irányítószám 2000*. Magvető Könyvkiadó. Budapest. 375–402

2. The subject and method of the research

The examination of the textual features of dialogues has been implemented through the analysis of two, in many aspects similar, but basically different text corpuses. In both samples we can find conversations involving two or more people, their use of the language, style and textual structure show the characteristic features of common everyday linguistic activities. The basic difference among them is that one of the corpuses consists of real, spontaneous conversations, the analysis of which has been carried out after recording them on tape, with the help of simplified transcription (Jefferson 1989; Heritage - Atkinson 1984; Psathas - Anderson 1990; Psathas 1995; Have, ten - Psathas 1995). The other material, however, consists of pre-constructed dialogues, although it attempts to preserve the nature of spoken language in every aspect, it consists of fictional dialogues. The main difference between the two corpuses as far as their conditions of origins are concerned is that they have different social and temporary dimensions and the roles of participants also differ (Verschuereen 1999, 116–20; Tátrai 2010). According to the prototype-theory (Rosh 1977; Taylor 1991) one of the corpuses can be regarded a prototypical spontaneous dialogue, which takes place in colloquial speech, in a direct interactional situation, where the participants' roles constantly change. It is spontaneous and its reception is instant. The other corpus, however, is seemingly a prototypical planned text, which appears in written language, in an indirect interactional situation, with a delayed reception. One of its important characteristics is the constant nature of participant roles, and the fact that it is planned. It should be interpreted that the conversations of participants take place in a direct interaction with the exchange of embedded participant roles (Tátrai 2010), due to the characteristic features of a fictional piece of work a drama is characterised by appearance in written language and the constant nature of real participant roles (author and recipient). The problem of dramatic text is increased by the basically dialogic nature of linguistic activity (Bahtyin 1953/1988), since this interactive feature appears both in the relationship between the author and the recipient and also on the level of different discourses.

According to this, the analytical parts of the research aim to show the textual characteristics of prototypical conversations on the one hand by examining the text-corpus that consists of spontaneous conversations. The analysis of dramatic dialogues contributes to this, since the corpus that consists of dramatic dialogues cannot be classified into either prototypical conversations or prototypical planned texts, but their similarity to prototypical conversations provides an opportunity for the more detailed textual analysis of those. On the other hand, due to their similarity to the characteristic features of planned texts, the analysis of dramatic dialogues it makes possible to show the basic differences between spontaneous and planned interactions.

The analysis of corpuses has been carried out basically with the help of three methods. To compose the hypotheses related to the characteristic features of dialogic texts, first it was necessary to revise the related research literature, with a special emphasis on

practical analyses (e. g. Andó 2006; Hámori 2006; Rada 2007; Kugler 2007; Csontos 2007). The methodological framework for displaying the sequential organization of conversation analysis has been provided by conversation analysis (Have, ten 2005; Hutchby-Wooffitt 2006), making it possible to extend the textual analysis of dialogues. In these parts, some statistical calculations were necessary (e.g. index of depth/complexity) to determine the rates of adjacency pairs and speech acts, to show the characteristic features of topic switches and to describe the structure of the dialogues. The findings referring to deixis and coreference (Tolcsvai Nagy 2001, 173–238) are the results of the analyses of numerous practical examples, but it was also important to take into account the frequency of the phenomena under investigation. As far as the methods applied in the research are concerned, generally it can be stated that each part has been prepared in three steps. In the analysis of each topic area the first step was to process the related research literature, this step was followed by the detailed analysis of the corpus in order to determine the frequency of the occurrence of the given phenomenon, and then with the help of characteristic examples taken from the text the comparison of findings was carried out together with formulating the theses related to the given topic.

3. The theses and findings of the research

3.1. The role of contextual factors in the formulation of the text

The contextual factors of the dialogue (Tolcsvai Nagy 2001) are the most important elements of the communicative medium of the text that has been constructed, thus they can be ranked to the outer domain of the text. The situational context (Levinson 1983, 22–23; Tolcsvai Nagy 2001, 69–70; Tátrai 2004) the context of the action (the actions that take place during the dialogue), the thematic context (the context of the texts), the preliminary knowledge that is necessary for creating and processing of the dialogue, the linguistic interaction between the parties communicating and the linguistic norm that determines the text as a product belong here (Tolcsvai Nagy 2001). The part of the research that examines the contextual factors aims at finding differences between everyday spontaneous conversations and planned dramatic dialogues on the basis of the factors mentioned above. Summarising the factors, the following differences can be identified in the outer domain of the texts on the basis of the corpuses that has been examined:

- The occurrence of complex space- and time structure (Tolcsvai Nagy 1999; Bull 1968; Reichenbach 1947; Vater 1991) characterises both spontaneous and planned dialogues. There is an important difference, however, namely that the participants of spontaneous dialogues are usually found in the same physical world, in the same space and time, while it does not necessarily apply to the real and embedded characters of dramas in each case. Moreover, the space- and time structure of

situational contexts in spontaneous conversations is much more varied than that of dramas, but it is not marked explicitly in the text of the conversations.

- As far as the social world (Verschueren 1999, 81–82; Tátrai 2003, 390–396) of spontaneous and planned texts is concerned, it is true for both that different kinds of the social deixis are used to mark the relationships between participants. However, in spontaneous texts, as opposed to the embedded characters of dramas, the picture about the sociological and cultural position of the other party comes into play in each case.
- It is true for both types of dialogues that their linguistic acts appear together with other, non-linguistic acts, but while in spontaneous conversations the context of the act (Luckmann 1992; Tolcsvai Nagy 2001, 71–73) can be deduced from the texts of participants, in a drama it can be deduced from the author's instructions.
- Frequent, non-associative topic-switches are characteristic of the thematic context (Tolcsvai Nagy 2003; Cs. Jónás 1999) of both spontaneous and planned dialogues. Apart from this, in spontaneous conversations recurring topics that are exploited through a series of replicas and later, as well as the most frequent, in the text of a drama situational topic switches occur most frequently. In spontaneous conversations the knowledge organised around a central concept (Yule 1996, 83–89; Tolcsvai Nagy 2001, 73–78) has the most important role, while in dramatic texts following the script (Shank - Abelson 1977) is given a more significant role.

3.2. The basic unit of a dialogue: the turn

This part of the research examines the turn (Sacks - Schlegloff - Jefferson 1974; Iványi 2001) as the basic unit of dialogic texts through the analysis of spontaneous and planned conversations. The analysis examines the structural features of the turns on the basis whether they are closed or open and it also takes into account the complexity of dialogues. It also takes into account the typical occurrences of adjacency pairs (Schlegloff - Sacks 1973; Hutchby-Wooffitt 2006) together with the characteristic features of the embedded sequences (Jefferson 1972; Iványi 2001) and speech acts (Austin 1962/1990; Franke 1990). On the basis of the findings of the analysis of spontaneous and planned dialogues, the following main differences can be identified:

- As far as the structure of the turns is concerned, in spontaneous texts one- and two-level dialogues (Cs. Jónás 1999, 38–45) occur most frequently, while in dramas two- and three-level dialogues are the most widespread. In spontaneous texts there were more open dialogues, while in dramatic texts the ratio of open and closed dialogue-types was equal.
- Examining the sequential organization of dialogue-types, in both cases the dominance of question/answer pair sequences was the most characteristic, but in

spontaneous conversations the rate of yes/no questions was higher, while in dramatic texts there were more wh-questions. In dramas the negative answers were more frequent. Their sequential organization was more varied than that of spontaneous conversations.

- Spontaneous conversations were characterised by a more frequent occurrence of interpolated sequences and sidesequences. The function of communicative interpolations (Cs. Jónás 2003, 34) was different in the two types of dialogues.
- The topic of the mezzo-level paragraphs in spontaneous conversations was implicit, while that of dramatic texts was present in an explicit form. The paragraphs in spontaneous conversations usually did not relate to the previous and the following turns, while in the text of the drama this relationship usually existed. Spontaneous conversations were generally characterised by the use of Reported/Indirect Speech, while in the text of the drama often narratives in Direct Speech (Tolcsvai Nagy 2001, 296; Tátrai 2005, 222) occurred.
- As far as direct speech acts are concerned, in spontaneous conversations the preparatory strategy was more frequent, while in dramatic texts the suggestory formula (Szili 2002) occurred more often.

3.3. The micro-level elements of dialogues and their macro-level implications

In the structure of dialogic texts this part of the research examined two basic micro-level features. One of these phenomena is the deixis (Langacker 1987, 126; 1991, 91) which plays an outstanding role in the formulation of personal relationships on mezzo- and macrolevel, moreover, it also has an important role in the establishment of the network of time- and spatial relationships (Tolcsvai Nagy 2001, 175–180). These relationships usually cannot be separated from the points of view applied by the speaker and/or recipient, and this way deixis shows a close correlation with the concept of perspective. The first part of the study aims at showing perspectives and time- and spatial relationships applied in spontaneous conversations and dramatic dialogues, and in the analyses it lays the emphasis on the analysis of the relationship between the phenomena mentioned above and deixis. The second part of the study deals with coreference (Halliday-Hasan 1976), another micro-level feature, and it examines conceptually elaborated and schematic modes of appearance together with perspective, text-topic and text-focus (Tolcsvai Nagy 2001, 121–123). The analyses also provide examples of the points where the two components show a close correlation, and how it can be used in text-typological research as a text-typological variable. From the analysis of the micro-level components, the following can be stated with regard to the difference between spontaneous texts and planned texts:

- The deixis in spontaneous conversations is most often exoforic by nature (Halliday-Hasan 1976; Tolcsvai Nagy 2001, 175-180), in dramatic dialogues,

however, we can find endoforic deixises (Levinson 1983, 54; 85-94), as well.

- The most significant difference between the relations of perspective in dramatic dialogues and spontaneous dialogues appeared in the question of the “subject of awareness” (Sanders-Spooren 1997; Tátrai 2005).
- The most important characteristic of dramatic dialogues is perspectivisation, while in spontaneous conversations different forms of subjectivisation (Sanders - Spooren 1997, 86-95) occurred fairly often.
- Normal conversations more often contained examples of Direct and free Reported Speech, while in dramatic texts Reported (Indirect) Speech more often occurred (Kocsány 1996; Tátrai 2005, 222; Csontos-Tátrai 2008, 88-89).
- In spontaneous conversations verbal inflections were used to indicate possible variations of viewpoints, while in dramatic texts personal pronouns served the same purpose.
- Coreference proved to be basically anaphoric (Tolcsvai Nagy 2001, 180 in both types of dialogues, in their attitude to viewpoint no significant difference could be seen between the two types of dialogues.
- The most significant difference between dramatic dialogues and spontaneous conversations can be seen in their characteristic means of highlighting text-focus and text-topic (Tolcsvai Nagy 2003).
- The relationship between deixis and coreference appeared to be closer in dramatic dialogues.

3.4. The characteristics of spontaneous and planned dialogues

Summarising the findings of the analyses that have been carried out so far, this part of the research tries to give a global description about the most important textual characteristics spontaneous and planned texts. When discussing the two types of dialogues, it is worth pointing out that these categories are gradual as far as their nature is concerned, which means that each characteristic feature should be interpreted as a relative concept. According to this a given characteristic can be valid for a given conversation to a different extent, therefore planned and spontaneous conversations can be placed at different points of an imaginary line. At one end of this line we can find prototypical spontaneous dialogues, while at the other end we will find prototypical planned dialogues, and the given dialogues are situated between the two endpoints according to their extent of planning. According to this viewpoint, the prototypical spontaneous text adjusts to schemes that structure conversations to a minimum extent, and applies as few elements of that scheme as possible (e.g. the greeting or the leading-up topic is missing), in prototypical planned dialogues, however, parties continuously adjust to the given scheme, and continuously apply the rules of conversations (e.g. they generally build up dialogues with a closed structure and they follow the script related to the

situation.). Spontaneous and planned texts are characterised by gradual position, not only from the point of view of planning, but other textual features also follow it. As a result of this, the summarising statements related to dialogues should be interpreted in the light of this.

As a result of the analysis, some relative concepts can be identified with the help of which a better description of spontaneous and planned texts can be given. On the basis of the corpus that has been examined the following relative concepts can be identified:

- the occurrence of schemes of conversation
- the complexity of spatial and time structures
- the relationship between linguistic and non-linguistic actions
- the nature and frequency of topic switches
- the extent of deviation from the norm
- the rate of adjacency pairs
- the structural characteristics of turns
- the function on interpolations
- the question of the “subject of awareness”
- the role of deixis and coreference

According to the extent and/or the way these characteristics are implemented, each given dialogue shows a gradual position between the two endpoints of the spontaneous and the planned.

4. Summary

According to the first hypothesis a significant difference was anticipated between spontaneous and dramatic dialogues as far as their planning is concerned. This hypothesis proved to be true since spontaneous dialogues sometimes followed one of the presumable schemes only in an implicit form, while they appeared in the text of the drama much more strongly.

The second hypothesis presumed that there would be several agreements between the contextual factors related to the exterior domain of spontaneous and planned texts due to the similarity of the situations and the relationships among participants. This presupposition mostly proved to be right, since the elements of the situational context showed significant differences in both texts, the intentions and motivations of the linguistic and non-linguistic acts of the participants, which were carried out simultaneously, were similar and all of them did their best to create and understand texts that were valid in the given situational context. The most significant differences appeared in the following areas: the degree of explication of the information related to the contextual factors, the Application of previous knowledge and the extent to which the norms are followed, which can be related to the roles of embedded participants of planned dialogues.

The third statement was referred to the interior structural characteristics of texts, and it presumed that from this point of view spontaneous and planned texts would show significant differences. This hypothesis has only been partly proved, since several similarities can be found between the structural characteristics of dialogues. Such similarities include the sequential organisation of dialogues, since in both types of texts the rate of question-answer adjacency pairs was the highest. In both types of dialogues we could see examples of two-level open dialogues, interpolations and the Application of mezzo-level text-parts, but the Application of side sequences was not common in either corpus. The examination of the structural characteristics of turns showed both similarities and differences: in spontaneous texts one-level dialogues and interpolated sequences were more common, while in dramas even three-level dialogues appeared quite often. The function of interpolations was different in the two types of dialogues, when communicating mezzo-level text-parts characters in spontaneous texts rather used reported/Indirect Speech, while in dramas characters more often applied Direct Speech. From indirect speech acts, in spontaneous conversations the most frequent one was the preparatory strategy, while in the language of dramas the suggestory form was the most frequent.

According to the fourth statement, deixis that belongs to the micro-level components of a text plays a crucial role in creating the perspective of spontaneous and planned dialogues and also in creating spatial and time-relationships, as well. The analyses in both text-corpus proved the relationship between deixis and perspective and also the relationship between deixis and spatial and time-relationships, and these analyses have proved the statement in the second part of the hypothesis, according to which certain linguistic tools of the deixis have different functions in spontaneous and planned texts, since in spontaneous conversations verbal inflections are used most often to indicate possible variations of the perspective, while in dramatic texts personal pronouns serve the same purpose. Apart from these, they have also pointed out the main differences between the deictic references in the two texts: the exo- and endophoric nature of the deixis, the question of the “subject of awareness”, the subjectivisation and perspectivisation and also to the Application of Direct Speech, free Reported Speech and Indirect Speech.

The fifth hypothesis stated that the coreference-relationships of spontaneous conversations would be characterised by the frequency of pronominal anaphors that is expressed by a schematic concept. This hypothesis proved to be true completely, this hypothesis has been complemented on one hand by the fact that the dominance of pronominal anaphors was characteristic of dramatic dialogues, as well, not only of spontaneous conversations, and on the other hand by the fact that the explicit deixis and coreference are in close contact with each other in dramatic texts.

According to the sixth hypothesis there are several peculiarities in the text of drama that are due to conscious planning and their purpose is to imitate characteristics of authentic speech in the dialogues of the characters in the drama. The examples taken from the text of the drama have proved even more that it has been expected that the author applies a wide range of linguistic tools in the conscious planning of dialogues in order to create a harmony among the situation, the text and the style. These linguistic tools are generally less

characteristic of fictional texts, while in everyday conversations they are essential. Such tools are the Application of topicalized structures, error corrections, interpolations, interpolated sequences and discourse markers and also the syntactically incomplete construction, which is generally a characteristic of spontaneous texts.

According to the seventh hypothesis, which is a kind of summarising hypothesis, during the analysis of spontaneous family conversations and planned dramatic dialogues several differences are anticipated that might help to differentiate between spontaneous and planned texts. The criteria that have been formulated as a result of the analyses can be used only as relative concepts when differentiating texts. Some of them (e.g. the relationship between verbal and non-verbal actions, the structural characteristics of turns, the function of interpolations, the “subject of awareness” or the nature of deictic references) seem to be applicable in practice as a text-typological variable, but in order to apply them text-typological research and further corpus-based analyses are necessary.

The results of this study also show that although more research seems to be necessary to get a complete textual description of dialogues, in the fields of definiteness, concord, and the theme of distribution of the text-topic and text-focus, the findings of the research can be applied well in text-typological and stylistic research that has a cognitive focus.

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SPONTÁN ÉS TERVEZETT TÁRSALGÁSOK
KOGNITÍV SZÖVEGTANI VIZSGÁLATA
Boronkai Dóra

Absztrakt

A kutatás egy saját gyűjtésből származó spontán társalgási szövegtanulmány és két kortárs dráma elemzése alapján funkcionális és kognitív elméleti keretben a dialógus szövegtani jellemzőinek bemutatására törekszik. Az elemzés ennek értelmében megvizsgálja a dialógusok külső kapcsolódási tartományához sorolható kontextuális tényezőket, a párbeszéd szerkezeti jellemzőit, és a mikroszint legalapvetőbb viszonyainak érvényesülését. Az elemzés arra is választ keres, hogy a két dialógustípus között milyen alapvető különbségek mutathatók ki, és hogy a fent említett változók mennyiben járulnak hozzá a spontán és a tervezett szövegek tipológiai elkülönítéséhez.

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INTERPRETATIONSMÖGLICHKEITEN EINES PSYCHOANALYTISCHEN KINDERGEDICHTES

BÉLA HORVÁTH

Zusammenfassung

In der Geschichte von Kinder- und Jugendliteraturen ist es sozusagen eine allgemeine Erscheinung, dass ursprünglich nicht für Kinder gedachte Werke zu Klassikern der Kinderliteratur geworden sind. Eine eigenartige kommunikative Situation ergibt sich in solchen Fällen wie bei den schon früher erwähnten literarischen Werken, die zum Kanon gehören und zugleich auch Teile der Kinderliteratur bilden.

*Ein gutes Beispiel für diesen Prozess ist das Gedicht *Mama* von Attila József, einem der bedeutendsten Dichter der ungarischen Lyrik. Dieses ergreifend schöne Werk setzt der Mutter ein Denkmal, ist also für die Interpretation gut geeignet, und mit seiner künstlerischen Struktur ist auch jene Deutung adäquat, nach der sich ein erwachsener Mann hier an die längst verstorbene Mutter erinnert, an ihre Gestalt und Handlung. Das Gedicht gehört trotzdem zu seinen Werken psychoanalytischer Herkunft und baut sich aus Bedeutungsschichten diesen Bezugs auf.¹*

In der Geschichte von Kinder- und Jugendliteraturen ist es sozusagen eine allgemeine Erscheinung, dass ursprünglich nicht für Kinder gedachte Werke zu Klassikern der Kinderliteratur geworden sind. Der Gedanke von Rousseau, „Ihr sollt das Kindesalter mögen“, lenkte die Aufmerksamkeit der Gesellschaft nicht nur auf das Kind, sondern auch auf seine kulturelle Umgebung.

Im Zeichen der philanthropischen Pädagogik erschienen der Reihe nach Werke, die die Rolle von Wissen, Ration, Ethik oder Arbeit auf eine didaktische Art und Weise vermittelten. Um die Wende des 19. Jahrhunderts haben aber die pädagogischen Bewegungen des Zeitalters nicht nur ihre eigene Kinder- und Jugendliteratur geschaffen, sondern sie haben auch das „für Kinder Geeignete“ unter den Schöpfungen der Weltliteratur entdeckt. So sind durch Überarbeiten und „Zähmung“ auch solche Werke zu einem untrennbaren Teil internationaler Kinderliteratur geworden wie die Abenteuersonnen von Robinson Crusoe, des Barons von Münchhausen oder von Don Quijote. Über die Möglichkeit einer Interpretation und die

1 Lektor : Prof. Dr. Hans-Heino Ewers

Stufen der Aneignung bzw. Aufnahme des Cervantes-Romans schrieb der Verfasser selbst folgendermaßen: „Von den Kindern wird er in die Hand genommen, den Jugendlichen gelesen, den Männern verstanden und den Alten hochgepriesen.“

„Zur internationalen Kinder- und Jugendliteratur sollten demnach nur Texte gezählt werden, die von Kindern und Jugendlichen- auch in erster Linie oder ausschließlich - in ihrer Freizeit, d.h. außerhalb des Schulunterrichts und auch nicht begleitend zu diesem, gelesen werden sollen- und zwar mehr oder weniger freiwillig,, (Ewers 2000, 18)- schreibt Hans-Heino Ewers, auch auf jene Anschauung hingewiesen, die die Leistungen der Kinder- und Jugendliteratur nicht für vollwertige Werke hält. Demnach sei nämlich die Kinder- und Jugendliteratur bloß eine angewandte Literatur. Zweifellos gibt es unter den Lesestücken der Kinder auch Bücher, die teils didaktisch sind, teils auf eine allzu angeordnete Handlungsstruktur und ein angeordnetes Motivensystem gebaut werden. Andererseits ist auch ein 'kinderliterarisches' Werk Teil der Kommunikation, wird nach der Struktur der Kommunikation aufgebaut und repräsentiert ebenso ein Segment der Wirklichkeit, nur sein Adressat ist ein Anderer. Die Kinder- und Jugendliteratur passt sich an das Weltbild des Empfängers auch in der Hinsicht, in was für einer sprachlichen Sphäre der Text geschrieben wird, welche vorläufigen Erfahrungen zur Deutung und Auflösung des sprachlichen Codes gebraucht werden und welche Schicht der Wirklichkeit durch das literarische Werk repräsentiert wird.

Eine eigenartige kommunikative Situation ergibt sich in solchen Fällen wie bei den schon früher erwähnten literarischen Werken, die zum Kanon gehören und zugleich auch Teile der Kinderliteratur bilden. Diese Texte werden oft in überarbeiteter Form zum Teil der Kinder- und Jugendliteratur und in dieser Form werden sie bekannt. Im Fall Defoe wurde nur der erste Teil des Romans in breitem Kreise populär, jene Variante, die von der Kinder- und Jugendliteratur aufgenommen worden ist. In solchen Fällen wird das Werk auf Grund der Weltanschauung und Intentionen des Neubearbeiters bekannt. Mit einer anderen Situation hat man wiederum zu tun, wenn der ursprüngliche Text ohne Überarbeitung und Umgestaltung auf eine solche Art und Weise zum organischen Teil der Kinder- und Jugendliteratur wird, indem er durch eine flüchtige Interpretation für die Repräsentation des kindlichen Weltbildes geeignet wird. Es ist ein solcher Fall der Kommunikation, wenn man von zwei Adressaten (Doppeladressiertheit) oder sogar von mehreren sprechen kann (Mehrfachadressiertheit). In dieser kommunikativen Situation wird ein Vermittler in das allgemeine Kommunikationsmodell eingesetzt, der das Kunstwerk seinen über die kindliche Welt gebildeten Vorstellungen entsprechend interpretiert und auch dem kindlichen Leser so vermittelt. Hans-Heino Ewers bezeichnet jenen Leser, der die Zeicheninhalte des Kunstwerkes in diesem Sinne vermittelt, mit dem Begriff 'impliziter Mitleser'. „Wir wollen dabei nicht soweit gehen, den erwachsenen Mitleser generell als Stellvertreter des kindlichen und jugendlichen Lesers auszuweisen; dies implizierte bereits eine bestimmte Auffassung, von geeigneter Kinder- und Jugendliteratur, neben der durchaus andere vorstellbar wären.“ (Ewers 2000, 120)

Ein gutes Beispiel für diesen Prozess ist das Gedicht *Mama* von Attila József, einem der bedeutendsten Dichter der ungarischen Lyrik. Dieses ergreifend schöne Werk setzt

der Mutter ein Denkmal, ist also für die Interpretation gut geeignet, und mit seiner künstlerischen Struktur ist auch jene Deutung adäquat, nach der sich ein erwachsener Mann hier an die längst verstorbene Mutter erinnert, an ihre Gestalt und Handlung. Das Gedicht gehört trotzdem zu seinen Werken psychoanalytischer Herkunft und baut sich aus Bedeutungsschichten diesen Bezugs auf.

Von den großen Philosophien der Modernität wirkten die Lehren von Sigmund Freud (und seinen Anhängern) auf die Künste vielleicht am meisten. Als Freud im Jahre 1899 seinen ersten Vortrag vor vier Zuhörern in Wien über die Traumdeutung hielt, begann damit nicht nur ein neues Zeitalter der Psychologie, sondern es hat auch eine neue Gesinnung über die Welt und den Menschen, die menschliche Persönlichkeit ihren Anfang genommen. Die Freudschen Begriffe sind für heute Teile des alltäglichen Redens geworden (wie 'das Unbewusste', 'Verdrängung', 'Ödipuskomplex', usw.) und sind in dem Symbolsystem und der Metasprache der Künste besonders effizient. Sowohl die Welt der Literatur wie auch die des Films und der Malerei wurden insbesondere von der Begrifflichkeit des Unbewussten und seinem assoziativen System ergriffen. Mit Hilfe der Traumdeutungen entdeckte Freud, dass das Unbewusste nicht den Regeln der sprachlichen Syntax folgt, sondern seiner eigenen Logik entsprechend funktioniert und eine an Bildern reiche, dicht assoziative Welt schafft. Es ist nicht zufällig, dass die literarische Modernität um die Wende des 20. Jahrhunderts eben in Freuds Theorie und analytischer Therapie ein bestimmendes Erlebnis fand: Schnitzler, Musil, Kafka, Trakl, Döblin und andere. Thomas Mann- dessen Roman *Tod in Venedig* einen untrennbaren Teil der psychoanalytischen Rezeption bildet- nannte Freud „den Wohltäter der Menschheit“.

Zur Frage der Beziehung zwischen Psychoanalyse und den Künsten sowie der Interpretation von literarischen Werken psychoanalytischer Herkunft steht heute schon eine riesige Fachliteratur zur Verfügung. In diesem Kontext werfen sich aber immer einige grundlegende Fragen auf.

1. Wie ist das Verhältnis zwischen Verfasser und Psychoanalyse? Es ist üblich, auch mehrere Schaffende der literarischen Modernität der Jahrhundertwende als neurotische Persönlichkeiten zu beschreiben, die kürzer oder länger an einer therapeutischen Behandlung beteiligt waren, so z. B. Arnold Zweig, Hermann Broch, Otto Gross und andere. Könnten auf diese Weise die psychoanalytischen Inhalte an die Persönlichkeit, das Unbewusste und die Lebensgeschichte des Verfassers angeknüpft werden? Es ist allbekannt, dass ziemlich starke Durchhänge zwischen bestimmten Werken von Kafka und den Freudschen Thesen bestehen. Als eine interessante Anregung meint Claudia Liebrand, dass Kafkas Roman „Der Prozess“ die Ironisation der Freudschen Symboldeutungspraxis und die Subversion der psychoanalytischen Weiblichkeitskonstruktion sei. Liebrand untermauert ihre Annahme mit filologischen Argumenten. Werke von Freud waren zwar nicht in der Bibliothek Kafkas vorhanden, er konnte sie doch aus vielen Quellen kennen. „Es macht Sinn- das als plausibel zu erweisen, werde ich versuchen Textstrategien des Romanfragments als ironische Umschrift von Freudschen Konzepten, von Freudschen Argumentationszusammenhängen zu lesen. Manchmal scheint es wahrscheinlich, dass Kafka diese [Totem und Tabu, Bruchstück einer Hysterie-Analyse] oder jene unselbständige Publikation zu Kenntnis genommen hat ” (Liebrand 1999, 136)

2. Eine ähnlich wichtige Frage ist die hermeneutische Vorbedingtheit der Interpretierbarkeit. Ob jene psychoanalytischen Inhalte, wissenschaftlichen oder therapeutischen Kenntnisse, über die der Verfasser eines Werkes verfügt und die infolge dessen im Werk erscheinen können, Vorbedingungen für das Leserverstehen bedeuten? (Eine äusserst interessante Frage ist der kontaktherstellende Semiotismus der Intertextualität.) Offenbar ist nämlich, dass die literarischen Texte bestimmte zeitspezifische oder allgemeine Kenntnisse, kulturelle Traditionen thematisieren. Selbstverständlich können die Thesen von Freud die antropologische Schicht der Texte in Bewegung setzen, diese Theorie ist ja universal und ahistorisch, indem sie die Gründe seelischer Probleme in der kindlichen Verdrängung, in dem ödipalischen Komplex, usw. aufweist. Michael Titzman schreibt anhand des Zusammenhanges mit den frühen Modernen über die psychologisch-antropologische Relevanz und kulturelle Vorbedingtheit der Texte: „Aussagen über einen Text, die nur mit Hilfe einer psychologischer/antropologischer Theorie über den Text gemacht werden können, können naturgemäss zur Textbedeutung nur dann gehören, wenn die Theorie Teil des zeitgenössischen kulturellen Wissens ist. Nur dann können solche Aussagen grundsätzlich auch von einem zeitgenössischen Leser gefordert werden.“ (Titzmann 1999, 187)

3. Ein ebenso wichtiges – gar nicht nur theoretisches – Problem ist das Verhältnis von literarischen Formen, künstlerischer Kontstruierung und analytischen Inhalten. Wieviel wird durch sie verborgen, d.h. –mit einem Ausdruck von Freud – „sublimiert“, bzw. welche sind jene Traum-, Angst- und Verdrängungs-Inhalte (usw.), die den Text des literarischen Werkes durchschlagen? Norman N. Holland, einen Textkorpus des Hamlet analysierend, schreibt: „Wir haben nicht einen Gehalt, sondern zwei: ein unbewusster Gehalt (eine Wunsch- oder Angstphantasie) wird umgeformt in intellektuellen Gehalt: eine gedankliche Vorstellung, von der das literarische Werk »handelt«. Im grossen und ganzen kämen wir so dazu, den Akt der Transformation mit Abwehrmanöver zu assoziieren, die aus formalen Strukturen herrühren: verbalen Strategien-, -strophischen Einteilungen, der Abfolge der Bilder, usw.“ (Holland 1975, 375) Dieses Dilemma in der Interpretation, die Komplexität der Strategie besteht auch im Fall solcher Kunstwerke, wie das jetzt vorzustellende Gedicht. In der Geschichte Ungarns nach 1945 wuchsen Generationen mit dem Gedicht Mama von Attila József auf- es als Memoriterstück zu lernen, als Gedicht für den Muttertag zu gebrauchen oder nur als eine schöne Bekenntnis wahrzunehmen. Diesen Verstiel kennen auch Jene, die kaum noch Andere erwähnen könnten, und den Namen des Dichters können sogar diejenigen sagen, die nichts anderes über Attila József wissen. Das Leben von Attila József (1905-1937), sein Schicksal, seine Tragödie ist ein typisches mittel-europäisches Dichterschicksal.

Das Kennenlernen der Freudschen Thesen durch Attila József kann zeitlich auf die zweite Hälfte der 20er Jahre gelegt werden. Von 1931 an kann er die Analyse mit der Tiefenpsychologie auch in der Praxis erfahren, er bittet ja den Analytiker Dr. Samu Rapaport um Behandlung seiner Magenkrankheit. Diese Analyse dauert bis Mitte 1933, als ihm der Analytiker mitteilt, er könne seinen Patienten nicht heilen. Zugleich bildet sich Attila József fortwährend auch in der Theorie des Freudismus weiter. Er liest die

Werke von Freud (*Totem und Tabu*, *Das Unbehagen in der Kultur*), und lernt die Schriften von Wilhelm Reich kennen, der zur kommunistischen Bewegung gehört und in der Freudschen Theorie eine allzu starke Spiritualisation sieht. Die Zeitschrift *Korunk* in Kolozsvár gibt andauernd Platz für Schriften, die die Psychoanalyse interpretieren, so stellt er seinen Lesern auch jene Debatte vor, die das Verhältnis zwischen Psychoanalyse und Marxismus erörtert. Reich, der den gesellschaftlichen Grund der Neurosen für das Wichtigste hält, erarbeitet die Grundthesen der unter dem Namen „Freudomarxismus“ bekannt gewordenen Richtung. Seine Werke (so auch die *Karakteranalyse*) waren auch für Attila József bekannt, und einige Thesen von ihm in seinen Studien auch adaptiert (vor allem in seiner Arbeit *Egyéniség és valóság/Individuum und Wirklichkeit*, 1932).

Attila József ist seit dem Sommer 1930 Mitglied der Kommunistischen Partei, nimmt aktiv auch am Bewegungsleben teil. In den Gedichten aus den Jahren ist wiederum die Inspiration zur Lyrisierung der Freudschen Lehren und Begriffe, der Anspruch für die Ausgestaltung einer neuen Formsprache leicht wahrnehmbar. Das ist auch noch in seinen im Zeichen der „Ästhetik“ des Dogmatismus entstandenen Werken spürbar (*Munkások/Arbeiter, Külvárosi éj/Vorstädtische Nacht.*) Der Dichter gehört ab Herbst 1933 nicht mehr zur Bewegung, und seine beginnende Entfernung von der Ästhetik des Marxismus resultiert die Verstärkung der psychoanalytischen Anschauung. In den späteren Gedichten (1934-1937) dienen die analytischen Inhalte und Begriffe zum Aufbringen und Ausschreiben von immer tieferen seelischen Traumata. Insbesondere werden die Beleidigungen aus der Kindheit zu Motiven, thematischen Wanderbildern und in erschütternd schönen Gedichten formal vollendet (*Mint a gyermek/Dem Kinde gleich; Gyermekké tettél/Du hast mich zu Kind gemacht; Kései sirató/Verspätetes Klagelied*).

Die Gedichte des Herbstes 1934 weisen eine Verwandlung auf, es gelten nicht mehr der gesellschaftliche Bewusstseinsinhalt und die ausfallenden Reflexionen auf die Wirklichkeit als bestimmend, sondern eher der Narzismus des unendlich persönlichen Seins. Es werden jetzt diejenigen Verse geboren, welche die Selbstanalyse der Briefe an seinen früheren Analytiker, Samu Rapaport in einem andersartigen Grundriss fortführen. Sie konzentrieren auf die Vergangenheit des Ich und verständlicher Weise auf dessen symbolische Inhalte, hauptsächlich auf die Träume der Kindheit. Diese ausgezeichnete Positionierung der Kinderzeit, der schon beinahe pathologische Zwang der Selbstanalyse erschafft eine eigenartige Verssprache, die als typische Ausdrucksform der späteren Attila József-Dichtung betrachtet wird. Das sich eröffnende Persönliche spricht in einem beinahe antipoetischen Ton über das seelische Leiden. Die sich vereinfachenden Versstrukturen, die Imitationen klassischer Formen dienen zum Rahmen, als formales und sprachliches Material. Zugleich wird aber die lyrische Diktion des öfteren auf ein Bildgerüst gebaut, das schon gar nicht als Befolgung der poetischen Traditionen zu bezeichnen ist. Die Psychoanalyse dient nicht nur als Ordnungsprinzip der sachlichen und Erscheinungswelt der Gedichte, sondern sie bestimmt auch die Ordnungsmodi. Diese sind oft mit jenen Allegorien identisch, die die psychoanalytische Metasprache ausmachen, und die zugleich als philosophischer oder therapeutischer terminus technicus dienen. Die darauf spielenden, Allusion beinhaltenden lyrischen Texte rufen einerseits die mythologisierenden Inhalte der Psychoanalyse wach, andererseits bauen sie sie aktualisierend auch ab. Die manchmal als hypertextueller Text funktionierenden Bilder und Motive rufen einerseits jene

mythologischen, kulturhistorischen Reminiszenzen hervor, auf die diese Allegorien primär gebaut worden sind, andererseits lassen sie diejenigen allegorisierenden Mechanismen, Regeln wieder erwecken, die mittels der Lehren und des Kultus der Psychoanalyse in dem kollektiven und dem persönlichen Bewusstsein verwurzelt sind. Die Gedichte des Jahres 1932 benutzten schon diese allegorisierende Technik (*Ordas/Wolf, A hetedik/Der Siebte, Fák/Bäume*), indem sie einen analytischen Inhalt, Begriff, ein Verhältnis in der lyrischen Rede mit nicht-analytischen Gegenständlichkeiten interpretierten. Die im Herbst 1934 entstandenen Werke diesen Charakters zeugen aber von dem Reifwerden einer anderen Anschauung.

Ein häufiges Thema der Sonetten aus 1935-1936 ist die Sünde, die sündlose Sünde, stark inspiriert von Franz Kafkas Roman *Der Prozess*. Die Sünde erstreckt sich in diesen Gedichten von der erinnerungsartigen Fiktion der biographischen Geschichte bis zur metaphysischen Erweiterung. Der Begriff erscheint in unterschiedlichen Kontexten und unterschiedlichen Selbstanalysen, aber auf alle Fälle in einem solchen assoziativen Kreis, der mit seiner Rätselhaftigkeit den Weg zur Interpretationskonstellation des Freudismus und- im Verhältnis zur transzendentalen Kraft- auch zu einer christlichen, theologischen Interpretation gleicherweise öffnen kann. Es dürfte nicht einmal die Reihe jener Texte vergessen werden, in denen die sich in der Einsamkeit exponierende Partnerlosigkeit und Ausgestoßenheit in der Ambivalenz zur metaphysischen Macht und zum Sein eine Deutung, Selbstdeutung gewinnt. Die Konsistenz Sünde-Sühne-Unschuld ist schon das bestimmende, bedeutungskonstituierende Motiv und Emblem der späten Dichtung. In den verschiedenen Texten lässt sich- eventuell mit ähnlicher Sprachlichkeit, aber mit unterschiedlicher Intensität- die Sünde-Vorstellung und der Begriff artikulieren.

Mama

Jetzt hab ich immer sie im Sinne.
Die Mama ging, hielt manchmal inne,
mit ihrem Korb hinauf die Treppen-
so seh ich sie die Wäsche schleppen.

Ich, damals noch ein dreister Bengel,
fing an zu schrein, zu trampeln, quengeln:
Du sollst dich nicht mit Wäsche plagen,
Mich sollst du auf den Boden tragen!

Sie schimpfte nicht, sie ließ mich greinen,
die Wäsche hängte sie auf Leinen,
da schwebten sie, die weißen Biester,
gebläht, mich schreckte ihr Geflüster.

Zu spät. Jetzt artig sein ist müßig.
Die Mama ist so groß, so riesig:
Ich seh ihr Haar am Himmel wehen,
ihr Waschblau färbt die Himmelseen.
(1934, übers. von Géza Engl, 1960, 119)

In den Werken von Attila József formulieren sich mehrere Mutter-Bilder. Es erscheinen biographische Erinnerungen, so die Gestalt der beinahe ins Mythologische gehobenen Waschfrau, deren Arbeit und Mühe von der folgenden Hyperbel wiedergegeben wird: „Sie hat / manches erzählt und wusch dabei die Stadt.“ (*An der Donau*, übersetzt von Stefan Hermlin) In den letzten Gedichten scheint ein kompliziertes Mutter-Bild auf. Dieses Porträt wird schon von der Psychoanalyse, dem Schuldbewusstsein des Mannes, der in der Mutter die Frau sieht und sucht, also dem verdrängten Ödipuskomplex durchfärbt. Sein an psychoanalytischen Bewusstseinsinhalten so reiches *Verspätetes Klagelied* deutet auf diese Weise jenes Trauma an, eigentlich die Spaltung der Persönlichkeit, dass hier Mann und kindliches Ich verfließen: „Aus weichem Herbsttag und aus lieben Frauen / versuch ich, dass dein Bild sich mir erneuer;“ (übersetzt von Günther Deicke). Das selbe traumatische Erlebnis kommt zum Ausdruck in jenen Gedichten, die der Dichter an seinen späteren Psychoanalytiker schrieb. Nach der „Logik“ der Übertragung verliebte er sich in die schöne, junge Frau, aber die Liebesbegierde und der Wunsch des Kindes nach Hilfe ertönen simultan in diesen Werken. Dieses neubelebte und symbolische kindliche Ich ist ein Repräsentant des dichterischen Ich unter seinen letzten Gedichten.

Eines der schönsten Beispiele dieser poetischen und psychologischen Methamorphose ist das Gedicht *Thomas Mann zum Gruss*. Als der zur Emigration gezwungene Thomas Mann 1937 nach Ungarn eingeladen wurde, schrieb Attila József ein Gedicht an ihn als Ehrenbezeugung. Dieses an politischen Andeutungen reiche Gedicht („An der Menschheit Saat / frisst tödlich schrecklicher der Dschungelstaat“) wendet sich mit den Worten eines Kindes an den großen deutschen Schriftsteller:

Dem Kinde gleich, das sich nach Ruhe sehnt
und sich schon müde in den Kissen dehnt
und bittelt: Ach, erzähl mir was, bleib da
(dann ist das böse Dunkel nicht so nah)

(übers. von Stefan Hermlin, 1960, 151)

Die selbe Kindergestalt entfaltet sich im Gedicht *Mama*, in jenem eigenartigen Diskurs, der von dem Ich des erwachsenen Mannes und dem kindlichen Alterego geführt wird. Über das Entstehen und die Notwendigkeit des Schreibens dieses Gedichtes finden wir im Text selbst Hinweise:

„Jetzt hab ich immer sie im Sinne.“ Das Wort „immer“ zeigt den inneren Zwang und Monomanie zur Beschwörung der Gestalt der Mama. Und die Beschwörung der Vergangenheit, auch jene analytisch-therapeutische Erfahrung, die durch die Analyse der Vergangenheit die Gründe für die Probleme der Gegenwart finden will. Der Patient versucht mit Hilfe des Therapeuten von den schrecklichen Träume und Handlungen seines Lebens zu erzählen, die er lieber vergessen möchte, d.h. er legt die Tiefen seiner Vergangenheit bloß. Diese therapeutische Praxis, dieses Erlebnis – als Fallanalyse – schafft den lyrischen Text in diesem Gedicht. Es erscheinen die Geschichte und die Beziehung der Mama und des Kleinkindes. Die Mutter, die nur arbeitet und sich nicht um das Kind

kümmert, und das Kleinkind, das darunter leidet, von der Mutter nicht aufgenommen zu werden oder nicht mit ihr spielen zu können: „mich sollst du auf den Boden tragen!“ Es zeugt von einem eigenartigen Verhältnis, wie das Kind sein einstiges Ich wachruft („dreister Bengel“), das sich wirklich auf eine hysterische kindische Art und Weise benimmt, weint und stampft. Die Antwort, Worte der Mutter erscheinen aber nicht, im Gegenteil, sie schweigt, reagiert auf das Kind nicht, beschäftigt sich mit ihm nicht. Also wird die Erinnerung an eine gnadenlose Mutter heraufbeschwört. Offensichtlich ist das ein konstruiertes Mutterbild, nach „Regeln“ der Psychoanalyse, in dem Sinne die Entziehung der Nahrung und der Mutterliebe jene Träumen verursacht, die die Stabilität des Ich auflösen. So ist also das Bild der so aufgelebten Mutter eine Erklärung für die Probleme des erwachsenen Ich.

Die Struktur, auch die Zeitstruktur des Verses ist analytisch, sogar therapeutisch. Die Vergangenheit wird von der Gegenwart her aufgerufen, aus der psychologischen Situation, dass der erwachsene Mann fortwährend an seine Mutter denkt. Er taucht also in die Vergangenheit unter, und findet auch eine typische Geschichte, dass die Waschfrau-Mutter keine Zeit dafür hat, sich mit ihrem Kind zu beschäftigen. Also gibt es einen latenten Grund und eine Erklärung fürs Problem des erwachsenen Mannes. Dies wird aber nicht verfasst, der Text verbirgt es, verschweigt es. Der Ausdruck dieses Verschweigens ist die plötzliche Umschaltung, die Sprechsituation in der Gegenwart: „Zu spät“. Die Analyse hört auf, und es erscheint das vergrößerte mythologische Mutterbild. Die Mutter des Kleinkindes war wahrhaftig, ihre Gestalt ist aus biographischen Elementen aufgebaut worden, die des Erwachsenen ist aber mythisch, unbegreiflich, unerreichbar. Auf die Dichotomie von zweierlei Anschauungen weist dieses Bild hin: „Die Mama ist so gross, so riesig“. Auch aus dem Aspekt des Kleinkindes ist die energisch arbeitende Mutter groß und mächtig wie auch für den Erwachsenen, der das Erinnerungsbild seiner Mutter vergrößerte.

Wie die Zeitstruktur des Verses auf die therapeutische Methode der Analyse gebaut ist, so können wir hier auch die Assoziationstechnik erfahren. Die Versstruktur ist zwar nicht verwickelt, zeigt doch besagte plötzliche Umschaltung zwischen den Zeitebenen das Überkippen des Ich. Andererseits gibt der „dreiste Bengel“ seinen Emotionen nach, der Erwachsene ist aber bewusst. Also erscheint die Erkennung „Jetzt artig sein ist müssig“ in die epistemologische Konstruktion von Empfindung-Verstand gesetzt. Diesem, die Realität anerkennenden Satz folgen aber andere, nicht reale Bedeutungsinhalte. Die Vergrößerung der Mama-Gestalt („so gross, so riesig“) bereitet die Mythologisierung der Gestalt vor, wie ihre Haare im Himmel erscheinen und ihre Gestalt sich löst. Dem Leser fällt die Himmelfahrt der Jungfrau Maria ein, und wahrscheinlich wirkte dieselbe Assoziation auch im Dichter, er ließ ja sein Gedicht einmal mit dem Titel ‘Himmelfahrt’ veröffentlichen. Auch die Assoziationstechnik ist wahrzunehmen, wie sich das Schweben früher auf die Kleider bezieht (die Wäsche schweben), und dieses Bild ruft die Sakralisation, das Durchgleiten der Muttergestalt in eine andere Sphäre hervor. Von der sakralen Geschichte der Mutter von Christi, deren Kind nicht in Sünde gezeugt wurde, wird auch die konkrete Geschichte durchfährt. Diese Assoziation, die sowohl die

Geschichte von Mutter und Kind, wie auch die Gestalt der Mutter von der Realität entfernt, veranschaulicht auch die Dichotomie Mann und Kind. Es werden die Ich-Rollen, die Identitäten vertauscht: Der Mann vergrößert die Mutter und nimmt ihr die Geschlechtlichkeit, die sexuelle Wirklichkeit auf eine Weise, wie es das Kind tut, seinem intellektuellen-emotionalen Status entsprechend.

Ergreifend schön ist das Gedicht *Mama*. Auch eine oberflächliche Lesung kann die grundlegende menschliche Empfindung, die Liebe für die Mutter wahrnehmen. Die Tropen, die topologische Struktur des Textes lassen auch der kindlichen Interpretation Platz, einer solchen, die sich nicht auf die Abwertung der Poetik des Textes baut, sondern auf die Aufdeckung der den Erfahrungen, der Phantasie, der Assoziationsfähigkeit des Kindes entsprechenden Poesie. Die Botschaft, die Millionen ungarischer Kinder auch ein ästhetisches Erlebnis gab, gehört ja eng zur Rezeption des Gedichtes, zu seinem Deutungshorizont. Ohne Zweifel ist die Bekenntnis grundsätzlich nicht für die Kinderleser geschrieben worden, es hat also eine sekundäre Rezeption begonnen, wie der Prozess von Ewers beschrieben wird: „Hier findet eine Einwirkung auf den Sendeprozess statt, welcher eine Richtungsänderung, eine Umlenkung erfährt. So sehr sie auch auf der Rezeption des Textes oder Textkorpus beruht, so stellt die Rezeptionslenkung selbst doch einen Sendeakt dar- einen nach geordneten freilich, der als Eingriff in eine bereits begonnene literarische Kommunikation, aber auch als deren Verlängerung, als deren modifizierende Weiterführung begriffen werden kann.“ (Ewers 2000, 95)

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EGY PSZICHOANALITIKAI GYERMEKVERS ÉRTELMEZÉSI LEHETŐSÉGEI

Horváth Béla

Asztrakt

A gyermek- és ifjúsági irodalom történetében általános jelenség, hogy a nem gyermekeknek szánt művek a gyermekirodalom részévé válnak. Sajátos helyzet keletkezik, hogy a kanonizált irodalmi művek a gyermekirodalom szerves részét képezik.

Jó példa erre József Attilának, a modern magyar líra egyik legjelentősebb alkotójának műve, a Mama. Ez a csodálatos vers emléket állít az anyának, ahogy a felnőtt ember rá, meghalt anyjára emlékezik. A mű művészi struktúrája is ezt az emlékezési folyamatot tükrözi. A vers József Attila pszichoanalitikus fogantatású művei közé tartozik analitikus értelmezési lehetőséget nyújtva.

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Die Forschungsbereiche des Autors sind die Literaturwissenschaft und die moderne ungarische Literatur, mit dem Schwerpunkt Literaturgeschichte der 20. Jahrhundert und die Dichtkunst von Attila József. Der Autor hat mehr als 200 Publikationen (in vier Sprachen), dazwischen Monographien und Aufsätze. Er ist aktiv Tätig in verschiedenen wissenschaftlichen Organisationen und seit zwanzig Jahren als Dekan (v. Hauptdirektor) und Vize-Rektor in Hochschulbildung.

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RELIGIOUS AND SACRAL COMMUNITIES IN PÉCS
THE ROLE OF RELIGIOUS AND SACRAL COMMUNITIES IN
SOCIALIZATION, AND IN THE CONSTRUCTION AND PROTECTION
OF SOCIAL VALUES IN A RURAL HUNGARIAN CITY
(PILOT STUDY)

MÁRTA KORPICS

Abstract

The international and domestic context of the current research is twofold: one direction reflects on the changing relationship between religion and society; and the other perspective focuses on the relationship between communities and society. In the past few years the frameworks for studying various relationships between religion and communication, and church and social communication were developed in national communication research. The current research focuses on two scenes of the churches as participants in social communication: the internal scene and the scene of sacral communication. What responses do these communities offer to contemporary problems of late-modern societies, such as lack of trust, situation of families, community life, child rearing, and participation in civil society? ¹

The international and domestic context of the current research is twofold: one direction reflects on the changing relationship between religion and society; and the other perspective focuses on the relationship between communities and society. Religiousness in late modern societies has undergone major qualitative changes and this is a worldwide phenomenon. (Derrida-Vattimo 1996; Molnár 1994; Tomka 1996; Zulehner 2004). A new type of religiousness is being born- while church religiousness is losing grounds. (Berger 1980; 2004; 2005; Huber 2002; Newbiggin 2006; Tomka 1996; 2002). However, the presence of religion and churches in the scenes of social communication in late modern societies is not debated. Although studies examining the relationship between modernity and religion² long predicted that religion would

1 Lector: Dr. habil János Wildmann PhD

2 Kaufmann's work „Religion and Modernity” focuses on this relationship. Kaufmann relates the arising interest in religion with the ambivalent experiences in modernity. (Kaufmann, op.cit.)

lose its legitimizing role in the societies in modernity (Durkheim 2002; Weber 1992), when analyzing the role and presence of religion in late modernity, we can conclude that the sepredictions have not been confirmed (Casanova 1995; Mezei 2005; Martin 1978; Nagy J. 1997; Tomka 1996; 2002). The social role of religion definitely changed in the past 2-300 years; and the pace of the changes have accelerated in recent decades. (Bögre 2004; Kaufmann 1996; Martin 1978; Tomka 2001). The new social situation presents new opportunities for religions.³ The role of religion in late modern societies, the interpretations of individual and community religious phenomena, and studies on the related religious cognitions are more and more emphasized in the approaches of social sciences that aim to describe religions. It is not merely the significance of religions that is a major issue; rather, the presence of religion in postmodern Western societies and the role of religion in the post-totalitarian Eastern European societies. In both cases, religion is part of social competition (or market situation). As a consequence, its structures and types are changing and are becoming more and more differentiated. Besides spectacular decline, unexpected renaissance and prosperity is witnessed.⁴ The relationship between religion and society is being transformed; and the transformed relationship is worth studying.⁵

The transition of the social system in Hungary represented the most important transformations and challenges for the religions and churches. No matter if we examine the 1990's⁶ or contemporary relations, it can be concluded that the church has difficulties in determining its position in an altered political and social context. The reason for this is twofold: partly, it can be attributed to the change of social relations, but partly to inadequate reactions by the church. In the new structures of political freedom, or more exactly in the structures that are just being formed, the civil society is developing very slowly; and the number of autonomous citizens who are capable of and willing to take responsibility for the community is growing even slower.⁷ The other factor is the altered social status and internal life of the church.⁸ The contradiction between the two expectations can be traced back in the social arena for churches. The social arena determines the positions for the churches by defining where the society expects the churches to help and serve; and by determining the areas where the church offers its work for the society. (Tamás-Horányi 1997, 13). One of the areas, where the presence of the churches in the society is important is strengthening the

3 The role of Christianity in modern societies is not only represented in sociological debates and in social sciences but in theology as well (c.f. Geffre 2004, 409).

4 Robert Bellah assumes that religion has not been marginalized but has been moving more and more towards the centre (Bellah 1970).

5 This claim is confirmed by the recent interest of renowned social scientists who previously excluded religiousness from their interpretations on social reality (Habermas 2002), and now emphasize the importance of religiousness (see Derrida-Vattimo 1998)

6 Concerning the theme please see Lukács 1997; Tomka 1996; Hamp-Szöllősy 2000; Tomka 1996.

7 All the bases determining social structures (norms, social collaboration, conflict management, power distribution) were affected by the political and social transformation (Dahrendorf 1994).

8 The narratives describing the presence of the church in social scenes have changed and the church is often represented in an unfavorable manner.

civil society and undertaking various social tasks.⁹

Traditionally, it is the sociology of religion¹⁰ that provides a framework for analyzing the role of religion and churches in the society. However, altered social conditions demand the researcher to develop a different attitude and new frameworks for the research. In the past few years the frameworks for studying various relationships between religion and communication, and church and social communication have been developed in national communication research. This may be interpreted as an attempt at thematization (c.f. Korpics-P. Szilczl 2007, 11), as a result of the publications and completed studies in the field¹¹ it may be concluded that the theme is present in the domestic communication research; and other disciplines also pay attention to the results (c.f. Bognár 2008; Farkas 2009; Lovász 2008; Máté-Tóth 2010; Szabó 2010). The social representation of the church is formed on the basis of three different communicative manifestations: internal, external and upper directions. The internal direction equals to institutional communication, the external direction is present in the communication with the society, and the upper direction is related to the transcendent quality (c.f. Aczél 2010, 286). The three directions correspond to the three spheres¹² where church communication is manifested in social communication (c.f. Horányi- Szilczl 2001 83; Korpics 2011). Beyond communicative manifestations, the church is traditionally studied according to three different approaches: the church as a social institution, the church as a community and a group of religious people, and the church as a specific ideological system (Lukács 1997, 107). The first approach emphasizes the complexity of church communication; whereas the latest perspective focuses on the specific and complex features of the church. If we examine the three scenes from the point of participation in publicity, it can be concluded that communicative acts taking place in the second and third scenes are hardly represented and do not have a significant impact on processes of external (societal) publicity, although church communication in the external publicity is largely determined by the communication in the internal and

9 Religious organizations and associations are classified as civil organizations. (An-Na'im 2004; Anheimer-Themudo 2004, 274).

10 The entirety of Miklos Tomka's works, some of Peter Török's writings and articles by Endre J. Nagy, Özséb Horányi, Pál Tamás, Károly Varga, János Wildmann. The relationship between religion and health is analyzed by Bettina Pikó and Mária Kopp.

11 The problem of church-society-communication is regularly discussed at the yearly congress of Pax Romana Christian Professional Forum. The Division of Sacral Communication within the Communication Studies Society also works in this area as a number of conferences, workshops and doctoral dissertations may demonstrate. (Andok 2010; Bokor 2010; Korpics 2008; 2010; 2011; P. Szilczl 2009; 2010; Szentiványi 2008)

12 In the participation theory of communication the concept of scene is not related to physical space but is a complex term in which elements as space, time and ability (knowledge) are involved. All these elements contribute to the realization of the communication event. The scene is a context for the communicative acts. Communication scenes are structured aggregates of agents and abilities where certain institutions (codes) are valid but others are excluded. The structure of the scene is determined by the agents and by the accessible abilities." (Bátori-Hamp-Horányi 2007)

sacral scenes.

The postmodern society had its deep impact on the lives of the churches. The unity of the church was exchanged for the diversity of a great number of small communities and much more emphasis was laid on individualization. A new type of communication and the revision of the concept of unity of the churches were developed (Máté-Tóth 1999, 161-163).¹³ Another factor also plays an important role in the changes in individual and community religiousness. On the part of the individual, getting personal experiences is a decisive social endeavor (c.f. Schulze 1992). This is the motivation behind the form of religiousness that is termed “bricolage” or “patchwork” religiousness by sociologists. (Berger 2004; Tomka 1986). One way of getting experiences is being involved in a community: this is the *communitas* experience described by Turner (1997; Turner-Turner 1978).¹⁴

If churches are considered communities then various types of community existence should be differentiated. The current research will focus on the second and third scenes and churches will be regarded as special communities in the description and analysis. Regarding the church a community does not entail studying formal church communities; but studying the specific features of the religious small communities, associations and movements that are connected to the church.¹⁵ These spiritual movements and small communities are present in the lives of the churches and societies in a subterranean way; still they have a strong cohesive power. The goal of the current research is to study this cohesion. It is related to the questions above: the role and status of the church in the society, and the role of the communities in the life of the society and in the construction and mediation of values. The issue of communities and the related thematizations have recently been emphasized within the Catholic Church. This is first and foremost a consequence of the paradigm shift that took place in the Second Vatican Council.¹⁶ As far as the future and mission of religion and church are concerned, one of the most frequently raised questions is the issue of small communities. The renewal of churches is possible via the renewal of communities only. Thematization and research of religious communities have commenced. First, an inventory on the communities (Ilyés 2009), second, efforts to outline an adequate typology were made (Béres 2010; Tomka Ferenc 1999; Máté-Tóth 1999). Further, studying narratives about the communities has also started. (Máté-Tóth 2010).

13 Wolfgang Huber, a theologian of the Reformed Church has called the attention to the fact that the churches may have a very significant role in mediating between individual and community life (Huber 2002, 15).

14 Group pilgrimage is an effort to experience *communitas* (Pusztai 2000; Korpics 2000; 2011a; 2011b). In his doctoral dissertation Pusztai claims that religious “tourists” escape from the communities that are not able to integrate them and do not offer substantial experiences to search for more authentic experiences (Pusztai 2009).

15 The nature of the attachment and relation is the object of the study.

16 According to a definition by the Catholic Church, the Catholic Church is the church of communities and its essence is *communio*, living and experiencing love and community (Gánóczy 2001; 2006; Lafont 2007; O'Malley 2007; Wildmann 2006).

Churches are representatives of decisive cultural patterns and individual and group behavior models in the society. The cultural patterns and the models to be followed become part of our social reality through values, symbols and symbolic actions. The significance of the current research is twofold: on the one hand, the social environment has changed substantially; and as religion is considered a sub-system of the society (c.f. Luhmann), a sociological approach to study it is plausible. The other approach involves studying the messages that churches communicate to the society. The Catholic Church¹⁷ had very clear-cut messages in the Second Vatican Council, according to which Christians belonging to the Church should study not only the traditions but the signs of the times as well (c.f. Lukács 1997, 7; Horányi 1995).

Communicative manifestations belonging to the first scene (mainly the relationship between the Church and the media) have been in the focus of several studies and their thematizations have been constructed since the transition. The second and the third scenes have not been studied.¹⁸ To study the communities operative in these scenes is important for two reasons: First, a communication research on the social communication of the church can be relevant and adequate only if all the three scenes of operation are taken into consideration. Participation of the church in publicity is determined not only by its presence in the media but by the manifestations of the “representatives”, authentic persons whose communicative activities belong to the other two scenes. As they are considered true representatives, their behavior have a major influence on the public image of the church.¹⁹

In late modern societies, belonging to a community is more and more problematic; individualism is not a problem only in the individual lives but in establishing, maintaining and relating to communities. Communities, in addition to assisting their members' orientation in various scenes of the society may have a major role in confirming certain responses to various questions. This is especially characteristic of religious communities. In Hungary, a great number of religious movements and communities appeared after the transition; and the groups that were already active for a couple of years could strengthen their social positions.²⁰ The religious communities are capable of actively mediating values that are not (or are hardly) represented by other civil organizations. Community life strengthens trust and presents alternative models and values combating

17 Although the churches or church is discussed, the current research focuses on the communities that are either closely or loosely related to the Catholic Church.

18 In the past few years a number of doctoral dissertations were written about communication in the sacral scene (Korpics 2007; Máté-Tóth 2010; P. Szilczl 2009). There are many unexplored areas left.

19 The frameworks of the „media arena” are set by news on scandals, sexual and economic abuse and spoiled campaigns (Aczél 2008; Béres 2010).

20 Szabolcs Ilyés in his doctoral dissertation is writing about the new Catholic movements, analyzing the social and political background of the movements and interpreting them in a religious value field (Ilyés 2008).

the detrimental consequences of eccentric individualism (Christakis- Fowler 2010).²¹ Authentic identification with Christian values and ethics (and this is the mission of the communities) helps respond to the needs of the society that are hardly addressed by other social institutions.

The communities that undertake to strengthen the families have a major role in the mediation and construction of values (Schönstatt, Marriage Encounter, Association of Large Families, „Candle” Community); similarly to communities in which positive features of community life, strengthening social trust, can be experienced (St. Aegidius Community, Association of Large Families, „Chestnut” Community). Sacral communities (Marriage Encounter, The Charismatics, Serra, Neocatechumens) provide a venue to experience authentic Christian life. An important aspect of studying the communities is that the church admitted that its own survival depends on the survival and activity of the religious and sacral communities. Although studying small religious communities has already started in some national research projects,²² a study aimed at analyzing the activities of the religious communities in a rural city and ma p.ng social networks among these communities together with the exploration of their value fields has not been conducted so far.

What would be the theoretical and empirical significance of the current research?

Interdisciplinary explorations, description and analysis in community research. The theoretical background of the study is a communication paradigm; methodologically, the research project relies on anthropological methods of data collection: sociological, anthropological and media methods of analysis will be employed. As a result of the current study the work map of religious and sacral communities in Pecs will be made. Some important elements are to study the goals and programs of the given communities (value map, social capital, and areas of interest for the various communities. Exploring and representing the social network connecting the communities. Studying the types of knowledges (abilities) that are constructed and preserved in the communities and are meant to be transferred. How do these communities contribute to the socialization processes of the individual? How and when do they assist the individuals to orientate themselves in the society?

21 Maria Kopp and her co-workers at the Mental Health Institute of the Semmelweis University have conducted several research projects that examine the role of religion in contemporary society: preservation and construction of values, restoring trust, community research etc. (Kopp- Skrabski 2009; Kopp-Kovács 2006; Török 2008a; 2008b).

22 Works in sociology of religion: Horváth 1995; Kamarás 1989; 1992; 2003; Szántó 1998; Tomka 1990; 1991; 1996. Some of the important references in the theology and religion studies: Boff 1980; Békés 1989; Cserhádi 1981; Dobszay 1991; 1996; Ilyés 2008; Lukács 1985; 1986; 1987; Marosi 1982; Máté-Tóth 1996; Szennay 1982; Tomka F. 1982; 1988; 1988.

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VALLÁSI ÉS SZAKRÁLIS KÖZÖSSÉGEK PÉCSETT

EGY VIDÉKI NAGYVÁROS VALLÁSI ÉS SZAKRÁLIS KÖZÖSSÉGEI ÉRTÉKTEREMTŐ, ÉRTÉKMENTŐ
ÉS A SZOCIALIZÁCIÓBAN BETÖLTÖTT SZEREPÉNEK VIZSGÁLATA

(ELŐKÉSZÍTŐ TANULMÁNY)

Korpics Márta

A kutatás nemzetközi és hazai vonatkozó kontextusa két irányból közelíthető meg. Az egyik irány a vallás és társadalom viszonyának megváltozott körülményeire reflektál, a másik a közösségek és társadalom viszonyára. Az utóbbi években a hazai kommunikációkutatáson belül kijelölődtek azok a keretek, amelyekkel a vallás és kommunikáció, egyház és társadalmi kommunikáció különböző viszonyait vizsgálni lehet. Ez a kutatás az egyházak társadalmi kommunikációjában való részvételének két színterét vizsgálja: az egyház belső színterét, és a szakrális kommunikáció színterét. A kutatás fő kérdése: melyik közösség milyen válaszokat tud megfogalmazni és felmutatni a késő-modern társadalom aktuális problémáira: bizalom-hiány, családok helyzete, közösségi lét, gyerek-nevelés, részvétel a civil társadalom működtetésében.

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Preface

The volume is dedicated to publish the reviewed foreign language studies made by the qualified PhD candidate professors of the Teacher Training Institution. The authors give a taste of their long-run researches on fields of pedagogy, psychology, psycholinguistics, history of education and special education. While examining actual issues, the studies fulfil the gaps in the scientific literature and teacher training.

In the study “The Psycholinguistic Aspects of the Bilingual Children” the author demonstrates ways and methods which can lead to the formation of bilingualism, and also outlines the advantages and disadvantages of bilingualism. The author of “The Correlation between the Special Learning Disability (dyslexia) and Intelligence Structure” points out that the picture of the intelligence structure in case of children with dyslexia is typically scattered, heterogeneous. In the scientific study “Developing Personal and Social Competence with Games in the Training of Nursery Teachers” the author proves the effective and successful competence-developing affects of games. While focusing on the unique values of the first institutionalized physical education in Hungary, the author of “The Inheritance of the German and Hungarian Physical Education” uses iconographic research methods in his analyses. With the historic research on the specific field of physical education, the writer emphasizes the push of healing therapy, healing gymnastics and healing physical education as well as the significance of the healing and physical education training.

Each of the studies in the volume highlights the need to create physical and mental harmony, demonstrates the opportunities which lie in the diagnostics, education and development as well as in the teacher training, and give assistance for the educator profession and practice.

Rózsa Kurucz CSc
editor

IMRE BÚS:

DEVELOPING PERSONAL AND SOCIAL COMPETENCIES BY GAMES
IN NURSERY TEACHER EDUCATION

ÁGNES KLEIN:

PSYCHOLINGUISTISCHE ASPEKTE DES KINDLICHEN BILINGUALISMUS

RÓZSA KURUCZ:

DAS ERBE DER DEUTSCHEN UND UNGARISCHEN KÖRPERERZIEHUNG

ANIKÓ CHRISTIÁN:

INTRODUCTION TO THE HISTORY OF ADOPTED PHYSIOLOGICAL EDUCATION

GABRIELLA KIRÁLY:

THE RELATIONSHIPS BETWEEN THE SPECIFIC LEARNING DISORDERS
AND THE INTELLIGENCE STRUCTURE

DEVELOPING PERSONAL AND SOCIAL COMPETENCIES BY GAMES IN KINDERGARTEN TEACHER EDUCATION

IMRE BÚS

Abstract

New educational methods should be applied if we want to meet the new demands of today's knowledge-based society. One of these methods is the competency-based education. It is also used in our training of kindergarten teachers to meet the requirements of training and outcome. Our students are trained by one of the feasible means of competency development, the game, which, according to our experience, seems to be very effective and fruitful.

1. New socio-economic demands

Our present day society and economy place new requirements on individuals and institutions. Societies today will be more successful and competitive as a result of their acquired knowledge rather than because of their geographical location, population or natural resources, i.e., knowledge-based society has come into existence. It is also featured by the need for new methods and organizational forms to gain and continuously develop knowledge.

2. New ways to acquire knowledge

2. 1. Renewal of formal learning

The formal, institutional learning and teaching have been undergoing continuous reformation and renewal since the second half of the 19th century. Reformatory and alternative pedagogic movements and schools tried and are still trying to implement minor or major, more radical changes, which spread in other schools to a certain extent, but did not result in fundamental changes in the educational system. The project method, learning contract, co-operative teaching and games are regarded as new methods.¹ In practice, however, classical methods still dominate such as lectures and explanations. Unfortunately, the traditional class-subject-lesson system, huge curriculum and cast-iron frames have adverse impact on new methods. The effectiveness of the learning process has been researched for a long time. Applying the “methodology of learning” in language training classes (0th grades) at secondary schools and in some other subjects facilitates the acquisition process. It should be used in every subject and all grades.

Apart from developing educational methods and learning techniques, there are new

instructional strategies helping the development of pedagogy. Differentiation, small group work and individual learning and teaching enhance effectiveness. Without motivation, however, there is little chance of success. Joint family, institutional and subject-class motivation can only provide real help. It will establish students' activity and the interiorization of the need for acquisition.

2. 2. The increasing role of non-formal and informal learning

Acquiring knowledge outside the education system, i.e., non-formal learning, for example in different courses, study circles and clubs is gaining higher significance in an abundance of opportunities. The role of informal learning in the course of everyday activities has also increased. Instead of books, periodicals, radio and television, it is the computer and the Internet having the highest effect on both children and adults. Non-formal and informal learning is being increasingly researched and applied in practice.

2. 3. Competency-based education

There is another possibility: the competency-based education. In a common sense, competence means ability. It is interpreted as an individual's skills, proficiency, experience and ability in a certain field of life.

Technical literature provides several definitions on the concept of competence, which is presented in pedagogical literature as the combination of knowledge, skills and attitudes.²

3. *Fields of competence*

Competencies have been systematized in several ways. They are described in the Québec Program comprehensively for pedagogical application:

- intellectual competencies - using information, problem solving, critical judgement, creativity;
- methodological competencies- adopting effective work methods, using information and communications technologies;
- personal and social competencies- identity, cooperation with others;
- communicative competencies.³

From the above-mentioned, the development of personal and social competencies is described in the following chapter as they are essential in the work of nursery teachers dealing with young children.

4. *Developing personal and social competencies by games in kindergarten teacher training*

Extracts from the education and outcome requirements of the nursery school teachers' BA degree (EOR)

According to professional attitudes and behaviours, nursery teachers are required to have:

- „the abilities of self-recognition, self-assessment, self-assertion and self-management”;
- „knowledge of children and adults, child-centred approach, playing skills”;
- „high communication skills”;

- „social sensitivity, sense of communal responsibility and the ability to take responsibility”;
- „cooperative skills for teamwork”⁴

The game as a potential tool for competency development

Competencies can be developed by several programmes and methods. One of the possibilities is using games. Why is the game a suitable tool?

As games are interesting activities for us, we do them driven by intrinsic motivation. We love doing them as we have the mood for these activities. That is why adopting games in the development creates cheerful, motivated activities. The learning process and development speed up, become easier and more enjoyable. Participants are more active and volunteer to do the tasks. They take part in developing activities unprompted without the pressure of external force.

Games are also popular because the tasks are adjusted to the participants' state of development, thus they can act at an optimal level. Thus, development is suited to the individuals, in a differentiated way. The same practice was already used in the first kindergarten when they chose different pieces of gymnastics equipment tailored to the children.⁵ The way of carrying out the tasks is also helped by games. They control and regulate the participants' behaviour. The rules of games and the roles determine the conditions which have to be accepted so that children can take part in the activities they like.⁶

Extracts from the education and outcome requirements of the nursery school teachers' BA degree (EOR)

There are Self-knowledge and Playing skills development trainings provided for college students so that they can meet the requirements quoted from the EOR above at Illyés Gyula Faculty of Education of the University of Pécs. I will not present the whole educational training here, only its structure, interconnections and procession highlighting the places and roles of some games in the development.⁷

4. 1. Developing self-knowledge, self-acceptance and self-expression

We can create different sequences and syllabuses of games. One of the suitable forms is the time. First we can play the “*Walk-of-life map*”, which runs from the past events from our life to the present. It can be followed by the game “*10 years later*”, investigating what the players' lives will be like in ten years' time according to their ideas. Some other games are about the current period of time. The game “*24 hours*” explores our daily time consumption. Some players may be surprised at calculating how much time they moon away a day. The game “*Names*” reveals an important element of self-knowledge and self-identity: acceptance of our names, problems with them or complete refusal. We can hear several interesting stories in the conversations. They are also particularly edifying to one another as some problems with not only first names but with surnames, even nick names and also some oddities might be revealed. Comparing ourselves with others, realising the similarities and differences can be helped by the game “*What is common,*

what is different". It can be followed by "*Making your own coat of arms*" which aims to raise self-awareness, and the "*Advertisement*" when inner characteristics are unfolded and become transparent. Our self-image is confronted with the others' opinions and we can develop more realistic self-knowledge. In some cases it can even be astounding when we utter, draw or act out something about ourselves which we have never thought about before.

4. 2. Personality and ability development (self-development)

We use perception, memory, fantasy, motion and talking games for personality and ability development. The players enjoy trying out exercises associated with touch, smell, taste, sight, hearing and the sense of time and space, as they are to gain primary experience about the physical world. For example, a kind of scent or taste can be interesting not only because of the perception itself, but it may recall memories and experiences, which also help to get to know yourself and the others. The players find the time and space perceptive games interesting as our movements in time and space have an essential importance in our everyday life. There are several games to improve memory. The games "*What has changed?*" and "*Objects on the table*" help to memorize objects; "*Unfolding a story*" for the sequence of time; "*Add a motion*" and "*Add a word*" help players with their effective movement and verbal memory. Writing and telling stories individually and in teams improve fantasy and creativity. They can use their imagination in several games in connection with their experiences and objects. Games like "*Touch wood!*" "*Chairman, secretary*", "*The secret conductor*" and "*How do you like your neighbour?*" involve significant aspects of the order of movements, direction, change, rhythm and attention in motor-skills development. These games are very interesting and stirring. Being regular games, they are also suitable for children to psych up to other activities as they end the previous ones and establish a playful and pleasant atmosphere in the group. The "*Hotel doorman*" and "*The key of the situation*" games prepare for drama activities.

For verbal development it is useful to apply games like "*Black-white-yes-no*", "*Swap!*", "*One minute is yours*", "*Look around and talk about it*" as teenagers and youths can improve attention, ordering, persistence, their fluent verbal expression and transform their experiences into words with them.

4. 3. Knowing of peers, relationship development

The life of a group- club, study circle, class or a group of friends- highly depends on how the relationship works. When establishing and forming a new group, or the old group takes up a new activity, the contact among peers is helped by an actuating, initiative conversation. A successful first talk and games like "*Learning names*" and "*Introduction with the help of a peer*" establish the further development of contacts. The pair and group games support the understanding of others, considering the peers' interest and aspects, tuning up to one another and empathic actions. Competitiveness also appears in the group, but members have to keep the rules to fight. The following games are suitable to fulfil our goals: "*What would I become if ...*", "*Imaginary gift*", "*Boys are like this, girls are like that*", "*Mirror game*", "*Drawing in pairs*", "*Blindfold guide*", "*The pirate's treasure*".

4. 4. Community development

Games of community development challenge the cooperation of the whole group playing together. Cooperation as a means and also a hidden goal appears in games like “*Common symbol, coat of arms*”, “*The trap*”, “*Ravel*”. Complete cooperation is realised in the games “*The island*”, “*Our house*”, “*Jackpot*” and partly in “*Common drawing*” as everybody takes part in solving the problem, and absolute agreement is required to find the clue. Spatial sociometry can illustrate the players’ actual group relationships. Cooperation is fulfilled in dramatic activities in the case of “*Situational games*”, “*The text remains*” and “*Role plays*”.

Observations

According to the feedback and our experience, adopting games is a suitable method to develop college students’ competencies in nursery teacher education including their personal and social competencies. The training has been proved to be successful. It cannot be supplemented by lectures; it must be experienced with actions. The students are motivated, enthusiastic and active. In sheltered environment – as we are among ourselves – they become more courageous and more open to development and improvement. Our aim is to continue this successful practice and make some further improvements. It is our pleasure to recommend our work to the attention of other institutions and colleagues.

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Publisher's Reader: **Dr. Kurucz Rózsa CSc**
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SZEMÉLYI ÉS SZOCIÁLIS KOMPETENCIÁK FEJLESZTÉSE JÁTÉKKAL
ÓVODAPEDAGÓGUSOK KÉPZÉSÉBEN

Bús Imre

Abstract

A mai tudásalapú társadalom követelményeinek jobban megfelel, ha a tudás megszerzésének új módszerei kerülnek felhasználásra. Ennek egyik formája a kompetencia alapú oktatás. Az óvodapedagógusok képzésben is alkalmazásra kerül ez, annak érdekében, hogy a képzési és kimeneti követelmények teljesíthetők legyenek. A kompetenciafejlesztés egyik lehetséges eszközével, a játékkal fejleszthetők a hallgatók a tréningeken, amely a tapasztalat szerint hatékony és eredményes.

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PSYCHOLINGUISTISCHE ASPEKTE DES KINDLICHEN BILINGUALISMUS

AGNES KLEIN

Abstract

Nach Skutnabb-Kangas¹ gibt es so viele Definitionen über die Zweisprachigkeit, wie viele Forscher sich mit dem Thema beschäftigen, trotzdem kann auf eine umfassende, das Phänomen erklärende Erklärung nicht verzichtet werden. Schon an die Erscheinung Zweisprachigkeit kann von vielen Seiten herangegangen werden. In der vorliegenden Arbeit werden vor allem die Ergebnisse der Psycholinguistik in den folgenden Themenbereichen herangezogen: Das Entstehen der Zweisprachigkeit, die Situation der Sprachen im Gehirn, sowie die Vor- und Nachteile der Zweisprachigkeit. In den Mittelpunkt wird der kindliche Zweitsprachenerwerb gerückt.

Definitionen über die Zweisprachigkeit

Der Begriff der Zweisprachigkeit kann sich auf Personen, Gruppen, Gemeinschaften, sogar Gesellschaften, oder auf das Phänomen beziehen, wenn diese Personen, Gruppen Gemeinschaften in ihrem Umfeld zwei (mehrere) Sprachen in ihrer alltäglichen Kommunikation verwenden. Auch aus diesem Grunde wird der Bilingualismus sehr oft auf Grund der Sprachkenntnisse der Sprecher definiert. Diese Definitionen variieren sich vom Niveau der muttersprachlichen Kenntnisse für beide Sprachen (z.B. Bloomfield²) bis zu den minimalen Erwartungen an die Sprecher, wobei in der zweiten Sprache minimale Kenntnisse erwartet werden (siehe z.B. Diebold³). Andere legen die Betonung auf die Beherrschung der 4 Fertigkeiten in der zweiten Sprache (MacNamara⁴).

Laut Weinreich⁵ bedeutet zweisprachig zu sein: „The practice of alternately using two languages will be called BILINGUALISM, and the persons involved, BILINGUAL.“

Grosjean⁶ nähert sich an den Bereich Zweisprachigkeit holistisch: „Zweisprachigkeit bedeutet den Gebrauch zweier (oder mehrerer) Sprachen, und zweisprachig sind Menschen, die in ihren Alltags zwei (oder mehrere) Sprachen für ihre Kommunikation benötigen und sie auch gebrauchen.“ Grosjean⁷ betont auch, dass eine zweisprachige Person nicht die Gesamtheit von zwei einsprachigen Personen in einem Körper ist. Typisch für einen Zweisprachigen ist die Arbeitseinteilung zwischen den beiden Sprachen, so dominiert die eine in einer und die zweite Sprache in einer anderen Situation. Dies kann bei codeswitching beobachtet werden.

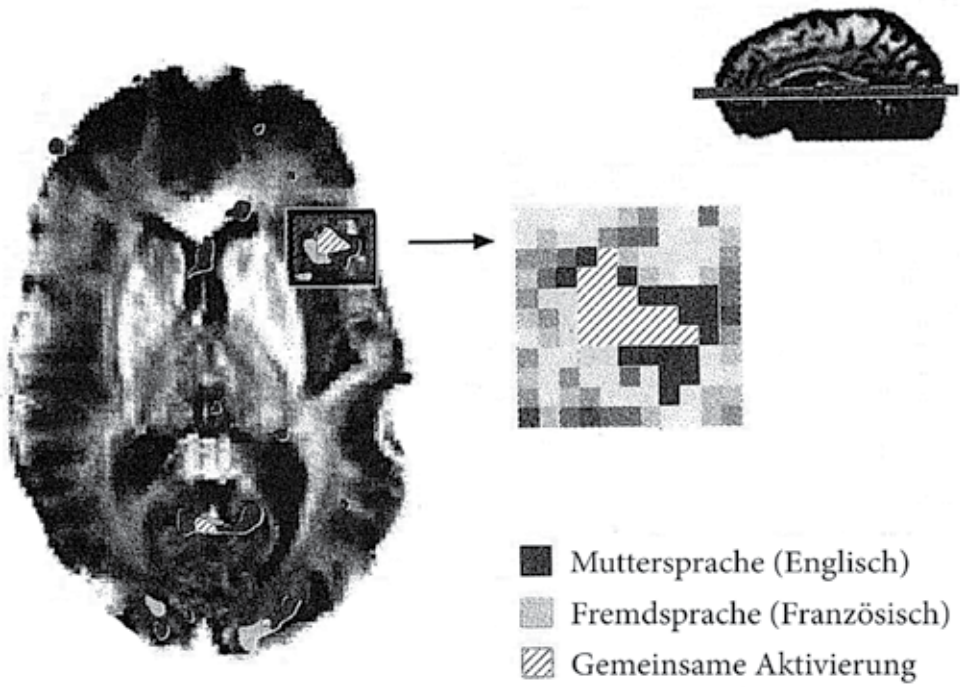
Skutnabb-Kangas⁸ Auffassung von der Zweisprachigkeit bezieht sich nicht nur auf die Sprachkenntnisse, oder auf den Sprachgebrauch, sondern beschreibt den idealen

Zustand der Zweisprachigkeit: „Zweisprachig ist die Person, die in einer mehrsprachigen Gemeinschaft in der Lage ist, in zwei (oder mehr) Sprachen auf muttersprachlichem Niveau zu kommunizieren, der kognitiven und kommunikativen Kompetenz der Person entsprechend, vorgeschrieben von den sozio-kulturellen Anforderungen Personen oder der Gemeinschaft, und die sich auch mit den sprachlichen Gruppen und den Kulturen oder mit deren Teilen identifizieren kann.“

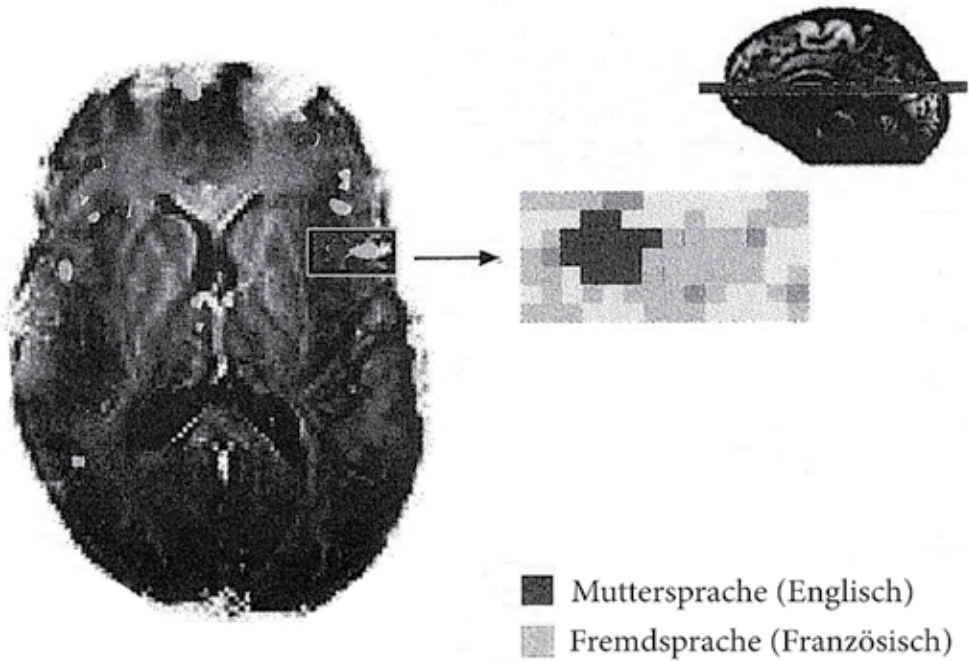
Zwei Sprachen im Gehirn

Der Begriff Zweisprachigkeit verfügt über mehrere Erklärungen. Viele Forschungen fokussieren auf die Representation beider Sprachen im Gehirn. In diesem Bereich gibt es heute ein großes Forschungspotential, dank den neuen technischen Errungenschaften der letzten Jahrzehnte, die neue Perspektiven vor der Neurolinguistik eröffnen, und in deren Fokus die Sprechaktuntersuchungen, sowie die Forschungen über das zweisprachige Gehirn rücken.

Frühere Studien beweisen eindeutig, dass im Falle Zweisprachiger die rechte Hemisphäre stärker am Gebrauch sprachlicher Funktionen beteiligt ist als bei Personen, die eine Sprache beherrschen⁹. Die Lage der beiden Sprachen im Gehirn im Verhältnis zueinander, hängt weniger vom Zeitpunkt des Erwerbs, viel mehr von dem erreichten Niveau ab. Bei den Menschen, die die zweite Sprache im Vergleich zur ersten auf einem wesentlich niedrigeren Niveau sprechen, zeigt das Aktivationsmuster des Gehirns wesentliche Unterschiede, aber nur bei der Perzeption, und nicht bei der Sprechproduktion. Bei Menschen, die die beiden Sprachen auf gleichem Niveau beherrschten, unabhängig vom Alter des Spracherwerbers, war das Aktivationsmuster gleich. Die Sprachkompetenzen in der zweiten Sprache waren ausgebaut, wie die in der ersten.¹⁰ Die folgenden Bilder wollen die obigen Aussagen unterstützen. Auf ihnen ist zu erkennen, dass die Sprechrepresentation beider Sprachen bei Leuten mit großen Unterschieden in ihren Sprachkenntnissen verschieden abläuft (Siehe Abb. 2), während wir auf dem zweiten Bild in der Sprechrepresentation beider Sprachen, die gleich gut beherrscht werden, eine große Überlappung sehen können¹¹ (Siehe Abb. 1).



Abbild 1: Sprechrepräsentation bei frühen Zweisprachigen



Abbild 2: Sprechrepräsentation bei Menschen mit unterschiedlichen Kenntnissen beider Sprachen

Eine weitere, zentrale Frage der Forschungen ist, in wie fern die Tätigkeiten, die von Menschen ausgeübt werden, die Struktur unseres Gehirns verändern. Untersuchungen, durchgeführt mit Musikern oder mit Menschen, die Sprachen lernten oder andere Tätigkeiten ausübten usw., beweisen den Einfluss dieser Tätigkeiten auf das Gehirn. Laut Untersuchungen, die im Kreise von 70 Jährigen durchgeführt wurden, bleibt die Memorie der Zweisprachigen viel länger heil, als dies bei Senioren, die eine Sprache sprechen, der Fall ist¹². Laut Navracics¹³ vollzieht sich die Veränderung in der Struktur des Gehirns. Die Zweisprachigkeit verursacht dementsprechend eine strukturelle Neuordnung in der Gehirnstruktur auf der neurologischen Ebene, stellt Csaba Pléh¹⁴ fest, der sich auf die Untersuchungsergebnisse von Mechelli, Crinion und Kollegen¹⁵ stützt. Die Größe der strukturellen Umordnungen, wie wir es bereits feststellen konnten, hängt vor allem davon ab, auf welchem Niveau sich die Person die gegebenen Tätigkeiten aneignete. Mechelli¹⁶ beweist die Vergrößerung der grauen Substanz bei Zweisprachigen im Parietallappen im Großhirnrind. Die Vergrößerung ist bei den frühen Zweisprachigen bedeutender. Es gibt ebenfalls eine Korrelation zwischen den Sprachkenntnissen und dem Ausmaß der Vergrößerung. Mit Hilfe der VBM-Methode wird sichtbar, dass die Zweisprachigkeit auch auf makroskopischer Ebene strukturelle Veränderungen hervorruft, und dies beeinflusst nicht nur die funktionale Anatomie des Gehirns, wie es vor Jahren vermutet wurde.¹⁷

Allem Anschein nach konkurrieren die für die Aneignung der Zweitsprache verantwortlichen Neuronen miteinander im Bereich des frühen Erstspracherwerbs. Aus der Hinsicht der Neuronen ist die Erstsprache in jeder Person einheitlicher. Die bilingualen Personen, die über eine ausgewogene Zweisprachigkeit verfügen, können in beiden Sprachen kompakte und unabhängige Bereiche entwickeln.¹⁸

Einen Mittelpunkt der Bilingualismusforschung bildet die Speicherung beider Sprachen im Gehirn. Weinreich¹⁹ unterscheidet 3 verschiedene Typen:

1. koordinierter Bilingualismus: Wörter beider Sprachen werden getrennt voneinander gespeichert, und jedes Wort hat seine in der anderen Sprache equivalente Bedeutung. Den Kontext der Aneignung untersuchend kann festgestellt werden, dass beide Sprachen in unterschiedlichen Umgebungen erworben wurden (z.B. zu Hause und im Kindergarten)

konzeptuelle Ebene: book kniga

2. kombinierter Bilingualismus: Die Wörter verfügen über dieselbe Bedeutung: book-kniga. Für eine Bedeutung verfügt die zweisprachige Person über zwei Ausdrücke. Diese Person erwarb die Sprachen in einem Kontext. (z.B. binationale Ehe der Eltern – eine Sprache-eine Person).

Konzeptuelle Ebene: book = kniga

3. subordinativer Bilingualismus: Die bilinguale Person interpretiert die Bedeutung der Begriffe der untergeordneten Sprache durch die übergeordnete Sprache. Wenn ein Kind die eine Sprache früher, die zweite nachhinein erlernt, verbindet es die Wörter der

zweiten Sprache mit den Begriffen durch die erste Sprache.

Konzeptuelle Ebene: book

Lexikalische Ebene: /buk/

/knyigá/

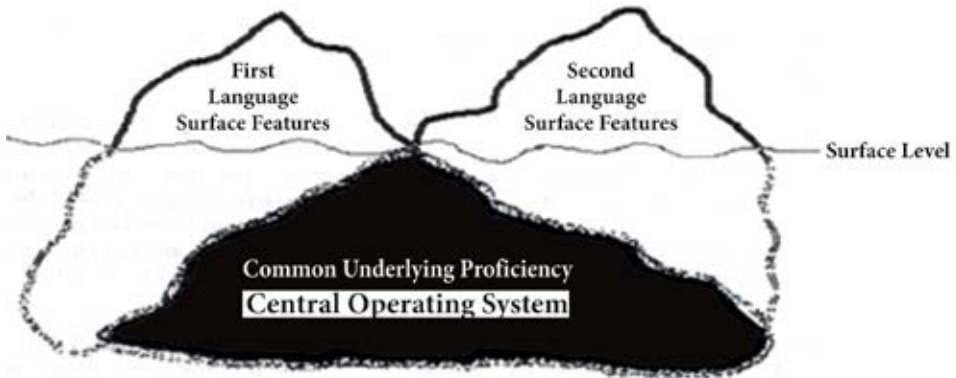
Navracscics²⁰ betont, dass das mentale Lexikon die Speicherung der Sprachen auf allen sprachlichen Ebenen sichert, und dass es die Brücke zwischen Form und Bedeutung ist. Seine Zusammensetzung ändert sich ständig, so kann mit der Zeit aus einem koordiniertem Zweisprachigen ein zusammengesetzter Zweisprachige werden. Die Voraussetzungen für die Veränderungen sind der Gebrauch oder eben der Nichtgebrauch der gegebenen Sprache. Auf der einen Seite verursacht die Vervollkommnung der Sprachkenntnisse direktere Kontakte zwischen Wort und Bedeutung, also ist die Anwesenheit der ersten Sprache als Vermittlersprache immer weniger wichtig; auf der anderen Seite ist der Zustand der Zweisprachigkeit nicht beständig, es können gegensätzliche Veränderungen vollzogen werden, wie das Vergessen einer Sprache, weil sie nicht geübt wird. (Use it, or lose it).

Experimente²¹ beweisen, dass die Vorüberlegungen und die Schnelligkeit der lexikalen Entscheidung davon abhängig sind, ob sie in der zweiten oder in der ersten Sprache vollzogen werden. Die lexikale Entscheidung in der ersten Sprache geschieht viel schneller, ebenso erfolgen die negativen Vorüberlegungen dann, wenn die erste Sprache betroffen ist; im Falle von L2-L1, L2-L2 nicht. Der Grund dafür ist die stärkere Abhängigkeit der zweiten Sprache von der ersten.

Laut Singleton²² und Cook²³ speichert das mentale Lexikon die beiden Sprachen nicht vollkommen integriert, denn zweisprachige Personen sind in der Lage, die beiden Sprachen voneinander zu trennen; aber auch nicht vollkommen getrennt, denn die beiden Sprachen befinden sich schließlich in einem Gehirn.

Grosjean²⁴ arbeitete das bilinguale Modell des lexikalen Erkennens (BIMOLA) aus, dessen Sinn darin besteht, dass der zweisprachige Sprecher wahrscheinlich über zwei Sprachsysteme verfügt, die einerseits voneinander unabhängig sind, anedererseits miteinander doch auch in Verbindung stehen. Einerseits ist der abgesonderte Gebrauch der beiden Sprachen möglich, andererseits kann er die gerade nicht benutzte Sprache nicht vollkommen ausschalten. Im Weiteren nimmt er an: Wenn der Zweisprachige monolinguale Sprechweise praktiziert, dann ist die eine Sprache stark und die andere Sprache nur schwach aktiviert. Ähnliches stellte Paradis²⁵ in seiner Untersystem-Hypothese fest: Weil die beiden Sprachsysteme in diversen Kontexten vorkommen, bringen sie deshalb eine verschiedene Vernetzung der Kontakte hervor. Dank dieser Tatsache entsteht ein Untersystem im übergreifenden System. Also hat jede Sprache ein neurologisches Kontaktsystem, das in einem größeren System vorkommt. Aus diesem System kann der Benutzer jede Zeit jede Sprache wählen.

Cummins²⁶ nimmt einen zentralen gemeinsamen Leitmechanismus in Form von einem Eisberg im Falle von Zweisprachigen an (Siehe Abb. 3):

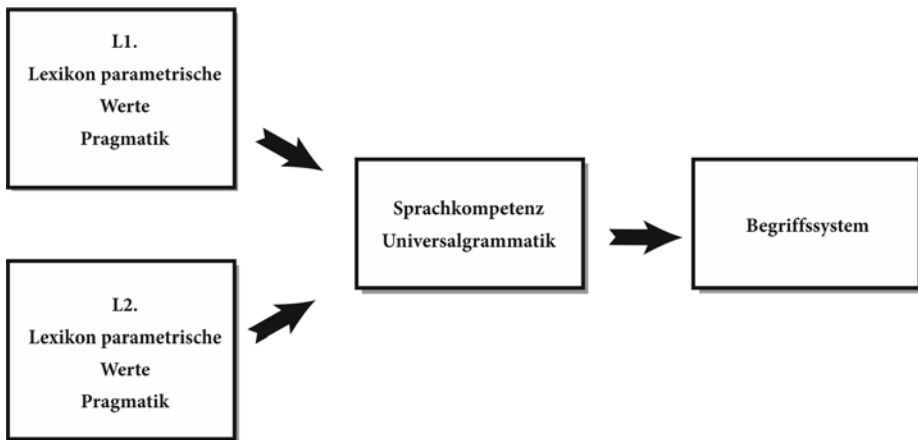


The Iceberg Analogy

Abbild 3: Die Eisberg Analogie

Zweisprachige Personen formen nach dem obigen Modell einen gemeinsamen Regelkern in sich, der am Anfang für alle zwei Sprachen gemeinsam ist. Im Laufe eines Differenzierungsprozesses kommen sie in Besitz von spezifischen und komplexen Regeln, die sich auf die beiden Sprachen getrennt beziehen.

Bialystock – Hakuta²⁷ veranschaulichen folgenderweise die Speicherung der beiden Sprachen im mentalen Lexikon (Siehe Abb. 4):



Abbild 4: Speicherung beider Sprachen im mentalen Lexikon

Aneignung der Zweitsprache: Wege, Möglichkeiten

Kein Kind ist mit einem Sprachsystem zum Erwerb von einer oder von zwei Sprachen geboren worden. Am Anfang ist es nicht einmal darauf eingestellt, die Codes einer bestimmten Sprache anzueignen, sondern je nach der Umgebung wird es mit dem Input einer oder mit zwei Sprachen konfrontiert. Diese Inputs muss das Kind aufbereiten, die sich als Konstruktion der Akkomodation und der Assimilation wegen der Auswirkung der kognitiven Reifung und der Lenkung der sozialen Umwelt langsam in zwei Sprachen trennen.²⁸

Die Erziehung in einer zweisprachigen Umwelt verursacht das Entstehen der kindlichen Zweisprachigkeit. Diese Umwelt kann aber sehr verschieden sein²⁹ Sie wirkt sehr stark auf das Entstehen oder die Abweisung der Zweisprachigkeit. Solange Kinder, die in einsprachigem Milieu aufwachsen, die von der Umwelt abweichende Sprache aus sozialem Konformismus, oder wegen Vorurteile abweisen, können ethnische Konflikte die Abweisung in zweisprachigem Umfeld lebender Kinder verursachen.³⁰

Tove Skutnabb-Kangas³¹ stellte die folgenden Typen, wie man als Einzelperson zweisprachig werden kann, fest:

- elite Zweisprachigkeit (Internat, durch Arbeit usw.): Das Ergebnis einer freien Entscheidung, die Umgebung verhält sich positiv zu den Kindern.
- Kinder von Familien der sprachlichen Mehrheit: Typische Einstellung offener Gesellschaften gegenüber dem Anderssein, wo der effektive Unterricht eine wichtige Rolle im Prozess zum Zweisprachig-Werden spielt, und eine freie Entscheidung ist.
- Kinder, die in zweisprachigen Familien aufwachsen: Die verschiedenen, emotionalen und kommunikativen Kontakte zu den Elternteilen motivieren die Kinder zum Erwerb der beiden Sprachen.
- Kinder, die einer sprachlichen Minderheit angehören: Ein starker Druck erscheint von der Seite der Gesellschaft vom Staat zur Aneignung der Staatssprache, insbesondere in den weniger toleranten Gesellschaften, wenn die Unterstützung der Minderheitensprache zu gering ist.

Die Aneignung der beiden Sprachen, wenn sie gleichzeitig stattfindet, kann durch 3 Entwicklungsphasen charakterisiert werden:

1. Das Kind entwickelt als Erstes einen Wortschatz, der die Elemente beider Sprachen beinhaltet. Selten treffen wir dabei Wörter mit equivalenter Bedeutung aus beiden Sprachen.
2. Beim Erscheinen der Zweiwortsätze können in den Sätzen Wörter aus allen beiden Sprachen gefunden werden, aber im Laufe der Zeit sinkt diese Sprachmischung sehr schnell. Ein dreijähriges Kind mischt die Sprachen in etwa 30%, aber zum Ende dieses Lebensjahres beträgt der Prozentsatz nur 5%.
3. Mit der Erweiterung des Wortschatzes erscheinen die equivalenten Wörter in beiden Sprachen. Aber das Aneignen der verschiedenen grammatischen Regeln lässt noch auf sich warten. Die Kinder benutzen ein Regelsystem, und dann entwickeln sich bei ihnen die zwei verschiedenen Regelsysteme. Bis zu seinem zweiten Lebensjahr verfügt es über ein Lexikon und syntaktisches System, dann in etwa zu seinem 5. Lebensjahr sondert sich das Lexikon ab, und schließlich auch das syntaktische Regelwerk.³²

Ähnliche Wege zeigt das Dreiphasen-Modell von Taeschner³³ auf, wo zwei italienisch-deutschsprachige Mädchen beobachtet werden. Dabei wird festgestellt, dass die Mädchen in der ersten Phase über ein gemischtes, lexikalisches System verfügen, das aus beiden Sprachen Wörter erhält. In der zweiten Phase versuchen sie die zwei Sprachen voneinander zu trennen und äquivalente Wörter in beiden Sprachen zu verwenden. In der dritten Phase geschieht die Trennung beider Sprachen in den Bereichen Syntax und Lexik.

Durch die neuesten Untersuchungen von Kovács – Mehler³⁴ verfeinert sich das Bild vom Spracherwerbsprozess der Zweisprachigen weiter. Alle Zeichen weisen auf die Tatsache, dass die Unterscheidung der sprachlichen Zeichen bei Babys, die in zweisprachigem Umfeld aufwachsen, schon auf der prälexikalen Ebene beginnt.

Laut Jusczyk³⁵ können Säuglinge mit 6 Monaten die gehörten zwei Sprachen auf Grund ihrer prosodischen Merkmale voneinander unterscheiden. Je ähnlicher die beiden Sprachen einander sind, desto länger dauert die Zeit zur Unterscheidung.

Ronjat³⁶ gehört zu den ersten, der die zweisprachige Erziehung seiner Kinder dokumentiert. Er verwendet in der französisch-deutschsprachigen Erziehung seiner beiden Töchter das Prinzip eine Sprache-eine Person. Später beschreibt Leopold (1939) detailliert die zweisprachige (englisch-deutsch) Entwicklung seiner Tochter Hildegard. Er beobachtet, dass es zuerst ein gemeinsames Lexikon für beide Sprachen gibt, dann wird das Kind fähig, beide Sprachen voneinander zu trennen.

Die nächste Tabelle (Siehe Abb. 5) untersucht die sprachliche Entwicklung zweisprachiger Kinder und vergleicht sie mit der durchschnittlichen Entwicklung eines einsprachigen Kindes:

Untersuchung	Teilnehmer	Einwortsatz	Die ersten fünfzig Wörter
Kielhöfer–Jonekeit ³⁷	Deutsch–Französisch	15 Monate	1;6-1;9 Jahr
Leopold ³⁸	Deutsch–Englisch		1;6 Jahr: Deutsch 24, Englisch 36 Wörter
Volterra–Taeschner ³⁹	Deutsch–Italienisch		2 Jahr: Deutsch: 25, Italienisch: 38 Wörter
Volterra–Taeschner ⁴⁰	Deutsch–Italienisch		1,6 Jahr: Deutsch 33, Italienisch: 27 Wörter
Felix ⁴¹	Deutsch–Englisch	1;4 Jahr: deutsch: 2, englisch:8 Wörter	
Butzkamm ⁴²	einsprachig Deutsch	10-1;6	zw. 22-30 Monate

Abbild 5: Wortschatzentwicklung von zweisprachigen Kindern und von einem einsprachigen Kind

Auf Grund obiger Beispiele zeigt die Sprechentwicklung zweisprachig erzogener Kinder keine Verspätung im Vergleich zu den einsprachig erzogenen. Auch internationale

Erhebungen unterstützen diese Behauptung. Oller et al⁴³ untersuchen den Anfang der Lallperiode bei 73 monolingualen und bilingualen Kindern, und finden keine Unterschiede. Dies bezieht sich auf das Aussprechen des ersten Wortes, sowie auf die Quantität der Wörter; die Ergebnisse der zweisprachigen Kontrollgruppe befinden sich irgendwo zwischen Kindern, die die besten und schlechtesten Ergebnisse erreichen.⁴⁴ Laut De Houwer⁴⁵ verlaufen die Phasen der Sprachentwicklung ein- und zweisprachiger Kinder ähnlich.

Bei zweisprachigen Kindern entwickeln sich beide Sprachen den sozialen Wirkungen und den Wirkungen der Umwelt entsprechend. Die Quantität und die Qualität (Natur, also welche Wörter) der erlernten Wörter hängen davon ab, unter welchen Außenumständen sie benutzt werden.

Das grammatische System zweisprachiger Kinder entwickelt sich wie das der einsprachigen Kinder ihres Alters.⁴⁶ Kielhöfer und Jonekeit⁴⁷ entdecken bei der Beschreibung der sprachlichen Entwicklung der beiden Söhne, Jens und Olivier zwei Prinzipien, die die grammatische Entwicklung der Kinder charakterisieren. Auf der einen Seite das Prinzip der Häufigkeit, auf der anderen Seite das der Verständlichkeit, oder Kompliziertheit beeinflussen das Aneignen des gegebenen grammatischen Systems. Als Beispiel für die Entwicklung des grammatischen Systems der beiden Söhne kann die Bildung der Konjunktivsätze erwähnt werden, die sich in der deutschen Sprache wegen der Kompliziertheit des Französischen schneller vollzieht. Olivier bildet diese Sätze mit 4,11 Jahren richtig auf Deutsch, doch bedeutet die Bildung dieser Konstruktion auf Französisch mit 5 Jahren Probleme.

Die Frage der Aufeinanderwirkung und die Sprachmischung beider Sprachen können mit dem Interesse eines breiten Publikums rechnen. Kielhöfer und Jonekeit⁴⁸ analysieren detailliert den zweisprachigen Entwicklungsprozess ihrer Kinder. Nach ihrer Feststellung entstand ein zweisprachiges Bewusstsein bei den Kindern, als sie 2-2,5 Jahre alt waren. Sie waren dessen so bewusst, dass wenn ein Elternteil in der Sprache des anderen den Kindern etwas mitzuteilen versuchte, war das Kind irritiert, überrascht, oder hielt es für witzig.⁴⁹ Diese Tatsache zeigt die Trennung der beiden Sprachen.

Ein natürlicher Vorgang ist es, wenn sich die beiden Sprachen in verschiedenem Tempo auf verschiedene Art und Weise entwickeln. Eine Ausnahme bedeuten die Kinder, bei denen die sprachliche Entwicklung sehr ausgewogen verläuft, also sich alles auf einmal in beiden Sprachen vollzieht.⁵⁰ Es kann sich eine starke und eine schwache Sprache entwickeln. Die Kinder können die fehlenden lexikalen und strukturellen Mittel in der schwachen mit Hilfe der starken Sprache kompensieren: z. B. Soll ich hit it? Kannst du move a bit?⁵¹

Über eine besondere Bedeutung verfügt die Quantität des Inputs, sowie die Tatsache, welche Sprache von der Umwelt gesprochen wird. Als Folge dieser Tatsachen entsteht die Kompetenz (Sprachkenntnis) und die Performanz (Sprachgebrauch) in beiden Sprachen, sowie die bevorzugte Sprache.⁵² Die Sprache, die sich langsamer entwickelt, kann von den erreichten Kenntnissen in der anderen Sprache profitieren, ansonsten verwenden monolinguale Kinder gewisse sprachliche Strukturen nicht eher, bis die entsprechenden

lexikalen und syntaktischen Informationen zur Verfügung stehen. Die beiden Sprachen beeinflussen einander gegenseitig, sogar die schwache die starke Sprache.⁵³ Cantones⁵⁴ Erhebung beweist, dass die Vermischung beider Sprachen aus dem operationalen Fehler des „Select“ wegen der Ungeübtheit der Kinder stammt: Sie wählen im Spracherwerbsprozess aus der falschen Sprache. Die Tatsache, dass die Sprachmischung ein Performanzfehler ist, wird auch dadurch bewiesen, dass er individuell ist, also abhängig von einzelnen Kindern.⁵⁵

Nach einer Übersicht über den Spracherwerbsprozess der simultan Zweisprachigen, geben wir nun einen kurzen Überblick über zweisprachige Kinder, die die beiden Sprachen sukzessiv, also nacheinander aneigneten, wie z.B. im Falle, wenn die Sprachen der Umwelt und der Familie verschieden sind. Laut Tabors und Snow⁵⁶ verläuft der Spracherwerbsprozess in dieser Situation anders, und es werden 4 Phasen erwähnt:

1. In der ersten Phase benutzt das Kind die Muttersprache auch dann, wenn seine Umgebung eine andere Sprache verwendet. Auf die Auswirkungen seiner Umwelt – auf die unverständlichen sprachlichen Reize – kann das Kind auf zweier Art und Weise reagieren: Es spricht nicht mehr, oder setzt die Konversation in seiner eigenen Sprache fort. Alle beide Situationen sind für es frustrierend.

2. Die zweite Phase ist die nonverbale Phase. Das Kind hört zu, und versucht mit den Erwachsenen mit nonverbalen Zeichen zu kommunizieren. Im Laufe der Zeit beginnt aber das Entdecken der Zweitsprache und die Übung der neuen Laute, auch wenn erst nur leise.

3. In der dritten Phase ist das Kind bereit die Sprache in seiner Umgebung zu gebrauchen. Sein Gespräch ist telegraphisch, ohne grammatische Merkmale, aber inhaltsbezogen. Typisch für diese Phase ist das Verwenden von Formeln. Also die von den Erwachsenen gehörten Phrasen, routinmäßige Wortverbindungen, deren Inhalt es in der Wirklichkeit gar nicht versteht, werden automatisch wiederholt.

4. Die vierte Phase ist die produktive Phase. Die Kinder können eigenkonstruierte Aussagen entwickeln, die Phrasen mit den neuerlernten Wörtern verbinden, die grammatischen Regeln der Zweitsprache verstehen und verwenden.⁵⁷

Zweisprachigkeit: Vor- und Nachteile

Im Bezug auf die Kenntnisse zweier Sprachen unterscheiden wir die Performanz, die die Möglichkeit einer erfolgreichen Kommunikation sichert, und die in der guten Aussprache, in der Kenntnis vom Grundwortschatz, sowie im Gebrauch von den wichtigsten grammatischen Regeln erscheint. Die kognitive sprachliche Kompetenz benutzt jedoch das Sprechen als Mittel des Denkens, was wiederum eine Bedingung des Sprachgebrauchs von hohem Niveau ist, eine Bedingung dessen, dass wir mit Hilfe der Sprache ernsthafte kognitive Denkopoperationen wie z.B. Abstraktion, Verallgemeinerung ausführen können. Die Performanz lässt sich sowohl in der ersten als auch in der zweiten Sprache leicht entwickeln, doch die Entwicklung der kognitiven Kompetenz hängt auch von der allgemeinen Intelligenz ab: Kann sie nicht entwickelt werden, bleiben die

Ergebnisse des Sprechers (des Kindes) unter seinen.⁵⁸

Die Forschungen über die Zweisprachigkeit fokussieren sich am Anfang auf die Vor- und Nachteile, die auf eine Person ausgeübt werden. Zweisprachig zu sein (Ausnahme die elite Zweisprachigkeit) wird am Anfang des 20. Jahrhunderts als Nachteil aufgefasst. An dieser Auffassung ändern die ersten Forschungen, die die Professionalität der früheren Erhebungen bezweifeln.⁵⁹ Auch heute zählt das Thema, mit welchen Vor- und Nachteilen die Zweisprachigkeit verknüpft werden kann, zu den wichtigsten Bereichen der Zweisprachigkeitsforschung, doch heben die heutigen Untersuchungen eher ihre Vorteile hervor.

Im Bereich der exekutiven Funktion führt Bialystock⁶⁰ Experimente mit zweisprachigen Personen durch. Die exekutive Funktion ist ein kognitiver Prozess. Sie ist für die Lenkung, für die Koordination und für die Hemmung verantwortlich. Trotz der Reize, die die Aufmerksamkeit ablenken, ist sie für das Aufrechterhalten des Tätigkeitsziels unentbehrlich. Eine typische Aufgabe ist das Sortieren von Karten (DCCS), wobei diese Aufgabe von den zweisprachigen Probanden besser absolviert wird als von den einsprachigen. Bialystocks⁶¹ spätere Erhebung – ebenfalls mit Hilfe von Karten, aber ergänzt mit semantischen Aufgaben – beweist, dass während die zweisprachigen Personen besser klassifizieren können, haben sie mit den abstrakten semantischen Merkmalen mehr Schwierigkeiten als die einsprachigen Probanden. Beim Test „Simon says“, durchgeführt von Bialystock und seinen Kollegen,⁶² wird eine bessere Reaktionszeit entdeckt, sowie arbeiten die zweisprachigen Probanden mit einem geringeren Fehlerquotient als die einsprachigen Teilnehmer. Es wird angenommen, dass die zweisprachigen Teilnehmer bei der Verwirklichung der Aufgaben eine besser entwickelte Hemmung haben.

In ihrer Erhebung von 2005 zeigen Bialystok und sein Team,⁶³ dass die Aufmerksamkeitskontrolle der zweisprachigen Testpersonen besser ist als der der einsprachigen. In ihren Aufgaben befindet sich eine falsche Information, die zu falschen Alternativen führen kann, und in deren Erkennung heben sich die zweisprachigen Probanden besonders hervor. Auch in der Lösung der nonverbalen Aufgaben besitzen sie einen besseren Kontrollmechanismus. Nach den Vermutungen vom Team kommt das von der Kenntnis und vom Gebrauch zweier Sprachen, das ein Leben lang auf ihr kognitives System eine Wirkung ausübt und es modifiziert. Die erfolgreiche Kontrolle der Aufmerksamkeit und der „code-switching“ wirkt und entwickelt die allgemeinen Kontroll- und Hemmfähigkeiten.

Zweisprachige Kinder müssen zwischen zwei Bezeichnungen für einen Gegenstand viel früher wählen, um eine erfolgreiche Kommunikation durchführen zu können,⁶⁴ aus diesem Grunde erfahren sie früher, dass zwischen den sprachlichen Formen und Bedeutungen nur ein arbiträrer Kontakt besteht.

Die Vorteile der Zweisprachigkeit zeigen über die Kenntnis zweier Sprachen weit hinaus, und beinhalten kognitive und soziale Vorteile,⁶⁵ aber sie erscheinen auch in den besseren Fähigkeiten der Problemlösung und der Begriffsbildung, im weiteren in der Empfänglichkeit für abstrakte Systeme, in der besseren sprachlichen und kognitiven Kreativität, in der sozialen Empathie und in der Offenheit gegenüber Sprachen und Kulturen.⁶⁶

Die kommunikativen Aspekte des Spracherwerbs, inbegriffen die Aneignung des mentalen Lexikons⁶⁷ oder die verbalen Fertigkeiten entwickeln sich bei zweisprachigen

Personen vorteilhafter.⁶⁸

Es muss aber auf einen Unterschied zwischen zweisprachig und zweisprachig hingewiesen werden, denn die vielen Vorteile beziehen sich auf die, die alle zwei Sprachen auf einem hohen Niveau gebrauchen können.⁶⁹

Fazit

Heute wird das Phänomen Zweisprachigkeit als zunehmend positiv betrachtet. Friderici⁷⁰ und weitere Forscher schlagen sogar die zweisprachige Erziehung der Kinder vor. Auch aus diesem Grunde ist es wichtig, dieses Phänomen mit seinen Gegensätzlichkeiten besser kennenzulernen, auch im Sinne, diese Kenntnisse im Fremd(Zweit)sprachenunterricht zu benutzen. Viele Erkenntnisse über das implizite Lernen, über schon vorhandene natürliche Methoden können in Kindergärten und Schulen erfolgreich für die effektivere Aneignung der (nicht nur Sprach-) Kenntnisse der Kinder eingesetzt werden.

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A GYERMEKI KÉTNYELVŰSÉG PSZICHOLINGVISZTIKAI ASPEKTUSAI
Klein Ágnes

Absztrakt

A kétnyelvűség fenomenója sokoldalú megközelítést tesz lehetővé. Jelen munkában mindenek előtt a pszicholingvisztika oldaláról közelítünk a témához a következő csomópontok alapján: utak, módok a kétnyelvűség kialakulásához, a nyelvek elhelyezkedése, tárolása az agyban, valamint a kétnyelvűség előnyei és hátrányai.

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DAS ERBE DER DEUTSCHEN UND UNGARISCHEN KÖRPERERZIEHUNG

RÓZSA KURUCZ

Abstract

The 19th century process of the development of physical education in institutions in Hungary is discussed in our essay. We are following how the foreign theoreticians': Johann Heinrich Pestalozzi, Christian Gotthilf Salzmann, Johann Christoph Friedrich Guts-Muths, Friedrich Ludwig Jahn - the wellknown philanthropists' - views and practical experiences influenced the Hungarian physical education.

We are proving by primary sources, by documents having been unexplored up till now, the importance of associations, pedagogues, the training institution playing a significant role in establishing the Hungarian physical education contently, pedagogically and organically. According to our research, the teachers of the first Hungarian kindergarten teachers' training instituton recegnized first in Europe that physical education is the basic, important and essential constituent of forming personality in kindergartens, and a worked out pedagogical programme is needed to direct it. We are exploring that the first Hungarian material dealing with the infants' physical education and the practice of physical education established in institutions are unique in Europe.

Our reserarch exploring the method the measure system of the Hungarian physical education and the efforts to expand it intititionally in the whole country provides anopportunityfor the European researchers to make a comparative analysis.

The iconographic research done in order to analyse the physical training and gymnastic instruments turned (Test-gyakorló-³s erősítő Gépelyek) up during the research got an important role in analysis.

Die Einführung der institutionellen Körpererziehung

Die Notwendigkeit der zielbewussten Entwicklung des Körpers hatte das ungarische Volk schon früh erkannt, es mussten doch Jahrhunderte vergehen, bis das Ritter-Turnier durch die modern aufgefasste Körpererziehung aufgelöst wurde. Der historische Weg der Ausgestaltung der ungarischen institutionellen Körpererziehung im neunzehnten Jahrhundert verbindet sich eng mit den europäischen humanistischen und philanthropischen Ansichten.

Als erste wünschte die Königin Maria-Theresia (1717-1780) die Grundsätze der ungarischen Erziehung in eine Verordnung zu fassen und die nach ihrem Auftrag konzipierte Arbeit-Ratio Educationis 1777¹ – ist zugleich die erste offizielle Urkunde

der Körpererziehung im Kindesalter. Diese Verordnung öffnet theoretisch die Tore der ungarischen Schulen vor der bis dahin verbannten Körpererziehung. Das Programm der Körpererziehung im „Ratio“ ging seiner Zeit voran, die meisten europäischen Länder erließen ja erst nach achtzehnhundert ihre Regelungen der Körpererziehung. (Dänemark im Jahre:1828, Preussen im Jahre:1852).

Der Ratio Educationis ist eine die Körpererziehung betreffende Maßnahme von großer Auswirkung, deren praktische Verwirklichung-infolge der Organisation der damaligen Schulen und des Mangels an Lehrern- am Ende des achtzehnten Jahrhunderts weggeblieben ist. Die praktische Verwirklichung, die Einführung der institutionellen Körpererziehung beginnt erst im ruhmvollen Zeitalter der ungarischen Geschichte, in der Reformzeit (1825-1848).

Auf die Tätigkeit der Philanthropen wurden auch die ungarischen Reformpolitiker aufmerksam und sie bewerteten all das, was die auf dem Gebiet der Körperkultur erreichten, als eine Tat von großer Bedeutung.

Die unterdrückten, in ihrer Selbständigkeit gefährdeten Völker suchten nach gemeinschaftsbildenden, auch physikalische Fähigkeiten entwickelnden Schauplätzen, wo man eine starke, gehärtete, disziplinierte, ihre Heimat liebende Jugend erziehen konnte.

Zweifellos war Anfang des neunzehnten Jahrhunderts in Europa- vor allem in Deutschland- das Volkssport sehr beliebt und populär. Wir sollten hier nur an den Turnplatz von Jahn in Hasenheiden oder die Gymnastik fundierenden Körperübungen von Guts- Muths (1759-1839) denken. Vor 200 Jahren – im Juni 1811 – errichtete Friedrich Ludwig Jahn (1778-1852) in der Berliner Hasenheide den ersten öffentlichen Turnplatz mit verschiedenen Turngeräten und Gerüsten. Dort trafen sich Nachmittags Schüler aus Gymnasien und später auch erwachsene Männer zur körperlichen Ertüchtigung. (Siehe Abb. 1)

Die Arbeiten von Guts-Muths und Jahn: die Turngeräte und die Übungen und die Beschreibungen derer Führung waren schon Facharbeiten von großer Wirkung auf ganz Europa. (Siehe Abb. 2)

Bis dahin war es aber unaufgedeckt, wer die institutionelle Einführung der Körpererziehung im Kleinkindalter als erster in Europa verwirklicht hatte?

Für die Einführung des Turnunterrichts in den Schulen sowie die Ausbildung der Turnlehrer hatte Adolf Spieß (1810-1858) Darmstadt erst 1849 Auftrag bekommen.²

Auf dem Hofe des Bildungsinstitutes für Kindergärtner zu Kaiserswerth (Deutschland, 1836) ist nur ein Turngerät - eine schottische Schaukel - zu sehen.³

In der Kleinkinderschule von Wilderspin wurden keine Turngeräte eingeführt, er erwähnt nur die Schaukel. In dem Gerätearsenal der früh errichteten ungarischen Kindergärten von Terézia Brunszvik (1775-1861) kommt auch nur die Kinderschaukel als Bestandsstück vor.⁴

Die während unserer Forschung erschlossenen Dokumente lassen uns darauf folgern, dass der planmäßige Einbau der Körpererziehung im Kleinkindesalter ins pädagogische

Programm des Bildungsinstituts zuerst von dem Direktor des ersten ungarischen Instituts für Kindergärtnerbildung István Wargha (1808-1876) erarbeitet worden ist.

Der Einbau einer gesunden Lebensführungskultur in die pädagogische Arbeit eines Instituts bedeutete eine aussordentliche Veränderung, Entwicklung am Anfang des neunzehnten Jahrhunderts, es gab nämlich- einige Turnplätze, Turnübungsschulen abgerechnet im damaligen Europa in keine anderen Form. (In Dessau: Johann Bernhard Basedow, in Schnepfenthal: Christian Gotthilf Salzmann, dann Johann Christoph Friedrich Guts-Muths, in Yverdon: Johann Heinrich Pestalozzi, in Hasenheiden: Friedrich Ludwig Jahn, in Schweden: Per Henrik Ling, in Pest: Baron M. Vay, Vilmos Egger, später Ignac Clair).

Die Pester Turnübungsschule war ohne Zweifel die erste Anstalt in Ungarn (1817, dann 1833) aber als Privatinstitut bat nur den Kindern vornehmer Eltern Möglichkeiten für die Körperübung.

Das erste Programm der Körpererziehung

Nach dem Entschluss der Leitung der Organisation *Kisdedóvó Intézeteket Magyarországon Terjesztő Egyesület* (ungefähr: *Verein für die Verbreitung von Kindergärten in Ungarn*) wurde im Jahre 1837 im Institut für Kindergärtnerbildung in Tolna die regelmässige Körperübung das erste Mal in Ungarn eingeführt.

Die Mitgliedschaft des Vereins- unter dessen Gründungsmitgliedern auch die Reformpolitiker vertreten waren, wie z.B. Miklós Wesselényi (1796-1850), Lajos Kossuth (1802-1894), Christian Fuchs empfahl die Körperübung, das Programm der Erziehung für gesunde Lebensweise sowohl in die Bildungsfächer, wie auch in das Tagesprogramm des Übungskindergartens aufzunehmen.⁵

Die in dem Bildungsinstitut eingeführte Körperübung gab der Erziehung im Kleinkindesalter ein Modell dafür, wie die Körperübung unter institutionellen Rahmen verwirklicht werden kann. Und als Fach am Bildungsinstitut bereitete es die Studenten auf den Unterricht der Körperübung vor.

Diese ins Tagesprogramm der Erziehungstätigkeit aufgenommene Körperübung erforderte von der Leitung des Instituts die Ausarbeitung ein neugedachtes Organisations- und Mittelsystem.

István Wargha Direktor des Bildungsinstituts hielt der Hörerschaft theoretische Vorlesungen und erörterte das Programm der Gesundheitserziehung und der gymnastischen Erziehung, die die Studenten in ihren Aufsätzen bearbeiteten.⁶

„19 §. Gymnastik: Die Ganze Erziehung ist nichts als Gymnastik der Seele, der Geistes und der Körpers. Körperliche Erziehung ist Hauptbestreben der Bewahr-Anstalten, nemlich einer gesunde Seele, gesunden Verstand im gesunden Körper zu entwickeln und zu bilden. Überdem, daß die Kinder täglich rein gewaschen in reiner Luft gehalten, alles was sie sehen und berühren rein und ordentlich ist, müssen sie in der Bewahr-Anstalt eine zweckmäßige

Gymnastik haben. Nichts trägt so sehr zur Erhaltung, zur Entwicklung Wachstume und Stärkung des Kindlichen Körpers bei als Bewegung; Besonders wenn der Genuß der freien Luft damit verknüpft ist. Zugleich wird sie als ein trefflicher Heilmittel zur Schwächung verschiedener Krankhaften Dispositionen und zur Entfernung schon vorhandener Übel anempfohlen...Die Beweglichkeit, welche die Natur diesem Alter verliehen hat ist ein Wink dazu. Darum läßt man die Kinder frei herumgehen, laufen, springen, tanzen, spielen...

20§. Spiele: Der Körperbildenden Spiele fallen mit der gymnastischen Übungen, welche im diesem Alter Zulässig sind, beinahe zusammen. Spiele sind diesem Alter so angemessen, und ergeißlich, wie Lernen dem späterem, und es giebt keine Hauptkraft im Menschen zu deren Entwicklung sie nicht wesentlich beitragen könnten.²⁷

Dieses erste „pädagogische Programm“ legte die Grundsätze der Körpererziehung im Kleinkindesalter. Auch in Europa führend gab es ein Tagesprogramm in die Hände der Erzieher, das durch den Einbau gymnastischer Übungen die gesunde Lebensweise der Kleinkinder garantieren konnte.

Unter den Erziehungsaufgaben war die somatische Erziehung von hervorgehobener Wichtigkeit und dies wurde so begründet. „Die Unversehrtheit und Stärke des Körpers soll erste Sorge der Erziehung sein.“²⁸

Im Interesse dessen wurde auch alles getan, wurden die zur gesunden Lebensweise notwendigen Bedingungen geschaffen. Ein Drittel des geräumigen Hofes diente der Körperübung. In der Ausgestaltung des Turnplatzes schuf das Bildungsinstitut für Kleinkindererzieher ein beispielhaftes Eigenartiges.⁹

Der Einbau der Entwicklung der somatischen Kräfte in das flexible Tagesprogramm der Kleinkinder und die Verwirklichung davon, dass auch die Gymnastik in das Lehrmaterialsysteem eingeschaltet den Studenten beigebracht wurde, war in seinem Zeitalter alleinstehend in Europa. Im Tagesprogramm des Kindergartens wurden für zwei Gelegenheiten Körperübungen geplant, morgens und nachmittags. Zum Beispiel wurde im Sommer früh, zwischen 7-8, 30 Uhr, dann am Nachmittag von 16 bis 17 Uhr geübt.

Ausserdem sollten zwischen den Fachstunden Bewegungsübungen gehalten werden. Das „Lebenselement“ der frischen Luft wurde den Kleinen nicht entzogen, man blieb häufig im Freien und war der Meinung „es soll nur die Dürsterkeit des Wetters die winzigen Kinder in den Raum drängen.“²¹⁰

Das Bildungsinstitut schuf also eine völlig neue Bildungsform und die Grundlagen der Tagsordnung im Übungskindergarten. Es wurden die Pädagogik von Salzmann die gymnastischen Übungen und Geräte von Guts-Muths für nachahmenswert gehalten, sie wurden bei uns eingebürgert- mit Berücksichtigung der ungarischen Eigenarten.

Der Umfang dieser Studie macht es nicht möglich, wesentliche Grundsätze, Aufgaben der Körpererziehung und ihre in der Praxis verwirklichten Methoden, Geräte ausführlich zu beschreiben, die in der *Kindergärtnerwissenschaft (Kisededóví Tudomány)* innerhalb der Erziehungswissenschaft von den Gründen niedergelegt wurden.

Diesen zeitgenössischen Dokumenten nach kann es eindeutig summiert werden, dass die Verfasser dieses in seiner Zeit mit echt wissenschaftlichem Anspruch

zusammengestellten pädagogischen Programm, die mit der Entwicklung der Kleinkinder zusammenhängenden Eigenarten, die Notwendigkeit der Verstärkung der somatischen Fähigkeiten und den grundsätzlichen Anspruch des Kindes für das Handeln gut kannten.

*„Wachsamkeit und unablässiges Handeln werden mit dem unversehrten Kinderleib mitgeboren. Wie ein Vogel mit geschnittenen Flügeln läuft und hüpfet es Unbesäuftigt herum... Zur Pflege dieses eifrigen Handelns sollen alle zweckmässigen Geräte gebraucht, soll alles begangen werden.“*¹¹

In Kenntnis der Pädagogik der im Ausland schon tätigen philanthropischen Institute wurde die erste ungarische „*Kindergärtnerwissenschaft*“ geboren, und das theoretische Material der Kindererziehung- insbesondere mit Bezug auf die Körpererziehung – trennte sich nie von der Praxis los.

Der Turnhof mit verschiedenen Turngeräten in Tolna

Nach dem Entwurf aus dem Jahre 1838 wurden auf dem Turnhof des Bildungsinstituts für Erzieher gymnastische Geräte aufgestellt. Dieses dokumentarische Material ist als Manuskript erhalten, so haben wir die Möglichkeit Vergleiche zu ziehen und Analyse zu machen.

Zu der Grundidee der Geräte, der „*Maschinen*“ dienten die Übungsgeräte von den deutschen Experten Guts-Muths und Jahn als Modell, die sie nach Einfällen, entnommen der antiken griechischen Gymnastik, verfertigten.

Bei der ikonographischen Forschung konnten Vergleiche nach den Zeichnungen über die Turngeräte der Bücher von Guts-Muths sowie nach dem Bild über den Turnplatz Jahns, Berlin, 1811 gezogen werden.^{12, 13}

Die Übernahme der Grundideen ist unbestritten. Auch die fachgemässe Richtung zu den Lebenseigenarten des Kindesalters ist in manchen Fällen festzustellen, es gab aber auch Geräte, die nicht für das Lebensalter des Kindes bestimmt waren. (z.B. das Hängeseil und zugleich Leiter, 20 Fuss – 6 m – hoch war es) (Siehe Abb. 3).

Die Anpassung an die ungarischen Eigenarten wird durch die von ungarischen Fachleuten verfertigten Turngeräte bewiesen. Es gibt manche eigentümliche, während der bisherigen Forschung in deutschen Fachbüchern nicht veröffentlichte Geräte, die Entwürfe ungarischer Fachleute sind. (z.B. hinaufführender Balken) (Siehe Abb. 4).

Eine beachtenswerte Umgestaltung an den Hüpfgeräten ist zu beobachten, der zur Ausführung der Springübungen der Kinder modifiziert wurde.

In der Zeit der Gründung halfen folgende Geräte bei der körperlichen Erziehung der Kinder: Schaukel, Vierer-Karussell, Holzbein /Storchbein/, Springmittel, Klettersäule, zur Balancierung auf Kante gestelltes Brett, sich in der Luft bewegender Balken, Seilleiter, Kletterholz, schräger Balken, Brettergestell mit Stiege, Teufelpferd /Pferd/, Übungsschranke.¹⁴ (Siehe Abb. 3., 4., 5., 6., 7.)¹⁵

Obige Geräte halfen bei folgenden motorischen Entwicklungsprozessen: Gehen, Klettern, Kriechen, balancierendes Gehen und balancierende Haltung, Springen, Überschreitung eines Hindernisses, Schwingen, Hängen, Schlüpfen, Anklammern. (Ihre Entwicklung gehört auch heute noch zu den Erfordernissen der körperlichen Erziehung). Die Mittel sichern die Entwicklung und die Selbsttätigkeit. Friedrich Fröbel in Deutschland versuchte mit seinen tätigkeitsfördernden Spielmitteln dieses Ziel zu erreichen, doch die Beschäftigung wurde zu einem starren System, und führte so zu keinem Ergebnis.¹⁶

Der in dem ersten Institut errichteten ungarischen Turnplatz hatte eine Auswirkung auf das ganze Land. Es hatten vor allem die ihre Studien hier absolvierten Erzieher körperübende Schauplätze in dem eigenen Kindergarten eingerichtet, so hatten zum Beispiel Tolna, Zsibó, Világosvár, Kassa, Miskolc usw. gut ausgerüstete, über körperübende Geräte verfügende Institute.

Die Geräte wurden ergänzt, erweitert. Die „*Kindergärtnerwissenschaft*“ aus Zsibó veröffentlichte sogar die Entwürfe unterstehender Geräte: Anhängestangen, schwebende Stränge, Kreuzanhänge, Armzweig.

Die auf die Wirkung des Instituts in Gang gekommene gymnastische Erziehung hatte sich entwickelt. Es wurden neben den Kindergärten Turnplätze auch in den Gymnasien errichtet, wo man die körperliche Erziehung fortwährend gestalten konnte. Als erste folgten zwei Miskolcer protestantischer Gymnasien der neuen Idee¹⁷ den Weg freigemacht für die Kette der Ansätze, die auf die schulische Körpererziehung in dem Reformzeitalter drängten.

Notizen:

- 1 Ratio Educationis totiusque rei literariae per regnum Hungariae et provincias eidem adnexas 1777. Vindobonae. A nevelésnek és az egész közoktatásügynek rendje Magyarországon és kaptcsolt tartományában. Ford.: dr. Friml Aladár, Ratio Educationis, Budapest. 1913.
- 2 Bohn Ferenc: A testnevelés története. (The History of Physical Education), Budapest, 1942. 203. p.
- 3 Robert Alt: Bilderatlas zur Schul- und Erziehungsgeschichte. II. Berlin, 1965.
- 4 Zibolen Endre: Brunsvik Teréz óvodáinak belső életéről = Ma és holnap, 1975. 1. sz.
- 5 Országos Levéltár. (OL) P. 1652. 3. oszt. 4. cs. 4. tétel. A tolnai képző- és példányintézet naplója. (1837-1843). (National Archives (NA) P.1652. class 3. packet 4. item 4. The journal of Tolna training college and model infant school. 1837-1843)
- 6 Országos Levéltár. (OL) P. 1652. 3. oszt. 4. cs. 4 tétel, 1840. (NA P 1652. class 3. packet 4. item 4.)
- 7 Kurucz Rózsa: Az első magyar óvóképző. 1837-1843. Babits Kiadó, Szekszárd, 2002. 198-199. p.

- 8 Wargha István: Mi kell a magyarnak? Kassa, 1834. 43. p. (What need Hungarian people?)
- 9 Végh József: A budapesti m. kir. állami óvónőképző intézet százéves története. Pécs, 17. p. (Hundred Years of History of the Hungarian Royal State Training College for Infant School Teachers in Budapest.) University Press, Pécs 17. p.
- 10 A zsidói „Kisdedővői Tudomány” részletes kivonata. Kézirat, Zsidó, III. 1842. 9. p. (Knowledge about Infant Education a manuscript in Zsidó. No. III.).
- 11 A zsidói „Kisdedővői Tudomány” i.m. III. 45. p.
- 12 Guts-Muths: Gymnastik für die Jugend, Wien, 1805.
- 13 Guts-Muths: Turnbuch für die Söhne des Vaterlandes, 1817.
- 14 OL P 1652. 3. oszt. 4. cs. 4. tétel. A tolnai képző és példányintézet naplója 1838., 6. p. (NA P 1652. class. 3, packet 4. item 4. The journal of Tolna Training College and Model Infant School)
- 15 A zsidói „Kisdedővői Tudomány” Gimnasztikai eszközök. 1842. (Gymnastic apparatus in infant schools)
- 16 Dr. Bús Imre: Játékelméletek. Szekszárd, 2002. 57-58 p.
- 17 Tóth István: Az országos kisdedóvás mai állapota-Ötödik közlemény-Pest, Vodiáner, 1864.

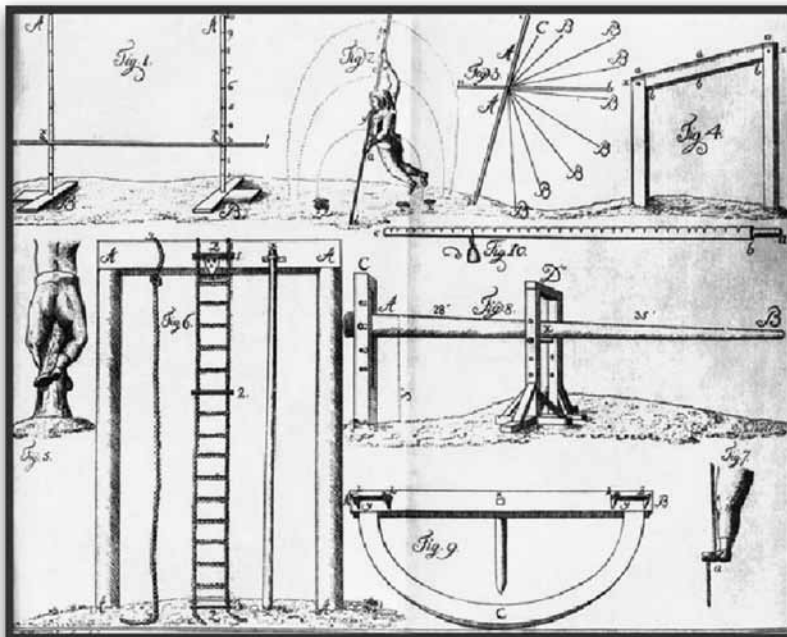
Publisher's Reader: **Dr. Imre Bús PhD**
college professor

ANLAGEN:

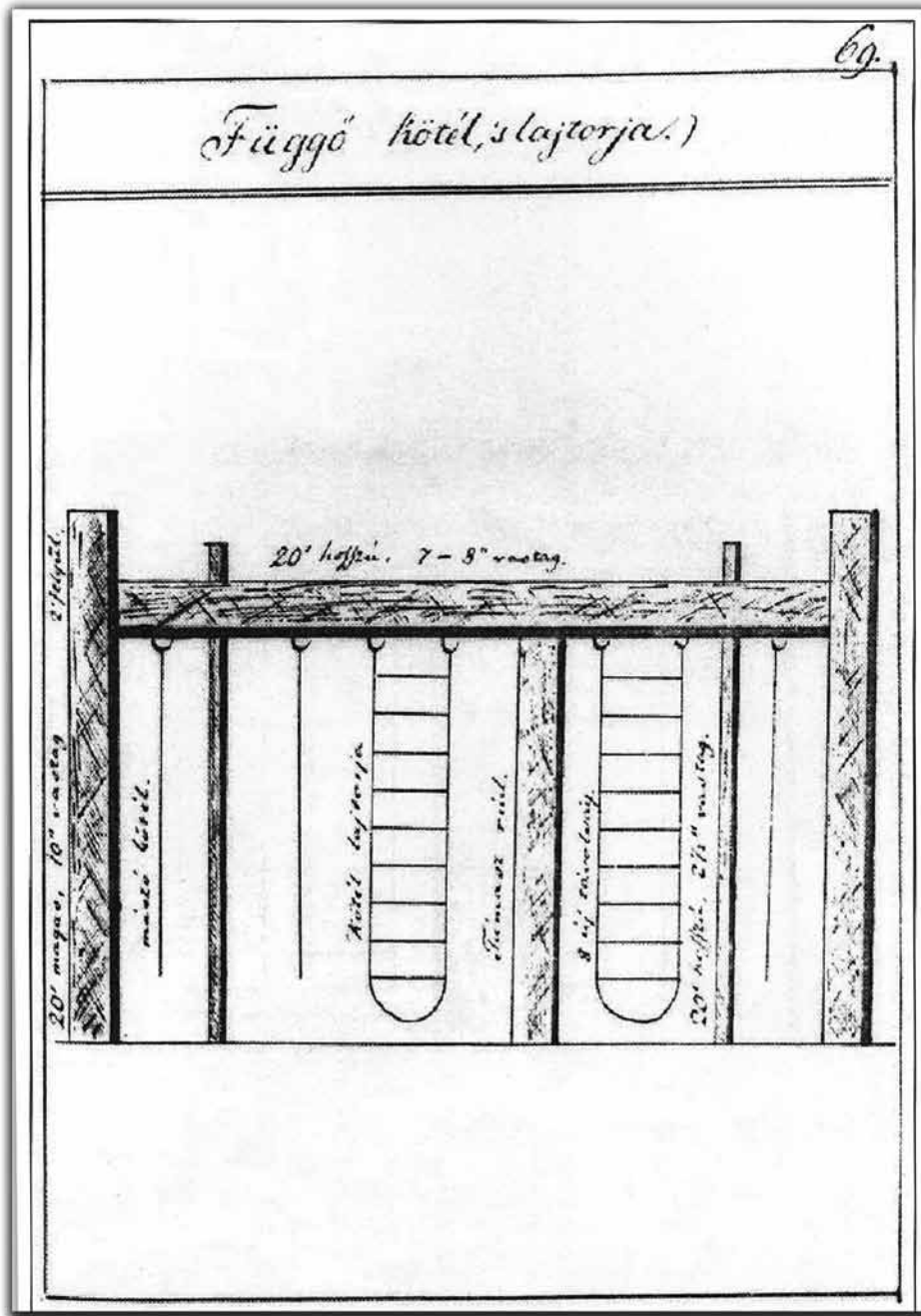


Das Motiv der 165-Cent-Briefmarke zeigt eine Lithographie des ersten Turnplatzes Deutschlands (1811). (Siehe Abb. 1)

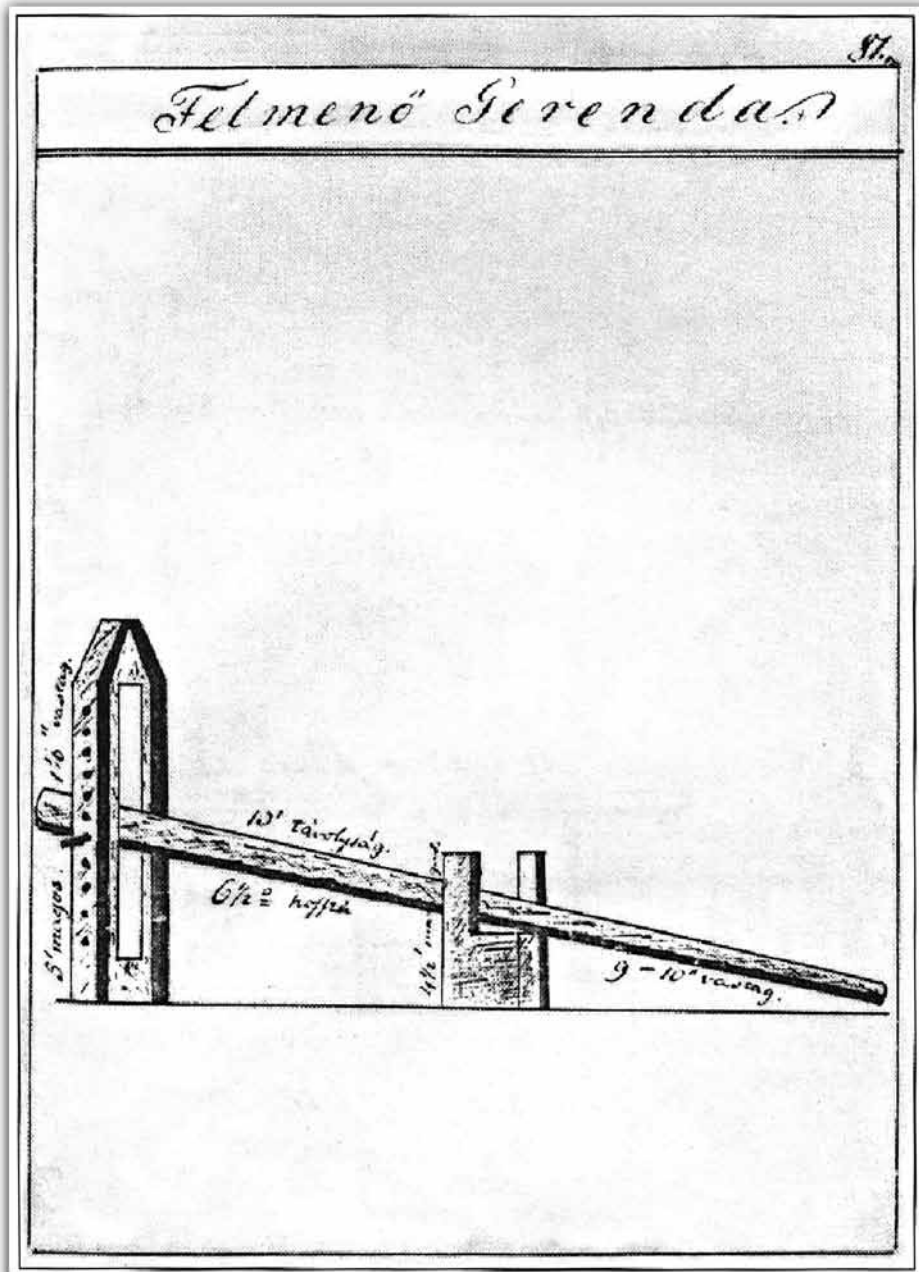
<https://www.efiliale.de/efiliale/katalog/produkt.jsp>



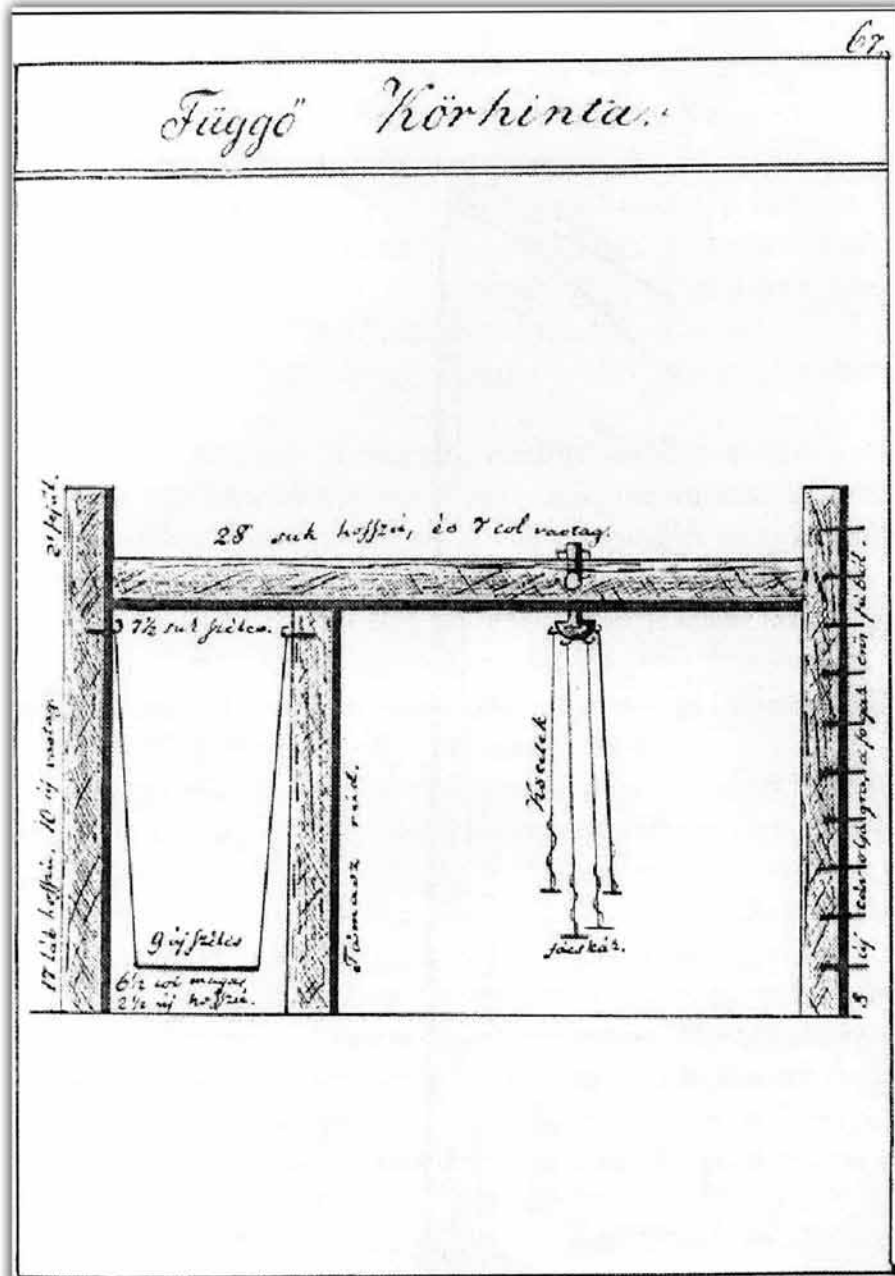
Guts-Muths: Gymnastik für die Jugend, 1793. (Siehe Abb. 2)



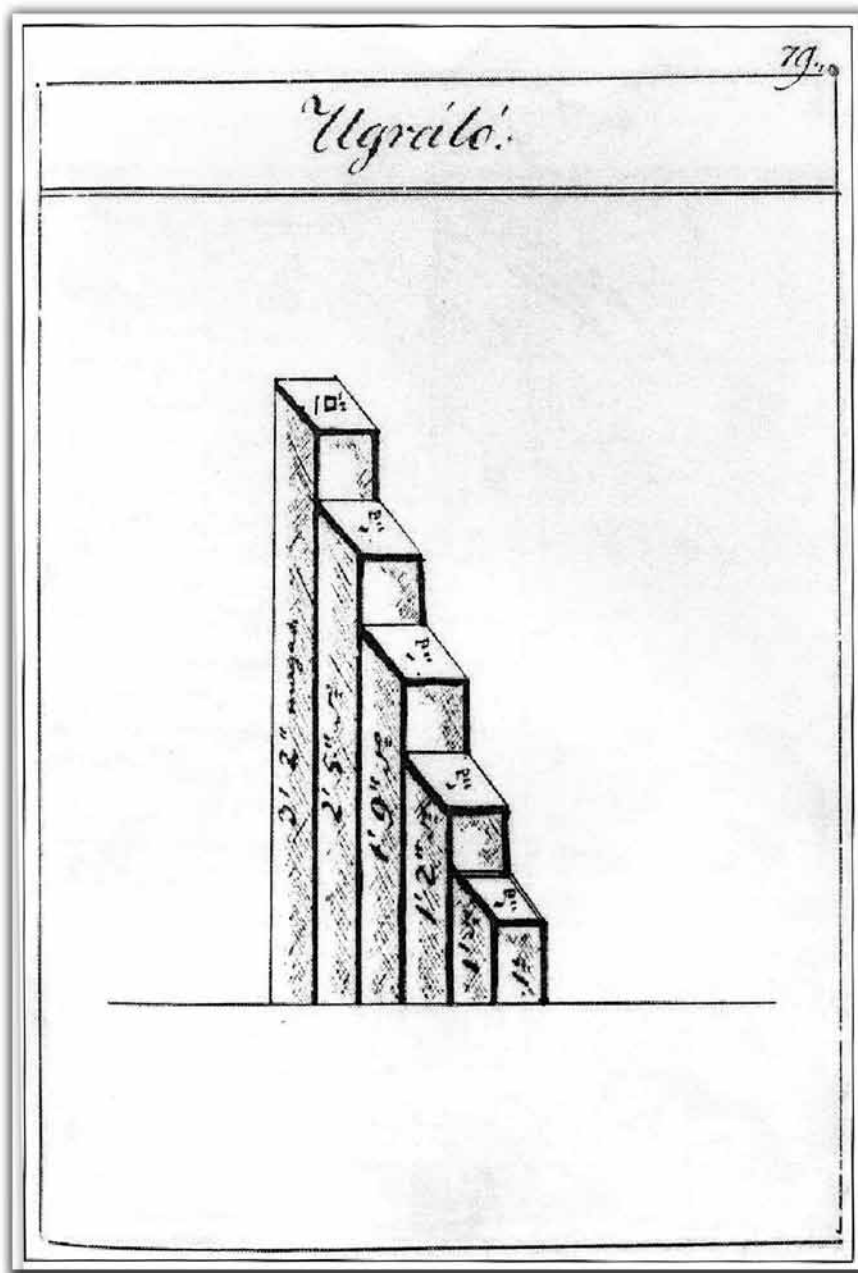
Hängeseil und zugleich Leiter (Siehe Abb. 3)
Kindergärtnerwissenschaft aus Zsibó, 69.p.



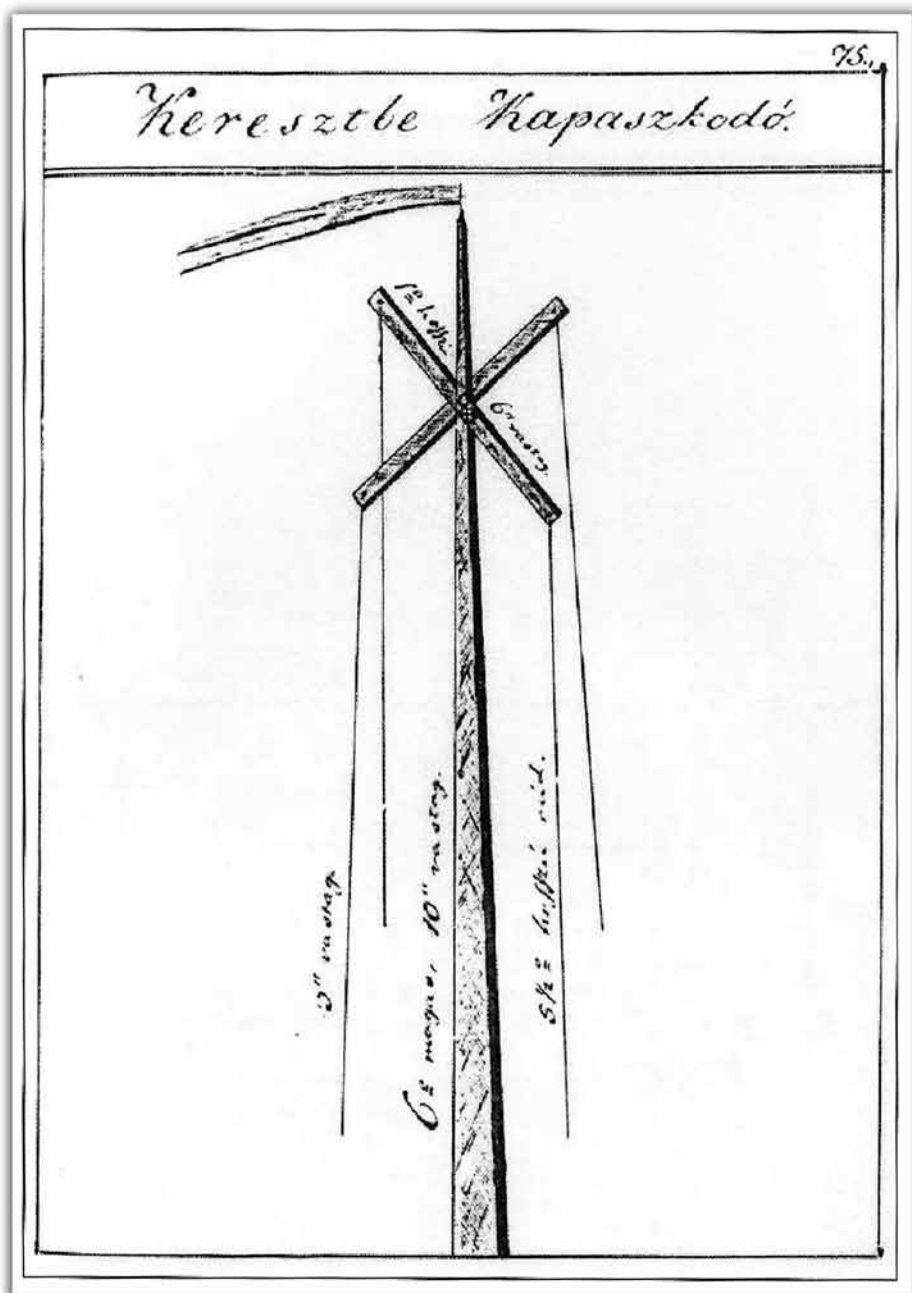
Hinaufführender Balken (Siehe Abb. 4)
Kindergärtnerwissenschaft aus Zsibó, 87.p.



Vierer-Karussell (Siehe: Abb. 5)
Kindergärtnerwissenschaft aus Zsibó, 67. p.



Springmittel (Siehe Abb. 6)
Kindergärtnerwissenschaft aus Zsibó, 79. p.



Kreuzanhänge (Siehe Abb.7)
Kindergärtnerwissenschaft aus Zsibó, 75.p.

A NÉMET ÉS A MAGYAR TESTI NEVELÉS ÖRÖKSÉGE

Kurucz Rózsa

Absztrakt

A 19. századi magyarországi intézményes testi nevelés kialakulásának kezdeteit dolgozzuk fel tanulmányunkban. Nyomon követjük miként hatottak a külföldi teoretikusok: Johann Heinrich Pestalozzi, Christian Gotthilf Salzmann, Johann Christoph Friedrich Guts-Muths, Friedrich Ludwig Jahn, – az ismert filantropisták – nézetei és gyakorlati tapasztalatai a magyar testi nevelés alakulására. Primer források, eddig feltáratlan dokumentumok alapján bizonyítjuk a magyar intézményes testi nevelés pedagógiai, tartalmi és szervezeti megalapozásában döntő szerepet játszó egyesületek, képzőintézetek és pedagógusok jelentőségét. Kutatásunk megvilágítja, hogy Európában elsőként, a magyar óvóképző nevelői ismerték fel, hogy a személyiségfejlesztés alapvető, lényeges és kihagyhatatlan tényezője a testi nevelés, és hogy az irányításhoz, kidolgozott pedagógiai program is szükséges.

Feltárjuk, hogy a kisgyermekkorai testi nevelést tudományosan feldolgozó első magyar pedagógiai szakanyag s a testnevelést az egyes intézményekbe bevezető gyakorlat, egyedülálló Európában.

A magyar testi nevelés módszerét, eszközrendszerét, s az országos intézményes elterjesztés érdekében kifejtett törekvéseket bemutató munkánk, az európai kutatók számára is összehasonlítható elemzésre ad lehetőséget. A torna- és gimnasztikai eszközök (Test-gyakorló- és erősítő Gépelyek) rajzainak elemzése érdekében végzett ikonográfiai kutatás, jelentős szerepet kap a feldolgozás során.

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INTRODUCTION TO THE HISTORY OF ADOPTED PHYSIOLOGICAL EDUCATION

ANIKÓ CHRISTIÁN

Abstract

The history noted more people who dealt with the curative effect of the exercises. The Greek Herodicos is held the father of therapeutic gymnastics. The Roman Galenus Claudius, the famous doctor of the gladiator school, was ahead of his time when he dealt with therapeutic gymnastics and curing massage. The development stopped in the middle ages. Later in the 19th century, big changes happened in this field. The work of doctors and other specialists made it possible that the curing exercises and curing gymnastics could spread in Europe and in Hungary. The Swedish Henrik Ling put the exercises on a scientific basis and harmonised it with the individual's life functions as a directed gymnastics. In Hungary, orthopaedic professors helped and supported the spread of the curing gymnastics. The specialists recognised the usability of school frameworks in the beginning of the 1900s and therefore the education of therapeutic exercises at school started first in the capital city in 1915 and then it functioned as an adopted physical education further. Since 1954, the Hungarian Royal University of Physical Education has started the training of adopted physical education teachers. Since then, this training has been uninterrupted both at teacher field of study and school- and kindergarten educators' professional training. Without intending to be exhaustive, this study wanted to examine the historical development of this special field and also present some important literature.

Introduction

Events, happened hundreds and thousands of years before and which were prepared by our ancestors, have effects only after hundreds and thousands of years because they fuse with the newest results of research and they influence them also.

Experiences and knowledge of humans which are called science of modern time, are huge and a matter of fact, it is nothing else than accelerate development and union of all disciplines which contributes to the quality of lifestyle with safeguarding health and extending human life.

We presume about intelligent man that he knows the history of his own country; otherwise he is not able to understand its traditions, ambitions and aims of his time. The knowledge of history teaches us to evaluate our age accurately. This is also true for the field of adopted physical education and the historical research of it which first appeared as curing exercise and then formed, improved and became part of the physical education in school.

The human body and exercise

Antique philosophers were fine life artists. The aim of their philosophy was the knowledge, also self-knowledge, appropriate act and the search for the good life, which encompassed the human body, too.

Through Platoon, we know that Socrates placed a great emphasis on the education of the body-culture. He trained his body and tried to keep himself in good shape with exercises, dance and simple lifestyle.

According to the famous ancient philosopher, Diogenes Laertus: “The body has a great importance in every human act and during its use, it is important that should be in good condition as much as possible. Everybody knows that even during thinking, the illness of the physic can cause serious failures.”¹

Several ancient philosophers shared Socrates’ opinion about human body. His most famous disciple, Platoon banned the artists but he didn’t expatriate physical education. He dealt with athletes, with their exercises, with gymnastics but he also underlined that the goodness of soul is standing above the physical beauty of the most beautiful young athletes because the beauty of the body comes from there. Aristotle formulates it in this way: “a slave is to his master what a body is to its soul.”

According to Platoon and Aristotle we can say that the ideal of the antique Greek aristocracy was the fit, nicely built man. This beauty, in its reality, manifests in the naked body and harmonious figure while the face, clothes, and other formalities had only subsidiary role.

According to Aristi p.s, “body exercise helps to acquire the morality.” He explains when a man changes his way of thinking and his acts, a healthy body secures more attention and flexibility for that. Zenon also suggested regular physical exercise since he believed that “looking after our health and sensory organs properly is our peremptory duty”.²

Diogenes supported body culture more strongly since he believed it was necessary for reaching wisdom and good life. Diogenes not only advertised the training and disciplining of the body but also experimented with different training forms e.g.: he walked in the snow on bare feet and ate row dishes.

Philosophers from the Far East also realised that training and care of body are a basic tool for philosophical enlightening, like Hatha yoga, Zen meditation, thai chi chuan and other exercises of the ancient Asian systems.

In the European scholasticism, in the Jewish-Christian dominant world, there wasn’t a place for the body, since it was at the bottom of the values and the “custody of the soul”. Physical exercises were presented indirectly, through movements which were connected to physical work. The only exceptions were some special religious orders and military academies. In field of physical training and education, it is worth mentioning the culture of knights in which the heptathlon had a body-culture nature. This middle aged non-fitting paradigm was modified only by the North-Italian renaissance for a short time and then some civil philosophers rehabilitated the body and placed it in a better position on the scale of values.

According to the modern philosophers the essence of the body culture is doing exercises and this is far from the “theories in the ivory tower”. It cannot be denied that philosophical systems which tried to be complete, dealt with the human body with some extent but mostly in a way that they just put it into their concept.

Opinions about human body were enriched by the advocates and theorists of physical education systems in the 18th 19th century, e.g.: Guts-Muths, P.H. Ling and others like the philanthropists Pestalozzi and Basedow.³

According to Ferenc Takács there is a tendency in our days which is growing and getting stronger that it is not important anymore how far a man can throw or jump but how we can get rid of the dangerous body torture coming from our civilization”. The emphasis is on the latter, that is, the future is not the competitive sports for few people but the body culture which is available for everyone. We would need such body education with which our healthy life can be built up, the beauty and strength of our body and the ability to give happiness can be preserved.⁴

Historical aspects of the synthesis of religion and health

The synthesis of religion and health originates from pre-historic times and among nature-close people, the two are still not divided yet. The antique religious curing was covered with myths and the legends were about gods who protected health and had the power to cure. One example to the connection between religion and health and its mode of action is: sleeping in a temple in Greece as part of the curing is nothing else than a meditative stage in a mysterious surrounding. The favourable effect of this was already proved by psychophysical researches. Now, these cults are considered to be the mixture of superstitions and empirical healing but in a way it can be considered as scientific curing. However they point out to the living connection between religion or spirituality and health stand.

According to Pikó B.⁵ the connection between religion and health is one of the most emphasised fields of health sociology nowadays. Famous doctors drew attention to the importance of the exercise of religion in the clinical curing in the beginning of the 20th century. William Osler (1910) says: “religion is like ether, it cannot be grabbed and it becomes reality only through its effects”. The famous doctor when reporting about his experiences, called upon his colleagues to encourage their patients to exercise their religion. He expressed his conviction about the positive role of religion.

Roots of the development of therapy with exercise

Sport historical researches showed unambiguously that body culture as a social procedure

developed from the hunting wild animals in the late prehistoric ages. According to the archaeological, ethnographical and mythological literature it can be stated that the curative power of movement, rubbing and massage were developed by half-nomad, settled, localised people.

While the material of adopted physical education was developed by the spear-throwing, wrestling, fighting against the enemy and hunting, the basic material of remedial physical education is only a result of series of accidents. In this way, massage could evolve from the stroking and hitting of the sprained and strained muscles or the recognition of the hailing effects of the spas could evolve from the good effects of warm treatments in cases of rheumatic pains.

Man could familiarize himself with the operation of the organism of animals already in the ancient times. Plinius, a Roman writer noted that people have learned some “therapy”. To prove this, he mentioned that an old hippopotamus looked for a place where the reeds were broken. It stepped on them in order to stick its feet and get rid of some superfluous blood. This is how the hippopotamus taught men for cutting the veins. It is impossible to find out whether Plinius believed it or not, but his observation and note show the former healing techniques.

The thousands of years old history of cupping can be also mentioned. With this technique, hyperaemia is caused by a special cup and then a small wound was inflicted on the patient and the superfluous blood was drained. This was usually executed by leeches. They thought that they could get rid of harmful fluid by the departing blood and what is more they could expel the demons causing sickness.

Incantations were able to cure a lot in their own, psychological effects. The mystic meditations in the ancient eastern farmer culture brought the breathing practices to us. People who had sedentary life reached the pleasant feeling with certain stretching, arm circling and breathings. Idealistic and irrational ideas also took shape, like who had gallstone had to break stones and who had a bad stomach because of spoiled food had to turn a somersault.⁶

The common root of the therapeutic exercise and the adopted physical education

The therapeutic exercise and adopted physical education have their origin as therapeutic gymnastics in the antique times. The ancient Chinese doctors knew a method with which they were able to restore the curves of the spine. They achieved this mainly with physical exercises united with deep inhalation. Their aim was to strengthen the tired and soft muscles and to do painkilling. In the ancient China, notes cited the book “Kung-Fu” which incorporated the professional description of therapeutic gymnastics, massage with painkilling effects, dancing against sickness, breathing exercises in therapeutic exercise, and basic materials of massage which spread among the folk. It outlined the basic position of the body on drawings, wrote down the elemental forms of massage, and also suggested when smoothing and when rubbing should have been applied.

In the ancient India, gymnastics were applied in cases of all kinds of illness. Natives in India had the most valuable traditions in fields of the development of ritual hygienic motion, dance, self-defence without weapons. Advices to press and rub painful body parts as a therapy indicated advanced massage knowledge. The organic changes because of the breathing regulations during meditations and shaman dances, supplied the basis for the development of the yoga system.

The priests were responsible for curing in the framework of different ceremonies in the ancient Egypt and Greece. In Greece, curing was laid to the hands of secular doctors due to social changes in the 5th Century B.C. They were the first in history who tried to create an independent, secular ethical system from the religious system.⁷

The Greeks held Herodikos to be the father of therapeutic gymnastics and massage. He was a famous gymnast and doctor and he was the first who outlined the bases of the treatment with gymnastics and massage. His successor, Hippocrates (460-375 B.C.) worked it thorough from scientifically point of view again. His doctrines were taken not only by Greek but also Roman doctors too.

Hippocras taught the curative effects of the exercises and the massage because according to him, a doctor who doesn't consider them to be curative cannot make an effective treatment. He counted with the force of the nature and through natural therapeutic treatments he supported this too. His name is connected to the gymnastics bench: "scamnum Hippocrates" which serves the correction of deformed spines. The Greeks knew the breathing gymnastic and exercise with resistance and fast strength practices. The natural therapies played an important role in Asclepiads' treating, therefore he was the first who used the simulative effect of the waves of the water in curing. He seated his patients into a tub hung up in motion.⁸

The Roman's famous doctor, Claudius Galenus (129-199 A.C.) preceding his age, dealt with the therapeutic gymnastics and curative massage thoroughly. Galenus, the doctor of the famous gladiator school in Pergamen, developed the theory of the medical science through anatomical observations, physiological experiments and detailed patient examinations. He was the greatest doctor in the antique ages. He considered the physical exercises, the massage, the bathing, the proper nourishment and suitable lifestyle to be the most effective curing procedure. He continued his practice in Rome from 162 A.C. where, among others, he was Marcus Aurelius' doctor. At the declination of the Roman Empire, medical gymnastics was followed by cruel circus games and elementary athletic exercises.⁹

The Middle Ages had taken the natural therapies away. Curing was in the hands of the church and according to the Christian teaching in order to free the soul, torture of the body was the exemplary road. This era reduced the body culture of that time and therefore the interest towards the therapeutic gymnastics was totally forgotten and it was supported only by the sham doctors. In the middle ages – apart from the knight's castle – there were only a few places where some efforts were made to prepare the young body. It was thought on the basis of the dogma of original sin at schools that the "work of evil", the frivolousness of children, and the badness live in our body.

The therapeutic way of using exercises and the exercises connected to pedagogy came into light again only in the second half of the 14th century. Concerning this, notes can be found in the manuscripts of the Vatican. For example according to Dally, the curative exercises of the antique world were dusted off like the Egyptian and Assyrian ruins were dug out and they were started to be applied again fulfilled with new, fresh spirits.¹⁰

Some centuries later, the French Enlightenment was a milestone in the later development of remedial physical education. Jean Jacques Rousseau's thoughts about education had effects on the theory of modern education. In his book titled "Emil or about the education" he distinguishes between the healthy one and the useless, lame children. He thought that only healthy children can be rewarded with the object of any kind of education.

Johann Heinrich Pestalozzi started his pedagogic carrier by the influence of Rousseau and tried to accomplish the practical problems of the physical education. According to his opinion, children's natural moves and athletic games are only the movement of the joints. Treating this as a starting point it has to be reached step by step what children needs for their bodily development. Free exercises help in the correct posture, the healthy organic function and the acquisition of complex motions.¹¹

It is important to note the philanthropists who played a great role in the realisation of the adopted physical education in school and now we know that this is how they created a basis for the place of adopted physical education. To help the procedure of the achievement of the middle class, the philanthropists had included the education of the body into their programme, which had the aim to teach working. Philanthropy was the pedagogic product of the English, French Enlightenment. They expected from the physical exercises that it should contribute to the fitness of the body and should increase of its strength and capacity. The philanthropists used the result of the medical science of their age. In their point of view the gymnastic practices should be set up on a physiological basis, according to the individual's organisation. They proclaimed that the instructors of gymnastics should not know only the general functions of the human organisation but they should be aware of the effects of every single practice. One of the most distinguished representatives of the philanthropists was Johann Christoph Guts-Muths (1759-1839) who was aware of the „physical atrophy of the poor class" and also recognised that the deficiency of exercises has the consequence that one may deform. According to him, the education of the body can help to form the character as well. Besides, he also recognised the importance of the active relaxation which doesn't mean idleness but it gives refreshment through the work of those body parts which have not been used until then. He was the author of the first comprehensive book about gymnastic in modern ages, in 1793 which had the following title: „Gymnastik für die Jugend"¹²

The Swedish Per Henrik Ling (1766-1839) was the first who worked out the gymnastics which was directed and harmonized with life of the individual and also put the therapeutic gymnastics on scientific basis.

He studied the Scandinavian mythology and the body culture of the seafaring nations. He got to know the Indian and Chinese hygienic gymnastic figures in the Stockholm Museum and he also got the Swedish version of the- already mentioned- Guts-Muths:

„Gymnastik für Jugend” book. He confessed that this work and Pestalozzi’s experiments urged him to systematize the exercises on physiological basis.¹³

Per Henrik Ling got into the Copenhagen University in 1804 where he attended the fencing school diligently. Since the fencing exercises had healed his paralytic right arm, he concluded that the moderate and regular physical exercises have a favourable effect on human body and the spiritual state. First, he acquainted with the Greek gymnastic system and later when he became the university fencing master in Lund, the examination of anatomy, physiology and other auxiliary sciences were the most important for him. In 1813, he founded his first central gymnastic institute in Stockholm and later on in Sweden, sanatoriums formed in the cities and in the small villages as well. Mostly, “holding” elements constituted Ling’s gymnastic and he chose such exercises which physiological effects were demonstrable. He called attention to the fact that it is necessary to execute the exercises slowly, prudently and consciously. His doctrines and methods were developed later by his pupils and in the course of this, the literature of the remedial gymnastic took shape.¹⁴

According to Ling, it is necessary to develop those groups of muscles which insure the correct and beautiful posture and help to function the inner organs. Besides, they made the proportional development of the body, the prevention and overcoming of the harmful effects of work and illness possible.

Ling was the first who put the gymnastic exercises into a system and became the founder of the Swedish gymnastics. In his system, the principles of the functional anatomy were applied. He wished to create four kinds of gymnastics: the pedagogic, the medical, the military and the aesthetic gymnastics but he managed to form only the first two. Ling’s slow, “holding” gymnastics- which was his deficiency- was changed into a dynamic motion system by the Danish physical education specialist, Nils (1880-1950). It is interesting that Ling did not use gymnastic apparatus. The known Swedish pieces of apparatus which are also used today (wall bars, beam, small box, jumper cupboard, gymnastic bench) were constructed and used first by his son, Hjamar Ling (1799-1881) and his pupils.¹⁵

One of Per Henrik Ling’s followers, Dr. Schreiber who was the headmaster of the Leipzig Therapeutics Institute, wrote the following: “Medical gymnastics, in other words the system of sanitary and therapeutic gymnastics. For everyone, without any distinctions to age or sex”. It was translated by Dr. Antal Bodnár in 1888 from which the importance of the exercises and their healing and preventive effects can be discovered. A Hungarian literature, „The school of good posture” follows these principles, and was written by Lajos Miller dancing master in 1890. In his work he tried to find faithful followers for the healthy posture and the healthy lifestyle. A new book came out a bit later which was supported already with scientific arguments. István Héczei’s book from 1896 is „The motion, as the substitute of the most perfect therapy and medicine”. One or two years barely passes when in 1897, a new determining literature is published, namely „The Swedish therapeutic gymnastics” by Dr. István Kelen. We need to emphasize it because this work had a serious effect on the system of the Hungarian physical education and in which the author outlined the already mentioned Henrik Ling’s system thoroughly and exhaustively.¹⁶

The effect of the orthopaedics on the development of therapeutic gymnastics and adopted physical education

In Hungary orthopaedists have recognised first the necessity of therapeutic exercises and therapeutic gymnastics.

The pioneer of the Hungarian orthopaedics and paediatrics was Dr. Ágost Scheopf-Merei (1804-1858)

He studied abroad and after his coming home, he founded the Pest Orthopaedics Institute where he dealt with therapeutic exercises and therapeutic gymnastics too and performed orthopaedics and surgery operations as well.

This was the first institutionalised form of the therapeutic exercise in Hungary. This is where István Széchenyi's sons were healed too and he spoke about the experienced methods with big acknowledgement.¹⁷

The building and the drawings about the furniture, the wall-bars and gymnastic bench remained until today. His institute was washed away by the flood but later, he founded a children's hospital by public contribution to which Lajos Kossuth added the largest sum. Dr János Balassa (1814-1868) wrote about the curing of the tubercular pain in joints in his study in 1852 and he took the position next to the fixing of the joints. Dr. Sámuel Batizfalvi encouraged by János Balassa dealt with orthopaedics and opened a „Body Straitening Institute” in 1859. As the private teacher of the University of Pest, he put the “curing with exercise” into the curative procedures.¹⁸

Dr. Gyula Dollinger (1849-1936) wrote the following: “the aim of the therapeutic exercise is the training of the body and torso of those children who have weak torso and it is susceptible to deform. The emphasis is laid not on the curing but on the training and strengthening. Children with deformed torso belong to the specialist's gym and his treatment.”¹⁹

Appearance of therapeutic exercise and therapeutic gymnastics at schools

It can be concluded that the roots of the adopted physical education lies in the therapy, curing, therapeutic exercises and therapeutic gymnastics. We also know that specialists recognised the usability of it in school in the beginning of the 1900. So, the curing physical education started within school frameworks in our country in 1915 and the prevention and health care was its central tasks.

The views at that time turned out to be modern and pedagogically correct. It called attention to the children whose physical education had to be secured differently than their healthy companions and it had to happen within the schools and not within the hospitals anymore. Miklós Hodászy, the physical education headmaster and school-inspector of the capital city, Budapest wrote as follows: “corrective-/therapeutic-/ physical education was introduced into the schools during the world war, when anaemia, abnormal body weakness or undevelopedness and incipient scoliosis

were detectable among students in the city... therefore it became necessary that those students who do not participate in ordinary physical exercises should receive separate special physical education. This was the time when the capital city asked for an expert opinion from the orthopaedists who suggested that the students being tend to have body abnormality should have received special physical education that is corrective-/therapeutic-/ physical education. Budapest capital city council had ordered therefore to introduce this kind of physical education temporarily in 1915.”²⁰

This is how the first therapeutic exercises within school framework had started in 1915 but with the difficulty that there were no qualified specialists. „Since there weren’t any physical education teachers with the suitable qualification, the capital city sent two distinguished female physical education teachers, namely Anna Kecskeméthy and Marietta László to a field trip to the school of Henrik Echternach school inspector in Hagen in Westphalia in order to acquire the system established by Echternach. The two teachers returned with exceptionally valuable experiences.”²¹

The first „corrective exercises” courses were opened with the leadership of the two, already mentioned teachers at the elementary school in Tímár street and at the civil girls school in the Lajos street. At the first exam of this course, Dr. Mihály Horváth university professor, who built his cures upon the gymnastics, stated among others that „Harms entailing the education and the consequences of the education needs to be healed in the school, with the means and methods available there. To reach the aim, therapeutic exercise courses are the best means and its social significance is increased by the fact that it is about to save the body integrity of many poor children.”²²

At that time therefore, the courses were able to be accomplished at more and more schools which was also contributed by the fact that physical education teachers were also trained for the task. The courses took place in three school years: in 1915-1916, in 1921-1922, and in 1929-1930. 120 specialists were trained in 20 hours per week where the following subjects were taught: theory and history of therapeutic exercises, orthopaedics, anatomy, hygienic, pathology, first aid, the physiological effects of motions, and the methodology and the practice of therapeutic exercise.”²³

We need to underline that we are still talking about therapeutic exercise but now, within school framework.

For a long time, only female students took part in the exercises since the specialists thought that girls are more susceptible to scoliosis because of their fast development and growth. They dealt with huge groups with 40 members, so it was impossible to make difference. This is why they were not able to handle with more serious deformities which needed more attention and treatment, therefore these children were absolved from the exercise. This is why they were able to deal only with mild spine deforms and weak back muscles.”²⁴

Since the school year of 1929/1930, the Hungarian Royal University of Physical Education- today Semmelweis University Faculty of Physical Education and Sport Sciences- took over from Budapest “the continuation of that important and national saving work on the field of therapeutic exercise which was done by Budapest for 15 years”

according to Miklós Hodászy.²⁵

As for Europe, there were steps forward in Germany between the two world wars. There the aim was to compensate the system of the German gymnastics on the apparatus (which was too stretched) with loosening the muscles.

The specialist developed different systems of gymnastics, therapeutic exercise and dance from which the most known is the Bode's gymnastics system and Doctor Bess Mensendieck's school. Under the influence of her thoughts and work, motion was seen as a curing method in Germany. She dealt mainly with the problems of the exercises for women.

It was new that her attention didn't focus only on the bony structure and the spine but also on the interaction of breathing and muscle work. First, Mensendieck called attention to the necessity of relaxing muscles.²⁶ He wanted to model the human body as a sculpture. He called attention to the work of every single muscle group with teaching the deliberate stretching and relaxing. Madzsar Józsefné Jászi Alice, who raised very learned and well experienced physiotherapists, introduced the Mensendieck's system in Hungary. In 1912 she opened her „Functional Gymnastic Teacher-Training College. Her gymnastic system consisted of body forming and artistic parts.²⁷

In the middle of 1930s, the notions of therapeutic exercise and therapeutic gymnastics are used in Hungary. This is proved by many literatures.

On the 6th picture Miklós Hodászy's manuscript of „The leading book and the methodology of teaching of therapeutic exercise for schools and for private use” can be seen.

Margit Kardhordó, Mária Las Torres and their colleagues wrote the manuscript of „Material of the therapeutic exercise courses at boy and girl elementary schools, civil girl and girl secondary school of Buapest” /see 7th picture/

Miklós Hodászy's manuscript of „The methodology of the corrective and therapeutic exercise at school can be seen on picture 8.

„Theoretical and practical guidelines for teaching of therapeutic gymnastics” by Margit Kardhordó and Miklós Hodászy in 1935 can be seen on picture 9. Dr. Boldizsár Horváth added the medical preface to it.

This book was recorded as the literature of training. The authors wrote the following words in the preface: “We recommend this work for doctors, special teachers, trainers in order to give guideline for strengthening the weak children and adolescents, for correction of weak posture and for preventing further worsening of scoliosis.”

In the history of the adopted physical education, it is an important milestone that the education of specialists was introduced at college level. Count Kunó Klebelsberg, the minister of religion and education approved the organizational statutes of the Hungarian Royal University of Physical Education by the decree of 77000/XIII and so could open the gates of the university in 1925. The minister dealt in his many articles and speeches with the pedagogic and hygienic effects of the physical education and sport. He wrote the following: “The narrow breasted, bespectacled child, who bends over his book all day long and in whose undeveloped chest and in unhealthy flat the screech-owl of tuberculosis builds nest, is not my ideal. I do not believe that sport would ever harm the English culture. There is no contrast between culture and sport, the belief of contrast exists only in the skulls which are covered by iron hat.”²⁸

From the school year 1929-1930, the correction gymnastic was taught as a compulsory subject then later in 1954, training on adopted physical education has started according to the initiation of Dr. Mihály Nemessuri with four semesters at the Kinetic and Adopted Physical Education Department.

(10. picture) This training was the guarantee that adopted physical education would have to be taught by special teachers who are prepared for the differentiated task properly and who would be able to supply the children left to their care successfully.

Conclusion

The medical science and sport historic researches revealed that body culture developed from the hunting of animals in the late prehistoric age and in the same time, the development of the curing gymnastics, which was the predecessor of adopted physical education, were characterized by accidental discoveries.

The form of exercises, which had curative effects on the body and its development, grew at the educated people in the antiquity.

The history noted more people who dealt with the curative effect of the exercises. The Greek Herodicus is held the father of therapeutic gymnastics. The Roman Galenus Claudius, the famous doctor of the gladiator school, was ahead of his time when he dealt with therapeutic gymnastics and curing massage.

The development stopped in the middle ages. Later in the 19th century, big changes happened in this field. The work of doctors and other specialists made it possible that the curing exercises and curing gymnastics could spread in Europe and in Hungary.

The Swedish Henrik Ling put the exercises on a scientific basis and harmonised it with the individual's life functions as a directed gymnastics. In Hungary, orthopaedic professors helped and supported the spread of the curing gymnastics.

The specialists recognised the usability of school frameworks in the beginning of the 1900s and therefore the education of therapeutic exercises at school started first in the capital city in 1915 and then it functioned as an adopted physical education further.

Since 1954, the Hungarian Royal University of Physical Education has started the training of adopted physical education teachers. Since then, this training has been uninterrupted both at teacher field of study and school- and kindergarten educators' professional training.

Without intending to be exhaustive, this study wanted to examine the historical development of this special field and also present some important literature.

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PTE TTK Testnevelés és Sporttudományi Intézet

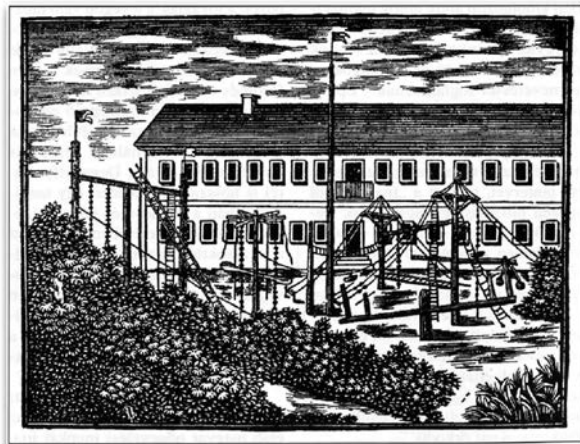
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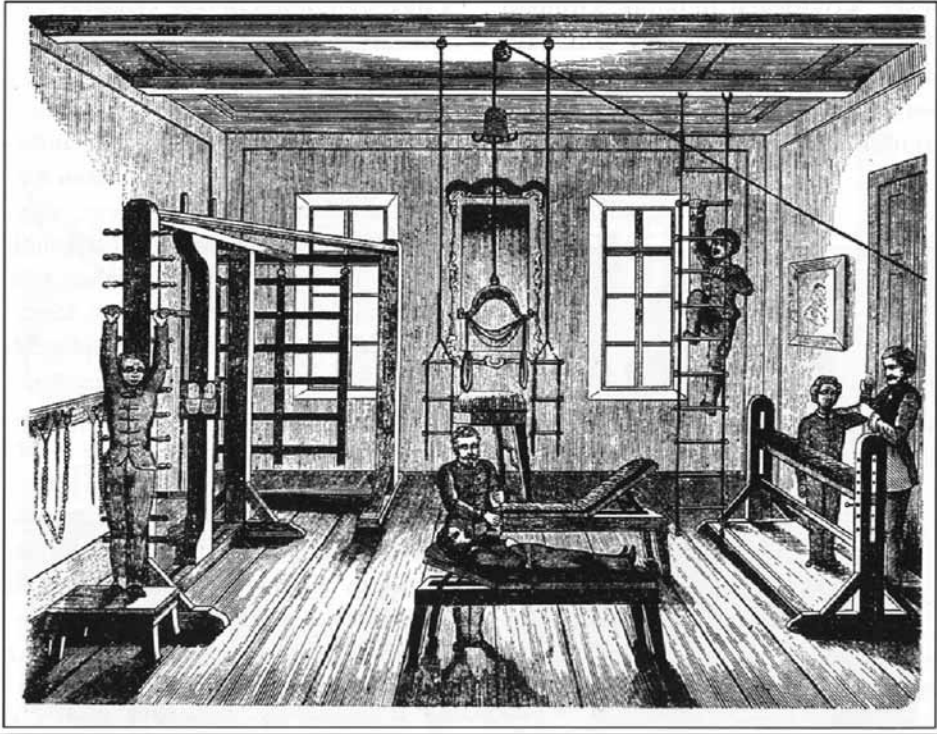
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Dr. Ágost Scheopf-Merei



3. picture
Pest Orthopaedics Institute



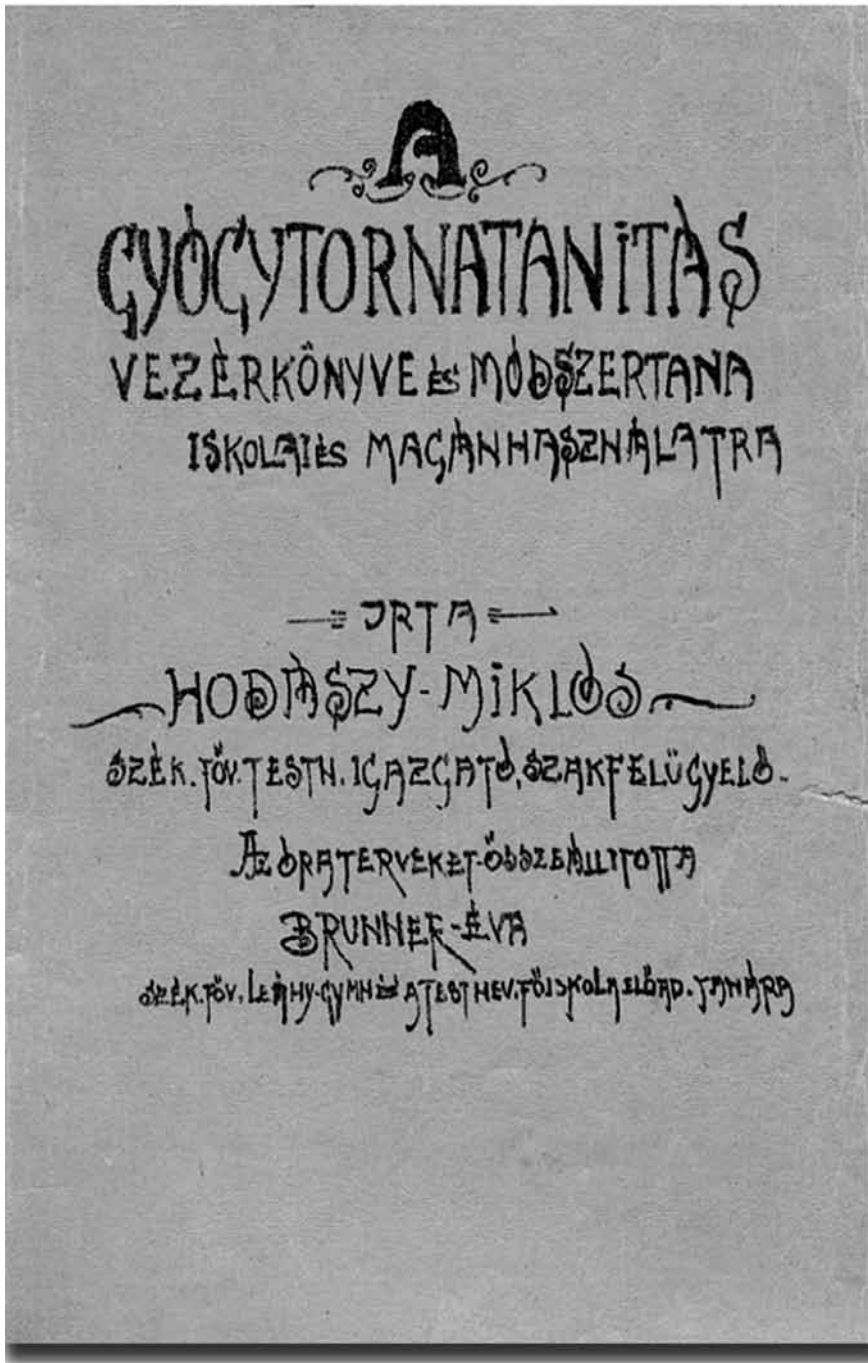
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Dr. Sámuel Batizfalvi's Swedish gymnastic room in Pest

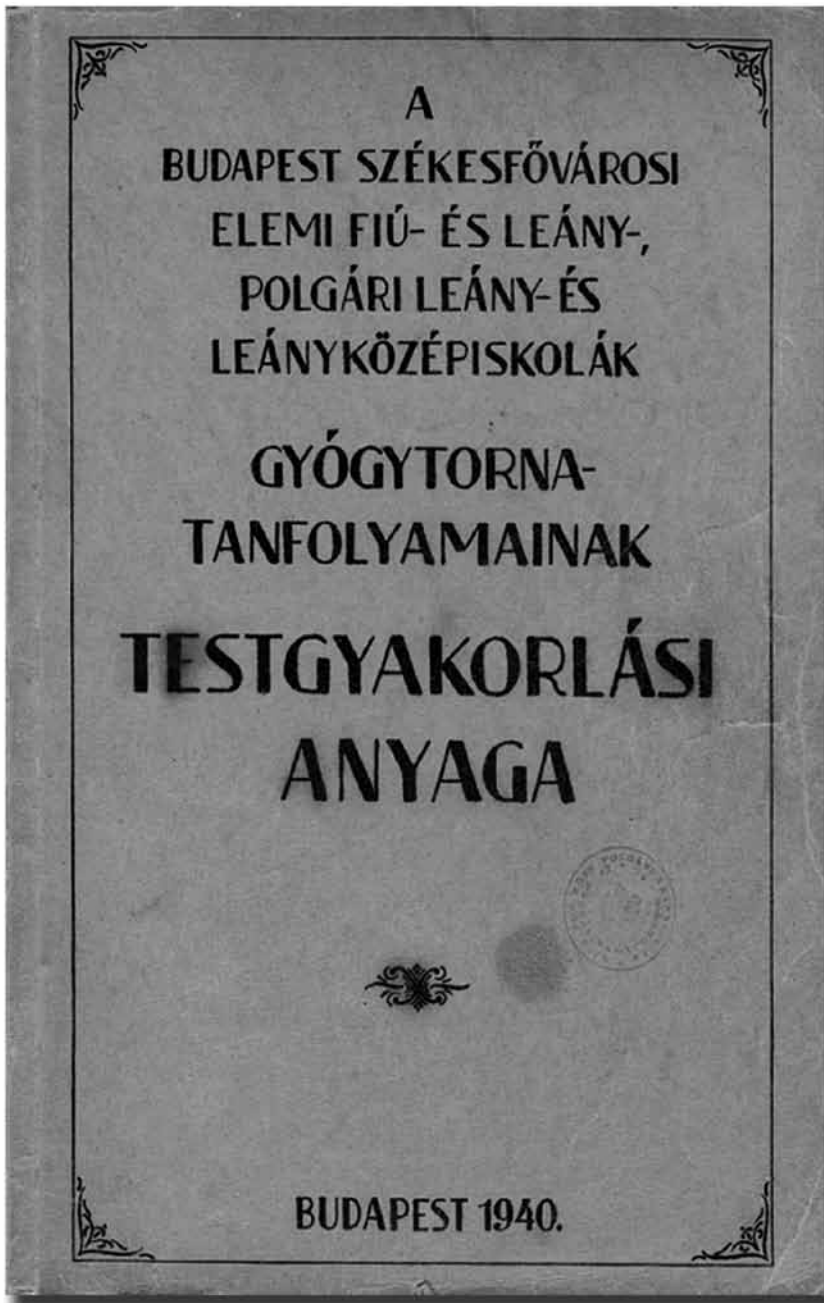


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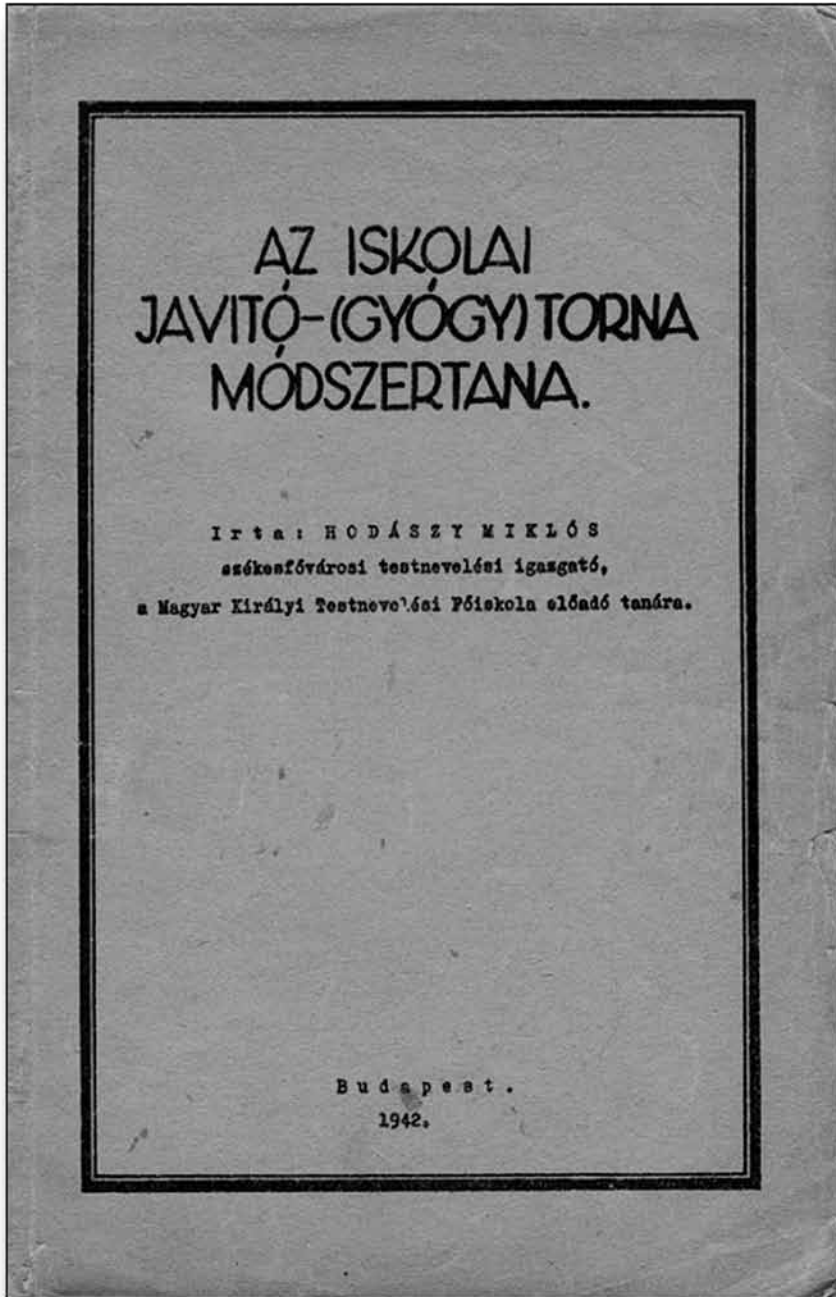
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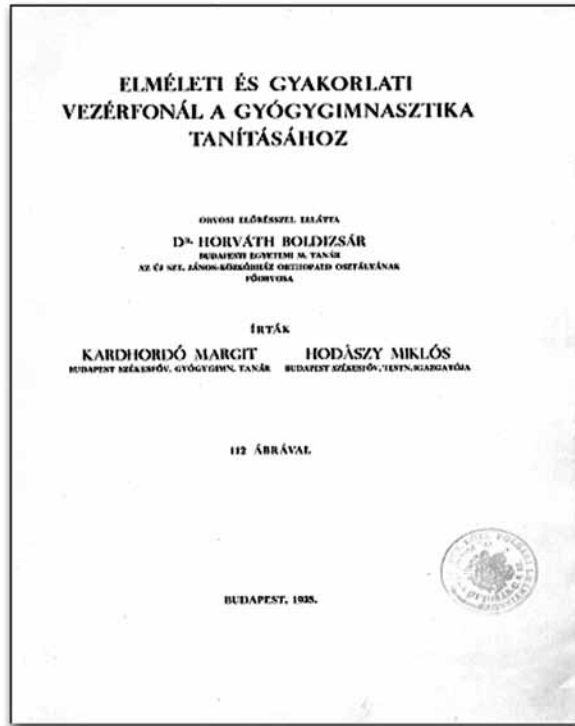
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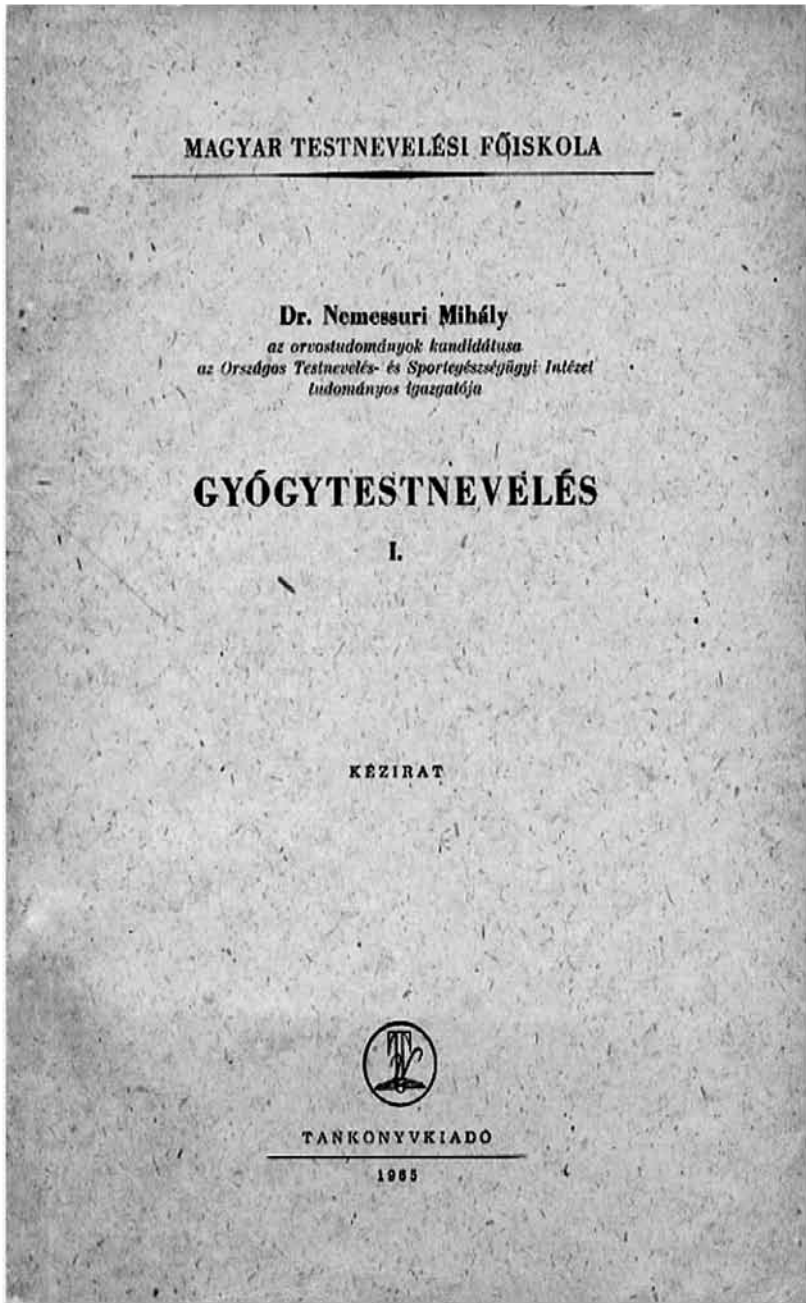
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BETEKINTÉS A GYÓGYTESTNEVELÉS TÖRTÉNETÉBE

*Christián Anikó**Absztrakt*

A történelem feljegyzett több olyan személyt, akik a mozgás gyógyító hatásával foglalkoztak. A görögök Herodikost tartják a gyógygimnasztika atyjának. A római Galenus Claudius, a gladiátor iskola nagynevű orvosa korát megelőzve behatóan foglalkozott a gyógygimnasztikával és a gyógymasszázsral. A középkorban a fejlődés megtorpant, majd a XIX. században nagy változások történtek e területen. Orvosok és más szakemberek munkássága tette lehetővé a gyógyító torna és a gyógyító gimnasztika európai és magyarországi elterjedését. A svéd származású Henrik Ling az egyén életműködésével összehangolt, irányított tornaként helyezte tudományos alapokra a testmozgást. Magyarországon ortopéd professzorok segítették és támogatták a gyógyító torna elterjedését. A szakemberek az 1900-as évek elején ismerték fel az iskolai keretek felhasználhatóságát, így 1915-ben indult el az első iskolai gyógytorna-oktatás a fővárosban, mely később gyógytestnevelés-kén funkcionált tovább. Az 1954-es tanévtől kezdve a gyógytestnevelők képzését a Magyar Királyi Testnevelési Főiskola vállalta fel. Azóta töretlen e képzési forma mind a tanári szakon, mind a tanítók és óvodapedagógusok szakirányú továbbképzésében. A teljesség igénye nélkül e szakterület kialakulásának történelmi folyamatába kíván betekintést adni e tanulmány, mely egyben bemutat néhány meghatározó szakirodalmat is.

The Author

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Her research area: the situation concerning adopted physiological education in kindergartens and at schools in the region of South Transdanubia, and opportunities for realising it.

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THE RELATIONSHIPS BETWEEN THE SPECIFIC LEARNING DISORDERS AND THE INTELLIGENCE STRUCTURE

GABRIELLA KIRÁLY

ABSTRACT

The study deals with the examination of the correlation of specific learning disability and intelligence-structure. The author supposes that dyslexic children's intelligence-structure shows typical diffused, heterogeneous image, furthermore, a significant deficiency can be supposed between verbal and performance intelligence.

During her own research, she compared dyslexic children's intelligence with average or above average IQ with those who have good reading skills. The examination method was supplied by MAWGYI-R, the Revised, standardized form of the Hungarian Wechsler Intelligence Scale for Children.

Her examinations suggest that dyslexic children's intelligence-structure shows typical diffused, heterogeneous image, comparing with their contemporaries with good reading skills. It is proved by significant deficiency between verbal and performance quotients in the intelligence test. Consequently, it can reasonably be supposed that reading disabilities, despite normal IQ, are caused by uneven, diffusive, disharmonic maturity of intellectual abilities.

Introduction

Based on the different hints to be found in the literature it seems – despite the terminology disorders and the high number of denominations – that the specialists are preoccupied with the growth of the number of children with learning disorders and the possibility of finding a solution to the problem.

The common parameter of the children with learning disorder is that they cannot cope with the demands of the primary school. Due to the frustration in time behaviour problems add to the problems related to performance. In case there is a lack in therapy or proper help the child may evolve in the direction of anti-social personality development. According to data from Germany 80% in case of individuals who commit youth crime had learning disorders at the beginning of school and during the early forms.⁸

In case of the children suffering from learning disorders several researchers consider it of a diagnostic value the prominently diffuse, heterogenic intelligence structure, and its uneven, diffuse maturation.^{9,10,11,12} Others emphasize the role of the differential-diagnosis of the significant differences between verbal and performance intelligence.^{13,14, 15}

The concept and reasons of the learning disorders

Learning disorders may occur at almost 15% of the children with intact intellectual capacity.¹⁶ The denomination of the clinical picture varies according to the author and the academy. The denominations may be classified onto two categories: the first one emphasizes the organic points of view, the second the particular phenomena and the effects.

Among the denominations used for the syndrome we are most likely to find the following: encephalopathy, MCD syndrome (minimal cerebral dysfunction), MBD syndrome (minimal brain damage), infant hyperkinetic syndrome, A.D.D.H. syndrome (Hyperkinetic Attention Deficit Disorder), sensory integration disorder, segment capacity disorder, neuro-genetic learning disorder, partial efficacy disorder, POS (psycho-organic syndrome), FI-MO-TA (Attention-Movement-Learning Disorder).

In conclusion the interpretation of the phenomenon of learning disorder is importantly influenced by the lack of the mutually accepted definition.

Porkolábne¹⁰ emphasizes five professional approaches based on the causes of the learning disorders and the accompanying symptoms.

- I. The neuropsychological researches seek the reasons of the learning disorders in such minor brain damages, which can cause extremely varied deficiencies due to the selective effects, but do not reach the level of a mental retardation.
- II. The researches based on the sensory-locomotor theories explain the learning disorders with the sensorial difficulties.
- III. Those who approach the problem on a behavioural psychological basis consider the learning disorders behavioural problems, and the correction as being effectively achievable by behavioural therapy.
- IV. The theories which emphasize the lingual development consider the lingual skills as being of a higher importance. They consider the academic achievements impossible without the necessary lingual development.
- V. The domestic children's psychiatry approach emphasizes the disorder of the integrating function between the two hemispheres of the brain.¹⁸

In connection with the origin of the disease the literature presents the following three views the most often:

- It develops based on the early brain damage (continuum notion)
- Biochemical, genetically determined disorder leads to the syndrome (syndrome notion), which is indicated by the frequent aggregation in families.
- The multi-causal approach mentions the polygenic origin- the interaction between the organic factors and the environment, and the summed effect of the biological, psychological and sociological effects.

The result is the disorder in the integrated co-operation between the two hemispheres of the brain, the process of the environmental stimuli in a special manner, the disorder of the Gestalt-view.

The relationship between the specific learning disorder and the structure of the intelligence

There is no comprehensive experimental material to be found in this field in the literature. Several researchers who have dealt with the different approaches of the learning disorder refer to the typically diffused intelligence structure of the children suffering from learning disorders.

N. SOMOGYI AND ORMAI¹⁹ have found the uneven, diffuse maturation of the intelligence as informative during the diagnosis of the encephalopathy based behavioural disorders.

BERGMANN²⁰ has pointed out that the early damage occurred in the nervous system leads to uneven development of the personality, which shows, besides the normal average achieved at the Binet IQ, disproportional partial achievements, which cannot be influenced positively by the favourable environment in the family.

ERDÉLYI and ORMAINÉ²¹ consider the average, or the above average, typically diffuse intelligence structure in case of the analysis of the MCD cases as being of a diagnostic value. They emphasize the low value of the mathematics and numeric sub-test, the divergence between the verbal and performance tests, and the divergence between the visual-motoric and visual-perception sets of tests.

DUKA²² emphasizes the importantly heterogenic intelligence structure in case of the psycho organic syndrome, besides the medium, good, or outstanding intelligence level.

HARASZTINÉ²³ has published the results of the tests of kindergarten children aged 5-6 who suffer from partial ripening disorder. Based on the study of the Binet intelligence test done in Budapest she states that the children endangered by dyslexia have produced very low results at the pure verbal questions (defining of antagonisms, concept defining), in case of the square drawing, and they had important difficulties in finding the proper words.

JÁSZBERÉNYI²⁴ states that according to the study special development of the children operated because of hydrocephaly, they often show diffuse intelligence structure.

He encountered the verbal dominance of the achievements when comparing the results of the verbal and performance tests (Brunet-Lézine development test). As he points out, in case of higher intelligence level the discrepancy between the achievement at the verbal and performance tests is smaller and to the fact that the shaping of the achievement structure depends highly on the accompanying damages.

MEIXNER²⁵ states, based on research of the Snijders Oomen test that the partial achievements of the dyslexic children are more diffuse than those who read well with the same IQ.

The hypothesis of the own research

My hypothesis is that the intelligence structure of the dyslexic children who suffer from special learning disorders shows a typically diffuse, heterogenic picture. This diffuse ripening may be shown by the significant difference between the verbal and performance tests at the MAWGYI-R intelligence test.

The **tested group** was formed by 30 2nd former children showing dyslexic symptoms with average or above-average mental abilities, who performed badly at reading.

The **control group** was formed by 30 2nd former children with average or above-average mental abilities, who performed well at reading.

Introduction of the experimental method

The MAWGYI is the Hungarian abbreviation of The Hungarian Wechsler Children's Intelligence Revised Test, which has been standardized.²⁶

The MAWGYI comprises of six verbal and five performance sub-tests. The verbal tests: general knowledge, General understanding, Counting thinking, Common meaning, Vocabulary, Figure repeating. Performance tests: Figure symbol, Picture completing, Picture organizing, Mosaic, Matching. The intelligence profile which results from the sub-tests assures a wide range of possibilities of the individual ability recognition. It is thus possible to recognize in a versatile manner the abilities of the children with learning disorders and this gives relevant data for the curing pedagogical psychology diagnostics. The interpretation of the ability profiles gives an excellent possibility for the shaping of the individual development programmes and the targeted correctional plans.

The method of processing the data

For the statistical processing of the data we used the program SPSS for Windows 8.0.

Results and interpretation

The statistical interpretation of the test results support the fact that the VQ-PQ difference between the test group and the control group is indeed significant and important.

The discrepancy between the verbal and practical tests at the patients suffering from dyslexia with specific learning disorders implies the uneven, diffuse development of the ability profile at these individuals.

In case we compare the three quotients (IQ, VQ, PQ) to each other, we encounter strong, significant discrepancies at all of them in favour of the control group.

When interpreting the results of the sub-tests we found significant differences in case of the abilities of the children of the same age who performed well at reading compared with those who had reading disorders (dyslexic) at five of the sub-tests. We found differences at two of the sub-tests, but these differences were not significant.

Differences with a statistical meaning were not proven without any doubt at three sub-tests, due probably to the narrowness of the sample.

Sub-tests showing significant differences: general knowledge, common meaning, vocabulary, figure symbol, picture completing.

Sub-tests showing no significant differences: general understanding, picture organizing.
Sub-tests showing ambiguously significant differences: counting thinking, mosaic, matching.

Summary

My researches have shown that the intelligence structure of the dyslexic children shows a typically diffuse, heterogenic picture compared to that of the children of the same age with good reading abilities. This diffuse maturation is shown by the significant discrepancies between the verbal and performance tests at the MAWGYI-R test. In case of dyslexics the difference between the VQ and the PQ values is important, much higher than at the children with good reading abilities. This difference shows that these children have to cope with such intellectual disorders, in spite of their intact intellect, which result in the significant differences between the verbal and performance abilities at the MAWGYI-R test.

In conclusion, it is safe to state that the reading disorder is caused by the uneven, diffuse, disharmonic maturation of the intellectual abilities- fact shown by the MAWGYI-R test as well.

I consider development diagnosis to be reached based on the complete ability profile as the practical yield of these results. The qualitative analysis of the test and the interpretation of the ability profiles offer a good possibility for the shaping of the individual development plans and the targeted correctional programmes.

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A SPECIFIKUS TANULÁSI ZAVAR ÉS AZ
INTELLIGENCIA-STRUKTÚRA ÖSSZEFÜGGÉSEI

Király Gabriella

Absztrakt

A tanulmány a specifikus tanulási zavar és az intelligencia-struktúra összefüggéseinek vizsgálatával foglalkozik. A szerző feltételezi, hogy dyslexiás gyermekek intelligencia-struktúrája típusosan szórt, heterogén képet mutat, továbbá a verbális és performációs intelligencia között szignifikáns eltérés valószínűsíthető.

Saját vizsgálata során átlagos, vagy azt meghaladó IQ-val rendelkező dyslexiás és jól olvasó gyermekek intelligenciáját hasonlította össze. A vizsgálati módszert a MAWGYI-R, a Magyar Wechsler Gyermekek Intelligencia-teszt Revideált, standardizált változata biztosította.

Vizsgálatai rámutatnak, hogy a dyslexiás tanulók intelligencia-struktúrája típusosan szórt, heterogén képet mutat jól olvasó társaikéhoz viszonyítva. Ezt az intelligencia tesztben a verbális és performációs quotiens közötti szignifikáns eltérés igazolja. Ezáltal megalapozottan feltételezhető, hogy az olvasászavart ép IQ ellenére, az intellektuális képességek egyenetlen, szóródásos, diszharmonikus érése okozza.

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Preface

Dear Reader, in your hands you are holding a volume of foreign language publications made by the professors of Social Worker and Social Policy Institute of PTE Illyés Gyula Faculty. The authors of the studies examine the Hungarian social politics from different points of view. In the collection we can find writings with historic approach (Janka Teodóra Nagy, István Varga), a publication which examines a segment of strategic planning (Adrienn R.Kiss) and a study, which—partly—with critical attitude analyses the formation of rural poverty (Krisztina Jász). Summarizing their special research – and professional experiences, the authors' main guiding point was to contribute to the solution of the problems which are in the focus of the social political sector and to enrich the knowledge too. We are hoping that in the future the studies, which can be found in the volume, will encourage those interested in the subject to think further towards the problems touched.

*Krisztina Jász PhD
editor*

JANKA TEODÓRA NAGY:

CSIZMADIA ANDOR, THE SOCIAL-POLITICIAN

ISTVÁN VARGA:

POVERTY CERTIFICATE, BOTH AN ADVANTAGE AND DISADVANTAGE

ADRIENN R. KISS:

ANALYSIS OF THE SOCIAL PLANNING CONCEPT OF THE MULTI-PURPOSE
MICRO-REGION ASSOCIATION OF BAJA, HUNGARY

KRISZTINA JÁSZ:

POVERTY IN THE RURAL HUNGARY

ANDOR CSIZMADIA, THE SOCIAL-POLITICIAN

JANKA TEODÓRA NAGY

Abstract

Csizmadia Andor, who used to be the head of the law history department in Pécs University from 1958-1980 is first of all regarded as a law historian by the professionals. However, while reviewing his publications related with the history of administration, a distinct group of studies and articles on social administration and social law can also be found. These studies completed with his practical activity carried out in this same field during his freshman's years, and also with his social political historical and social political studies, which assimilate his experiences while working on the concepts of government development 1960-1985, can be suitable to draw the social political portrait of the renowned law historian.

Csizmadia Andor, the law historian was an outstanding character of the Hungarian social politics and of the social law also. Just like in case of law history, he also had outstanding merits maintaining the continuity in this field. His character and his career spanned and bridged different eras. His start and formation of his social political notions took place in the most impulsive years between the two world wars, in the era of the „productive social politics”. After the Second World War he played significant role in creating and forming social policy of the socialist state, and beside having written one of the standard work of the Hungarian social politics history, on the eve of the regime change, when the social politics re-consolidated again, he made attempts to compose a new social political concept.¹

Csizmadia Andor, who used to be the head of the law history department at Pécs University from 1958-1980, is first and foremost recognized as a law historian by the professionals. However, while reviewing his publications related with the history of administration there is a characteristically distinct group of studies and articles on social administration and social law. These studies completed with his practical activity done in this same field during his freshman's years and also with social politics historical and social political studies which assimilate his experiences while working on the concepts of government development between 1960-1985, could be suitable to draw the social political portrait of the renown law historian.²

1 Lector: Prof. István Kajtár DSc

2 Kajtár 1980, 1987, 2001, Nagy J. 2005, 2010.

1. In the fascination of „productive social politics”

Before getting his law doctorate degree in Szeged in 1933, he had started his civil service in the administration of his hometown, Győr. During the 15 years in public service he completed tasks beside the cultural administration mainly in the field of social administration.³ From social political point of view the most determining five years from 1941-1946 were spent in the Mayor Office of Kolozsvár as the organizer and manager of the public welfare department, then from 1945 as the head of the law department in the Public Care Bureau, and from September of the same year he became the chief social inspector of the Public Welfare and Labour Ministry, after one year he worked as a the head of the social department.⁴

By the end of the decade the efforts made in the 1920-es, to apply the well-tested methods and tools in handling social problems turned out to be a mistake. As Polanyi Karoly pointed out starting from the beginning of the 1930-es a new phase started in the Hungarian economic and social history– and at the same time in the social politics as well. As the state role gets more and more significant in wider circle, including social politics, in parallel with the strengthened state role the principles of the so called „productive social politics” start to form. Esztergar Lajos defines the economy rules as an important tool to solve social problems, while Magyar Zoltan directly targets the elaboration of the social administration.⁵

This is the time when Csizmadia Andor gets in contact with the social politics, and through his practical activity and articles he becomes a significant character of the above mentioned social political line himself. Naturally, this does happen in a special way. From the very first moment, in his articles the historical interest and sensitivity toward the actual problems are present together–either examining the circumstances of mental stop-gap workers in Győr or the fields of family counselling in the Hungarian cities.

During the years as the head of the public welfare department in Kolozsvár Mayor Office the intertwining theory and practice, the parallel of the historical researches and present research is even more significant. This period between 1941-1943 can be called the most productive period of not just the young law historian but also the practising social politician. Beside forming and applying the productive social politics, for Csizmadia this is the time when the marginal field outlines, which he keeps going along and after three decades in the study „Change in the social provision Hungary” published in 1977 he summarizes the results of his researches. This is also the time when he writes his partial publications which can be called the eminent chapters of social politics and the summarizing studies on the examination of the economic and social role of the quarter-masters and the decimal masters in Győr, Kolozsvár, and the Transdanubian area, and finally in the Hungarian cities. In this period Csizmadia either directly or in his law historical studies indirectly, wants to find the answer to the contemporary problems,

3 Ádám 1980. 17.

4 Ádám 1980. 19, Kajtár 1980.

5 Esztergár 1933, 1939, Magyar 1939.

while continuing polemy on the activity of the employment agency or presenting the social policy of reform-era Kolozsvár, or citing the famine action of 1817.

One of the most significant event of the above period, which affected Csizmadia's whole activity (however it can be seen most obviously and directly in his research made at the Sociographical Institution in Eger at the end of the 1940-es) was when he learned about the results of the examinations carried out by Magyar Zoltan in the Economic Institution. Magyar together with his students carried out „fact-finding examinations” in Komárom County, especially in Tata district, assessing the social situation of the individual villages. Csizmadia acknowledged the researches with utmost appreciation, and regarding the subject he started a serial in the Erdelyi Tudósító (Transsylvanian Correspondent). The impact of Magyar's studies on Csizmadia Andor made him carry out a similar complex social administration review in relation with the villages in Veszprém County, which results were published in 1959. Magyar Zoltan was the chairman of the committee which assessed the essays written for the national tender made by the National Alliance of Hungarian Cities in 1942 with the aim to simplify the urban administration. When assessing the essay handed in by Csizmadia Andor, Magyar emphasized the approach starting out from the „communal interest”, which is close to his own view and praised the elaborate, comprehensive racionalizing suggestions regarding the special administration – so the social administration – which showed significant practical experience.⁶

2. The social politician of the socialist state

After World War II the well-established social administration organization in which Csizmadia Andor was one of the leaders in 1946, tried to solve the problems within its competence, like poorness, refugees' problems, care for the homecomers from war and deportation, housing problems, social security, child care and public health. However, the process which meant to eliminate social political councils and committees consisting of the representatives of the social administration bodies and civil organizations, started from the second half of the 1940-es and by 1950 it ended up.

These years Csizmadia Andor seemed to definitely turn away from the social administration, and social politics and to continue his activities as a law historian teaching and researching mainly constitutional law in the frame of the higher education. But even these years a continuity can be observed in the broken career: as the head of the Hungarian constitutional law department at Eger Law Academy, he continued teaching in the administration course in Eger, and he organized the Institute of Sociography where he and his colleagues mainly researched the law customs of the Palóc.⁷ And when in 1949 he got in the Department of Constitutional Law of Eötvös Loránd University, he did not just write a constitutional law course book and join the research and

6 Ádám 1980. 18-19.

7 Nagy J. 2010.

workings on the advanced parliament traditions but also initiated several courses of lectures on administration law, wrote studies on the administration history, and in 1956 he defended his candidate's dissertation too.⁸ After getting the assignment to Pecs, in 1959 we can see him together with Beér János, Kovács István and Szamel Lajos, as a member of the committee preparing working material for the Social political committee in the Health Ministry.⁹ After creating the councils in 1950 the health and the strictly defined social tasks got separated. The Act IV of 1950 put down the reorganization of the Public Welfare Ministry into Health Ministry, therefore resolution of the social tasks temporarily got in the competence of the Home Affairs Ministry. A couple of years later the 1067/1953 (X.29) MT decree created the National Social Political Centre, the nationwide ruling body of the social administration which soon ceased to exist referring to the rationalization of the administrative management and its tasks were conferred to the social political department of the Health Ministry (child protection and guardianship tasks were taken by the Educational Department).

The social political permanent committee of the parliament between 19 June and 19 July 1957 examined the problems arising in the field of social care. It was stated that the partitioning of the social administration was the obstacle that prevented the efficient operation (for instance in 1957 budget the 250 Million forints set apart for social tasks was divided into 27 different items, except 2 ministries). In order to rationalise the organizational system of the social administration the parliament committee gave priority to clarifying the concept of social provision therefore they appointed the social political department of the Health Ministry to organize a working team for discussing and working out „the theoretical problems of the socialist social politics”.¹⁰ The members of the working team according to the Social Political Report were „the most excellent theoretical and practical experts, university professors, dons and social political group leaders”. Among the assigned experts, who were famous for their practical and research experience in the social political area, Csizmadia Andor was also present, and as the leader of the first working team he was responsible for clarifying the conceptional problem of social provision. The ministry also intended to publish the study in Beér János's edition, for which the theoretical problems were discussed on 26 September 1959 in the social political department of the ministry, and for the social leaders' course it was issued as an independent chapter of the coursebook in 1960, four years later it was also published in the journal *State and Administration*.¹¹

As the editor Beér János emphasised in the introduction of the planned issue, „the studies do not represent an official standing point, they represent the scientific point of view of the authors”.¹² In case of Csizmadia Andor, on the basis of the differences in the individual text versions and their firm sameness we can track down the formation of the

8 Ádám 1980. 20.

9 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980) 382.

10 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980) 382.

11 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980) 382.

12 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980) 382.

concept on the social politics of the socialist state and a more and more differentiated outline of the concept, the task and organization of social provision.

According to Csizmadia the social politics of the socialist state is nothing else than „complexity of principles of the organized state provision for the citizens”.¹³ This notion which was derived from the constitution as equality of the citizens, was further structured when he defined the social politics in the socialist state in a wider and narrower sense. In a wider sense the social politics means elaborating the principles by which the workers can get maximum provision for their growing material and cultural needs. for instance wages, fringe benefits, other indirect social provisions, housing, community services, etc.).

Social politics in a narrower sense means „principles elaborated and carried out by the state in order to provide living for the families and individuals in case they get endangered by their age, health condition, or unexpected events as well as natural disasters”.¹⁴ The social security, as its services (for instance sickness benefit, old age- and disability pensions, widow- and orphan allowances) are tightly related with the wages, belongs to social politics in a wider sense, regarding its service aims and the beneficiaries it belongs to the social politics in a narrower sense, according to Csizmadia. He stated that differently from the social politics of the bourgeois era, provision in the socialist state is not „charity”, it is legal part of socialist division of the national income but the guidelines are special: not the work but the needs.¹⁵

Csizmadia Andor already used the term of social provision in his earlier studies, but in this material dealing with the mentioned theoretical questions- as well as in his latter publications- he separated it from the generally used but not yet defined term of care and clinged consequently to it, defined its content and separated from other terminologies.

He considers social provision as an activity materially carrying out the principles and tasks (for instance providing sickness allowance, financial aid, operating homes) which the state can carry out through its special organizations in tight cooperation with the civil organizations.¹⁶ The two distinct forms of the social provision are the social management and the social care, with the basic difference between them that the management is an official activity, while social care is a helping activity, but despite their obvious differences in practice they tightly belong together.¹⁷

In case of social provision, Csizmadia also differentiates its concept in narrower and wider sense. According to his point of view the services of the social security also belong to the wider sense of social provision, while mother and infant protection, child

13 Csizmadia 1964. 116.

14 As early as in this article, Csizmadia Andor regards social work as an activity based on social politics in a narrower sense. Csizmadia 1964. 117.

15 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980)

16 Csizmadia also gives an approach to the term „Social Law”, when he describes the complete regulations regarding the social provision in the socialist state. Csizmadia 1964. 118.

17 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 382. 11, 23-24. In his article published in the journal State and Administration, the parts regarding this issue were left out, and the original last paragraph was replaced with the coordination of governmental and social activities, and the development of the nationalization in the field of social work.

and youth protection, provision for pensioners (old aged), the war invalid and those victims of natural disasters and finding solution for special social tasks belong to the narrower concept.¹⁸

In the ministry discussion essay Csizmadia even more firmly represents the concept that in case of social provision administrating and official activity is essential. The social administration cannot be restricted to some special administration activity of the state but after urgent clarifying of the theoretical questions and defining the direction of development the harmful disintegration must be eliminated.¹⁹ In the essay he does not talk detailedly about this question, and in his study published in the journal *State and Administration* he rather examines the opportunities of nationalization.²⁰

The VII Congress of MSZMP in 1959 makes a decision about improving the living standard, and providing for the old aged, disabled workers and children. On arising questions while carrying out the decision, more and more people visit Csizmadia Andor with professional tasks, and by the middle of 1960-es even in the highest party-, state- and government circles he is regarded as a recognized expert on social political issues. Although there are some who argue the definition of the social provision,²¹ he is a regular participant in the consultations organized in the Health Ministry; his article, which was published in the journal *Public Health* in 1960, is a compulsory reading in the trainings organized by the ministry (so in the physician actualizing trainings), and his opinion is required during social political plannings and alterations.²² His suggestion, regarding the VIII Congress of MSZMP in 1962, on how to perform the decision defining the social political aims of the socialist state in February 1963, re-assesses the theoretical questions according to the international and constitutional law environment.²³

3. Social political-historical synthesis

We have already talked about the duality which characterizes Csizmadia Andor's career: the joint presence of practice and research. About how an individual subject encouraged a historical research, or how a historical question gave answer to the contemporary problems. One of Csizmadia Andor's appraisals says while his scientific career is characterized with the series of changes on the other side almost all of his topics follow his career: he is able to economically use his material collected earlier.²⁴

This statement has a special validity in case of the summarizing study „Changes

18 Csizmadia 1964. 121.

19 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 382.

20 Csizmadia 1964. 127-128.

21 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 353.

22 Csizmadia 1960a. 181-187, Csizmadia 1960. PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 353.

23 Csizmadia 1960a. 181-187, Csizmadia 1960. PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 353.

24 Kajtár 2001. 179-180.

in Social provision in Hungary” published in 300 copies in the series „Development of administration” in 1977, which was completed in two years only and which made Csizmadia the defining character of the Hungarian social political history.

Csizmadia Andor was appointed by the Sociological Research Institute to discover the start of the social political administration in Hungary, as Kulcsár Kálmán, the editor of the series says so that „the researchers, who analyze the problem from historical-sociological point of view, could have a relevant administration-law-history base material”.²⁵ The material of the volume was prepared in two parts: the author got assigned on 12 September 1975 to write the chapter „Administration of poorness” and he handed in the work in volume of 11 sheets on 15 October 1975.²⁶ He signed the contract for the second part on 11 December 1975, agreeing to complete it in volume of 10 sheets by 30 November 1976 with the title „Productive attempts of the social administration”.²⁷

This social political synthesis cannot be seen as unprecedented, rather as a summary of Csizmadia’s researches and publications on social administration-history and social law. Its pages reflect law historical publications written between 1941-43 (for instance the quarter-masters, the decimal masters, the poorness relief under the Transsylvanian Government, the famine action in 1817). The first drafts of the work can be met in the pages of the course book issued for the social institution leaders’ courses.²⁸

But all these are present in the summarizing study as parts of a process which intends to disseminate the individual stages of the alterations of the state social politics. To present the road in which „a definitely conservative, paternalist, traditionally poorness centered social politics gets to accepting social questions as institutional or even institutionaled public task forms”.²⁹ All this is made so objectively, moving with impressing confidence in the space and time, at the same time well-showing the changes so that the reader will realize the contingency, and gap-toothed nature of the part dealing with poorness administration only after detailed, thorough and comprehensive presentation of the productive social politics. When dealing with the poorness administration first he examines the buds of the feudal era, most of all the urban poorness, then he tells about the social politics of the enlightened absolutism, and after that the social provision before 1848 in Hungary and Transsylvania. In the mirror of his own research he presents the social political experiments of the bourgeois era up to the first world war, after this the social provision of the Hungarian Council-Republic, finally he disseminates the social political experiments up to the second world war, with a special view of the poorness administration in the capital city. The more significant part of the study volume is the detailed dissemination of the productive experiments

25 Csizmadia 1977. 1.

26 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 194.

27 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 190.

28 Csizmadia 1960. 27-49, 1964. 114-129.

29 Öry é.n. 2.

of the social politics, to which Csizmadia himself also contributed.

Certainly the inequality of the different parts does not derive anything from the scientific significance of this book written by Csizmadia Andor. Szentpéteri István, the consultant lector of the study emphasises the wide scale of the written material,³⁰ Óry Csaba, the social politician says that without Csizmadia's study volume, the history of the Hungarian social politics until the last times has remained a „white spot” in the history-science.³¹ This is the first social political historical work in which „the obligatory condemnation of past was forced behind the facts, ideas, institutions, in which we can read acknowledging assessments of individual social political experiments, ideas”.³² They became stations, milestones of the social political-historical and social work-historical reviews born since then.³³

4. On the doorstep of the revival of social politics

Up to 1981, among the central administrative bodies the social political tasks of the Labour Ministry got more and more determining, but after that almost all ministries and main authorities were given social administrative tasks and authority. The disintegration which had already been condemned in the 1950-es could not be eliminated. All these resulted that on one hand the area did not have a real owner, and on the other hand with the great disintegration the social administration in some ministries was pushed in the background behind the special tasks.³⁴

The turning point in the Hungarian social administration history was in 1988 when with establishing the Social and Health Ministry, the basic condition to get organized as a branch and the integrated administration was created. Following this in 1990 the Public Welfare Ministry was organized, which was altered in 1998 into Social and Family Ministry.³⁵ According to the 142/2002. (VI.28) Government decree, the central administrative body, presently called Youth, Family, Social and Equal chance Ministry, was operating as Ministry of Social Affairs and Labour.

As a reaction to the fermentation starting from the 1980-es Csizmadia Andor wrote his last study on social politics in 1983. Although the author pledged to publish the historical analysis in footnotes, this was thwarted by his death in 1985. In the above article Csizmadia Andor wanted to actualize the social administration model drawn at the beginning of the 1960-es in the reflection of the social changes. Certainly he maintained his interest in clarifying the conceptual questions. He clinged to the consequent usage of the term social

30 PTE Levéltár Dr. Csizmadia Andor irathagyatéka (1960-1980). 190. Szentpéteri István 1.

31 Óry i.m. 2.

32 Óry i.m. 2.

33 Pik 2001, Barker-Almásy 1996.

34 Nagy J. 2004. 43.

35 Nagy J. 2004. 43.

provision, in case of the social politics and in case of the more and more important social work he adjusted the definition to the circumstances, as he regarded the state social politics as complexity of principles which define the social work and the normative rules.

In comparison with the written before, as a new point of view arises, the separation of the social politics and social provision from functional side, as he considered the task of social politics as planning and regulation, and the task of social provision as execution.³⁶

After defining the notion Csizmadia misses the comprehensive concept of social politics in narrower sense, and also the independent organization which realizes it. In order to establish them – going back to the idea of 1959 – he urges realization of integral, efficient social politics (eliminating the disintegration, partitioning), in which the family is the starting point.

Regarding organizing the social administration Csizmadia considers the National Social Political Centre established in 1953 as an example, and he emphasizes the importance of a professionally well-trained central directing-administrating organization and training.³⁷ The strength of this article is in the problem sensitivity of the author, but as a law historian he rather looks backwards urging the realization of past solutions in the contemporary setting. From the Hungarian social political history he mentions institutions and organizations which used to show achievements in the past but the progresses which reflect the economic and social changes already shape different direction.

Csizmadia Andor, the law historian was an outstanding character of the Hungarian social politics, and together with it of the social law also. Just like in case of the law history, he also had outstanding merits maintaining the continuity in this field. His character, his career spanned and enbridged different eras. His start, and forming his social political notions took place in the most impulsive years between the two world wars, in the era of the „productive social politics”. After the second world war he played significant role in creating and forming the social politics of the socialist state, and beside having written one of the base work of the Hungarian social politics history, on the eve of the regime change when the social politics re-consolidated again, he made attempts to compose a new social political concept.

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³⁶ Csizmadia 1983.

³⁷ Csizmadia believes that for the people involved in the social work training should also be provided and he also reminds that in the 1933/1934 academic year a social course was launched at the Faculty of Law in Pécs and this was the place where the idea of founding an independent Department of Social Politics emerged in 1940.

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CSIZMADIA ANDOR, A SZOCIÁLPOLITIKUS

*Nagy Janka Teodóra**Absztrakt*

Csizmadia Andort, aki több mint két évtizeden keresztül, 1958-1980 között a Pécsi Tudományegyetem jogtörténeti tanszékének vezetője volt, a szakma elsősorban jogtörténészként tartja számon. A közigazgatás történetéhez kapcsolódó publikációi áttekintése során azonban szembetűnő a szociális igazgatás történetére vonatkozó, illetve szociális jogi tanulmányok, cikkek karakterisztikusan elkülönülő csoportja. Ezek, kiegészülve pályakezdésének e területen végzett gyakorlati tevékenységével és a kormányzati fejlesztési elképzelések kidolgozása során szerzett tapasztalatokat feldolgozó 1960 és 1985 közötti szociálpolitika-történeti, szociálpolitikai tárgyú munkáival, alkalmasak lehetnek a neves jogtörténész szociálpolitikusi portréjának felvázolására is.

A jogtörténész Csizmadia Andor kivételes egyénisége volt a magyar szociálpolitikának – s ezzel együtt a szociális jognak is. Miként a jogtörténet esetében, e területen is kiemelkedő érdemei voltak a folyamatosság fenntartásában. Személyisége, munkássága korszakokat ívelt át és kötött össze. Indulása, szociálpolitikai nézeteinek kiformalódása a két világháború közötti időszak legimpulzívabb éveiben, a 'produktív szociálpolitika' időszakában történt. A második világháborút követően a szocialista állam szociálpolitikájának kialakításában, formálásában játszott meghatározó szerepet, és amellet, hogy ebben az időszakban megírta a magyar szociálpolitika-történet egyik alapmunkáját, a rendszerváltás előestéjén a szociálpolitika ismételt megerősödésének időszakában a jelen problémáira választ keresve kísérletet tett egy új szociálpolitikai koncepció megfogalmazására.

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POVERTY CERTIFICATE, BOTH AN ADVANTAGE AND DISADVANTAGE

ISTVÁN VARGA

Abstract

Before 1945 the poverty certificate with its sad memory was in use in Hungary. As for its functionality, it provided tax- and fee exemption in case of court- and official proceedings for those with low income and property. As for its methodology, in order to qualify for this poverty certificate, one had to obtain a certificate issued by the municipal administration. The official authority, (called administrator today), took a “quasi site-study” in which they tried to investigate the living conditions of the applicant. Therefore, on one hand it was advantageous for those affected since they could save money and could get access to services which might have been unavailable for them. On the other hand it was disadvantageous since it was a stigma on the affected people; thus marking them invaluable. To understand its deep effect: the stigmatizing meaning of the poverty certificate has survived and does still exist in the Hungarian language.¹

Key words are: poverty certificate, certificate, advantage, disadvantage, living conditions

Introduction

Social policy has a specific interpretation which equals with poverty policy. This divides the needy to worthy and unworthy poor, and for deciding which category someone belongs to requires individual judgement.² An “outstanding” tool for this is means test or life circumstance evaluation.

During the development of social work, in the era of care for the poor it was a common practice that the living conditions and moral behaviour of applicants were carefully considered in order to decide whether they are worthy or unworthy for receiving allowances.

For this, effective administration framework had to be developed. In 1869 the Charity Organisation Society was founded in London. COS strived to provide selective support by examining the circumstances of the applicants, while exercising control over the recipients. Later, this effort was permanently present in the aid system and is still

1 Lector: Dr. Gábor Juhász DSc.

2 Ferge 1991. 77., 1987. 22-23.

haunting in the work of the authors preparing life circumstance evaluation which can also be seen in the current Hungarian practice.³

We agree with Lajos Szabó, it is doubtless that means test is one of the tools of selection opportunities. It fits in the income an existence statement mentioned by Townsend, which are the means of selectivity.⁴ According to him the disadvantages of selective allowance: 1. a part of the people entitled for it does not apply for it, therefore it has low efficiency, 2. it is difficult to adjust the official regulation to individual circumstances, therefore it is not practical, 3. it amplifies those circumstances which it is supposed to weaken, namely the social inequalities.⁵

The dictionary of social work does not mention life circumstance evaluation as an independent entry, emphasizing that it is not a tool of social work. However, the complexity of the situation is indicated by the fact that the following can be read under the entry of „Family visit”: *„It is a social worker activity during which the client is visited in his or her home. It could have different purposes and reasons: it can take place due to the fact that the disabled client would not be able to visit the service institution otherwise or because the professional would like to make the helping process more efficient for the client in a more familiar environment, or with the intention of involving the neighbours, or as an official action, in order to conduct a **life circumstance evaluation**”* (highlight V.I.)⁶

In this present study I wish to present Poverty Certificate, one of the „predecessors” life circumstance evaluation. This definition of „forerunner” however is not quite right, since these two types of forms co-existed. Life circumstance evaluation or means test was regulated as early as in 1908 by law article XXXVI. and in 1909 by the 27.100/1909 decree of the Royal Hungarian Ministry of Justice.

1. Legislation Related to Poverty Certificate

In the modern sense, the expression Poverty Certificate bears pejorative connotations. The phrase „He has issued the Poverty Certificate for him- or herself” is sometimes used in vernacular Hungarian, meaning the person concerned did something which does not quite match the customs or norms.

The original meaning or poverty certificate, however, is quite different. During the court proceedings it provided duty fee procedure fee exemption for the for people with low income and disadvantageous financial position. According to the 115. § of I/1991 law article regarding civil procedures (hereinafter CP). *„The granting of poverty rights can be applied for at the court of the legal procedure either in writing or by word of mouth. ... Besides the application, the official certificate has to be presented which certifies the job and financial situation of the party, the amount of direct tax he or she supposed to*

3 Szabó 1999. 12-14.

4 Townsend 1991. 214.

5 Townsend 1991. 217-219.

6 Gosztonyi-Pik 1998. 30.

pay furthermore the circumstance that his or her income does not exceed the ordinary daily wage usually paid at his or her place of residence.” By taking the circumstances into consideration the court can grant poverty rights to a party who could not cover the cost of legal procedure without undermining his or her living or undermine the livelihood of those relatives of his or hers whose livelihood is his or her obligation according to the law or legal practice.⁷ Therefore at that time the legitimacy was related to the income of the daily wage which is analogous with the minimal wage not existing then, while geographical features were taken into account. At the same time, the opportunity for discretionary decision remained in practice, (using today’s terminology again) for the people having higher income than the daily wage, if their income per capita was low due to the high number of dependents.

Due to granting the poverty rights, the party concerned:

- is exempted from paying stamp duties and other duties arise;
- is not obliged to give assurance for covering the costs of the legal procedure;
- win the right for having an attorney appointed for him who is obliged to represent him at the court free of charge;
- is exempted from paying the court delegates’ fees, salaries of witnesses and experts, the expenses of the necessary advertisements and procedure expenditures.⁸

However, he or she is not exempted from every expense, because granting the poverty rights does not concern the obligation of the reimbursement of legal cost of the other party.⁹

Even back then there were people who took undue benefits, therefore the regulations covered this case as well. The court of the legal procedure could ex officio withdraw the poverty right at any time of the procedure in case the conditions for poverty rights were not met or became non-existent. Moreover, the people who were granted poverty rights by means of forged data could expect a fine of up to six hundred Hungarian Crown.¹⁰

The workload of the court and the costs were decreased by the clause of the regulation according to which the attorney assigned for representing the poor party would request the withdrawal of poverty rights at court in case the litigation seemed pointless in advance.¹¹

2. Practical Application of Poverty Certificate

I met the use of poverty certificate during my researches concerning illegitimate children. Children born out of wedlock were meant illegitimate children in Hungary before 1946. They formed a special layer of society which does not exist anymore. Their special status

7 CP. 112§.

8 CP. 113§.

9 CP. 114§.

10 CP. 118§.

11 CP. 118§.

resulted from their legal status which bears the following characteristics: ¹²

- 1./ Bears his or her mother's maiden name as a surname.
- 2./ Gets the mother's nationality and religion.
- 3./ His or her residence is determined by the mother's residence.
- 4./ Only his mother and his blood relatives are legally related to him.
- 5./ He or she is entitled for inheritance regarding his or her mother and his or her blood relatives only.
- 6./ The mother is the natural and lawful guardian, in cast the mother is underage* the guardianship authorities shall assign a guardian.
- 7./ The natural father's only obligation for the child is to pay the child support fee. (The father has not family relationship with the child.)

These serious legal disadvantages caused deprivation which affected the lives of the children concerned, severely limited their opportunities for social mobility, and it is not an exaggeration to say that, considering their rights, they were second-class citizens.

Their emancipation is expressed by the §19 Act 1946 XXIX according to which : *“A child born out of wedlock is the relative of both the mother and the father and their respective relatives ... he or she is entitled to or obliged by the rights and duties as if he or she had been born in marriage.”* For further information on illegitimate children see:¹³

In my earlier researches I tried to find answer to the question what kind of allowances system existed for the unmarried mothers and their families. What help could they expect for raising their children. I examined the social policy situation where the living of the illegitimate children and their respective mothers were provided by the state indirectly by means of child support allowance. Besides the low-level care of municipal aid this child support allowance was the source of living for the mother and child concerned. I suppose that the presentation of the court's way of forcing the child support fee, following the surviving archival sources, shall provide a good clue for getting an insight into the situation of illegitimate children. The child support litigations, in the first instance, were held at the district courts, because the litigations related to child support belonged to the responsibilities of district courts.¹⁴

During my research, I processed the period of 1926-937 of the District Court of Dombóvár.¹⁵ The quantitative illustration of the research is shown in table 1.

12 Csorna 1929. 127-128., Esztergár 1936. 128-130., Cziglányi 1939. 33-41.

13 Varga 2003, Varga 2006, Varga 2007.

14 CP. 1§. 2. i.

15 Dombóvár is a regional centre in Tolna County, in South Hungary.

Litigations on the area of the District Court of Dombóvár 1926-37 (Table 1.)

Year	Litigations total	Child support litigation	Litigation documentation found
1926	3,956 instances	5 instances (0,126 %)	3 instances
1927	4,548 instances	8 instances (0,176 %)	6 instances
1928	4,593 instances	5 instances (0,109 %)	3 instances
1929	5,520 instances	8 instances (0,145 %)	7 instances
1930	5,641 instances	6 instances (0,106 %)	1 instances
1931	4,317 instances	7 instances (0,162%)	3 instances
1932	3,966 instances	12 instances (0,302%)	8 instances
1933	3,081 instances	9 instances (0,292 %)	5 instances
1934	2,781 instances	13 instances (0,467%)	11 instances
1935	2,936 instances	4 instances (0,136 %)	2 instances
1936	2,971 instances	11 instances (0,370 %)	8 instances
1937	4,018 instances	11 instances (0,274 %)	10 instances
TOTAL:	48,328 instances	99 instances (0,205 %)	67 instances

(Source: by authors)

During the research information can be gained from:

- Letters of law suits
- Birth certificates
- Rrecords
- *Poverty certificates* (highlighted by I.V.)
- The verdict

Considering the present scope of study I wish to address the issue of poverty certificate only. For further on the research see:¹⁶

In the material examined in almost every case the person entitled for poverty rights had been the claimant, and in many cases the defendant as well.¹⁷ It is particularly interesting that when the courts of the time formed their sentences they determined the amount of alimony according to the social status of the child and the mother, and did not take the needs into consideration, which is natural today. For example, the court justified the amount of alimony this way: “*The court has taken into account the low social status and poor financial situation of the parties. The claimant has practically no property of any kind, he only lives on his daily wage. Therefore the court finds that it is the amount of 16 P that is needed for the minimal maintenance of a child of this social status (highlighted by I.V.), and which amount the defendant can give up without threatening his livelihood, considering the fact that a day labourer has at least 70-60 P. income a month.*”¹⁸

This way social mobility was severely limited by the approach of the court, namely that they took social status into consideration instead of needs. And the certificate of

16 Varga 1995, Varga 1999.

17 Giving birth to an illegitimate child, however, cannot be defined as being solely a poverty problem.

18 Tolna County Archives P.3179-1929.

poverty itself gave a good clue for determining and checking this social status, moreover, it resulted in preserving the prevailing status quo. It was a cause and effect in one.

The forms of Poverty Certificate

As it was seen before, in order to apply for poverty rights the official certificate had to be presented. The issue of whether or not a person is entitled for it was examined and checked by the municipal administration. The notary, the judge, the magistrate, the official person (today clerk) took an issued a „quasi means-test”.

Comparing the two poverty certificates (due to spatial limitation I present hereby only 2) the following can be established. Since the relevant legislation determined only content requirements, and it did not deal with the format, there were several kinds of forms in use. Although these contain more or less the same amount of information there were subtle differences in them. For example, in the poverty certificate Nr 2 the form provides ample of space for enumerating the data where the data of the questionnaire had been taken from. Moreover, it gives opportunity to indicate the possible untruth of the data as well. This is not possible in the Poverty Certificate Nr 1 however it transfers the liability to the applicant regarding the trustworthiness of the data included in the certificate.

As for the way of filling them in (by hand or by typewriter) two conclusions can be drawn from them.

From one part, filling in by typewriter was regarded a novelty in the 1920s, and 1930s. Transferring to the typewriter from the previously used handwriting can be considered a veritable „information-technology revolution” in Hungarian administration. (Obviously, it took place in several phases, just like the transfer to electronic registration in the recent past) On the other hand, the hand-completed form could be taken at the home of the applicant, providing opportunity for an exact survey of the life circumstances, which can be excluded in case of using a typewriter.

The applicant’s signature appears on the form Nr. 2 only, while form Nr. 1 (the typewriter-completed version) fails to include it. This raises the rights to inspect the documents, or else the failure of providing these rights. Presumably, (whether they were completed at home or at official premises) both documents are the results of single meetings, which decided whether or not the person was entitled or not at that specific moment.

55/2 szám.
1932

Dombóvár nagyközség előljáróságától.

Hatósági vagyoni bizonyítvány.

(Szegénységi bizonyítvány.)

Gyermektartási par céljára.

Alulírott község előljárósága bizonyítja, hogy ~~.....~~ Szvetozárné sz. ~~.....~~
1931 febr. 15-től a mai lakosnak (Petőfi utca 3 házában), névnek
Dombóvár házban alkalmazott születési helye Tamási
foglalkozása (állása)
Életkora (születési ideje) 1896 vallása r. kath. családi állapota 32v.

a)

Vagyona: 1. ingatlan: Dombóváron vagyontalan
2. ingó: nincsen
Egyenes állami adója: nincsen P f.
..... P f.
..... P f.
..... P f.
Összesen: --- P --- f.

Jövedelme: körülből ~~XX~~ havi ~~XXXXXX~~ teljes ellátás és 32 pengő -- fillér.

b)

Fizetésre köteles hozzátartozói a következők: atyja: ~~.....~~ András napsz. Tamási

Vagyona: 1. ingatlan: Állítólag vagyontalan
2. ingó:
Egyenes állami adójuk: P f.
..... P f.
..... P f.
..... P f.
Összesen évi P f.

Jövedelmük: körülből évi havi, heti, napi napszámkereset pengő fillér.

c)

Fennnevezett köteles (megnevezendők az illető családtaggal) ISTVÁN 11 éves, Katalin 6 éves
Ilona sz. 1932 febr. 26. elintázásról gondoskodni:
ezek közül valóban eltartja: állítólag nevelésükhöz hozzájárul


d)

Dombóváron ~~.....~~ (nincs több jövedelme, mint a lakóhelyén szokásos) a ezidő
teljesen vagyontalan ~~.....~~ (nincs több jövedelme, mint a lakóhelyén szokásos) a ezidő
szerint 2 pengő 40 fillérben megszabott közhatalmas napszám ~~.....~~
~~.....~~

e)

Különös adatok melyek a félnek:

1. Munkabiztosító pénztár tagjára: IGEN
2. Munkaképességére (egészségi állapotára): ----
3. Községi illetőségére vonatkozóan: Tamási
A bizonyítványban foglalt adatokat megállapította a vizsgálóként felelős
alulírt
Kelt Dombóvár 1932 év március hó 7 n.



Picture 1. Typewritten single-page certificate of poverty

Budapest székesfőváros J. kerületének elöljárósága

JUN 20. 1929

A) minta a 72.500/1914. I. M. számú rendelet 5. §-ához

Fővárosi elöljáróság

1929. június 20. 35

Utasítás a kérdőív kitöltésére.

A 6. kérdésre csak a gyermekek számára kell feltüntetni, míg pedig a) alatt azokat, akiknek áltartásáról a kérelmező gondoskodik, b) alatt pedig azokat, akik áltartásáról maguk gondoskodnak.

A 8. kérdésre, ha csak hozzávetőleg is, meg kell jelölni a kérelmező jövedelmét, nem elég annyit mondani, hogy jövedelme bizonytalan. A jövedelmet olyan időszakokra (év, hónap, hét, nap stb.) kell kitüntetni, amely időszakoként a kérelmező jövedelmét hírzo.

A 13. kérdésre a feleletet lehetőleg röviden kell megadni, pl. X. Y. elter pedig havi gyermektartható) iránt indítandó perben.

Szegénységi jog megadásért a bírósági eljárásban előterjesztett kérelem alapjául szolgáló hatósági bizonyítvány.

I. Kérdőív.

1. A kérelmező neve: [REDACTED]

2. Állandó lakó- vagy tartózkodóhelye: *Budapest VI. kerületében, u. 29. 17*

3. Állása vagy foglalkozása: *háztartás vezetője* *1901*

4. Elektora: *24 éves*

5. Családi állása (nős, férjes, nőtlen, hajadon, özvegy, elvált): *háziadós*

6. Gyermekeinek száma: a) gondozás alatt *egy*
b) gondozáson kívül *0*

7. Vagyona: a) ingatlan (a terület és a művelési ág megjelölésével): *nincs*
b) ingó (a háztáuloron kívül): *nincs*

8. Jövedelme: *nincs* *1929. óta* *átta* *névelés*

9. Honnan jözik ez a jövedelm? (részletezve az egyes jövedelemforrások szerint):
monerius szabz. élelmiszer kelt pl.

10. Lakása áll a következő helyiségből: *családi tag*

11. Háztartásban élő hozzátartozói (részletezve a kérelmezőhöz való családi viszonyuk szerint):
Körsímet káros állapotban

A Kér. ellj. szolg. ut. 306/a sz. mintája.

Szegénységügyi hatóságok 1929 — 2007

Picture 2.1. Two-page, hand-completed certificate of poverty

az illeti adózás névmutatójában nem fordul elő.
Budapest, 1929. évi június hó 7. napján

12. Évi egyenes állami adójának összege (részletezve az adóterhelt tárgyakról):
A Magyar Világ Pártjának központi bizottságának elnöke

13. Az ügy, amelyben a bizonyítvány kiadásra kerül (az ellenfélnek, az ügy tárgyának és minőségének megjelölése):
A Magyar Világ Pártjának központi bizottságának elnöke

Budapest, 1929. évi június hó 7. napján.

[Signature]
kötve

II. Fölsorolása azoknak az adatoknak, amelyek alapján a hatóság a kérdőív feleleteinek valóságát vagy valótlanosságát megállapította:
A kérelmező nyilatkozata alapján

[Signature]
hatósági község

III. Bizonyítvány
Bizonyítjuk, hogy *[Signature]*
budapesti lakos, akinek állása (foglalkozása) *[Signature]*
vagyona (ingatlan):
(ingó):
egyesenes állami adót fizet, amely nem elegendő jövedelme, mint a lakhelyén szokásos köznevelési napzat.
Budapest, 1929. évi június hó 7. napján
(P. H.)
[Circular Stamp]

Picture 2.2. Two-page, hand-completed certificate of poverty

Summary: Value and/or worthlessness?

With granting poverty right, in our case, the aim was that mothers giving birth to illegitimate children should not stay away from court because of lack of awareness of their lawful rights, lack of experience in legal matters, and poverty.¹⁹ These reasons are not unknown in the relevant literature. Miklós Kengyel draws attention to the fact that the lack of awareness of one's lawful rights is related to unequal chances.

The legislators attempted to equalize the lack of awareness of legal rights by introducing mandatory legal representation. In case of mandatory legal representation, however, new unequal chances arose due to income inequalities. The legislators, in turn, tried to equalise these new unequal chances by granting poverty rights.²⁰ As it was seen before, a person was exempt from paying legal expenses after getting the certificate of poverty.

Thus, it is difficult to form a judgement regarding certificate of poverty. One can experience ambivalent phenomena when taking a closer look at it.

It represented a value since

- It allowed the poor to initiate court litigations.
- It created equal chances because even the poor got legal representation.
- It provided financial advantages (more precisely, it helped to eliminate financial disadvantages).

It was worthless, because

- It denounced the person who was forced to present such a document.
- It exercised control over the applicant.
- It was not available for those who failed to apply for it (lack of universality)
- As a certificate used at litigations, in case of alimony litigations it limited (albeit only indirectly) the amount of the child support fee.

Taking this background into consideration, giving a final answer for the question posed in the title requires further research, since our incomplete knowledge available at present (complete data are only available regarding alimony litigations) do not allow to give an unequivocal answer.

19 Some further causes for staying away from court, without being exhaustive:

- A) The financial status of the mother or the grandparents are satisfactory, therefore they can afford to resign from the child support by the father. They can bring up the child without „external” help.
- B) The father takes care of the child by giving a monthly allowance to the mother. It is also possible that the parents live together. (During my researches in the archives, I met some cases where after the cease of cohabitation relationship the alimony litigations were initiated against the father.)
- C) The mother was held back from turning to court by her shame. (Similarly to the cases where victims of rape failed to turn to the police because they felt ashamed.)

20 Kengyel 1986. 70-71.

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A SZEGÉNYSÉGI BIZONYÍTVÁNY, MINT ELŐNY ÉS HÁTRÁNY

Varga István

Absztrakt

Magyarországon 1945 előtt ismert jogintézmény a szegénységi bizonyítvány, amely illeték- és perdíj mentességet biztosított a bírósági és hatósági eljárásokban az alacsony jövedelmű és vagyoni helyzetű személyek számára. Erre az volt jogosult, aki számára a községi adminisztráció igazolást állított ki. A „hatósági közeg” (ma ügyintéző) tulajdonképpen egy „kvázi környezettanulmányt” vett fel, melyben a kérelmező életkörülményeit igyekezett feltárni. A szegénységi bizonyítvány tehát egyrészt előnyt jelentett az érintettek részére, hiszen anyagi megtakarítást értek el, illetve hozzájutottak bizonyos szolgáltatásokhoz. Másrészt hátrányt, mert megbélyegezte az érintetteket. A szegénységi bizonyítvány széles körben használatára utal mai napig élő emlékezete, illetve máig tartó megbélyegző jelentése a magyar nyelvben. Kulcsszavak: szegénységi bizonyítvány, igazolás, előny, hátrány, életkörülmények

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ANALYSIS OF THE SOCIAL SERVICE-PLANNING CONCEPT OF THE MULTI-PURPOSE MICRO-REGION ASSOCIATION OF BAJA

ADRIENN R.KISS

Abstract

The present study analyses the Social Service-Planning Concept of the Multi-purpose Micro-Region Association of Baja. The key question is: whether or not the above mentioned social service planning concept contains the necessary contentious elements and to what extent it is suitable for fulfilling the real needs of the relevant municipalities. In the first part of the study the theoretical principles of social planning concept will be briefly reviewed; then the focus will be put on the purpose and target groups of the concept. The second part is a critical analysis of the Social Service-Planning Concept of the Multi-purpose Micro-Region Association of Baja. The main conclusion is that the structure of cooperation between the municipalities must be reconsidered; and on the basis of a comprehensive research it is necessary to determine the most essential areas of intervention.¹

1. The Structure and Principles of the Service-planning Concept

For drafting the analysis I consider it important to provide a brief presentation of the principles of service-planning concept in order to create a fundament for later analysis.

The local government of a settlement with at least two thousand inhabitants shall prepare a service-planning concept in order to determine the service tasks to be rendered for socially disadvantaged people living in the settlement. In case the settlements carry out some of their social duties within the confines of an association the service-planning concept concerned shall be prepared by the association. The content of the service-planning concept is reviewed and updated by the local council or the association every two years.²

The local council of a settlement can carry out their duties by themselves, or, by means of contracting with other organisations or persons, within the confines of an association. The personal provision rendered within the confines of the basic services should preferably be provided at the service provider, i.e. person or institution, found nearest to the residence of the person entitled for the service concerned. When determining the service area of institutions a consideration should be given to the principle that the distance between the institution and the residence of the people treated should preferably not exceed 100 km.³

1 Lector: Dr. Mária Zám PhD

2 Kistérségi módszertan 2005.

3 Bajai Többcélú Kistérségi Társulás Szolgáltatástervezési Konceptió 2007.

It is important that the concept should not only be a document about the renovations, investments and restructuring serving quantitative and quality development, but, it should be realised that, besides their direct service duties, local governments can have conceptional schemes within the confines of their regulatory function. Some tasks of institution level which do not necessarily belong to the scope listed above could be included in a concept (establishing supervisory opportunities, developing quality assurance.)

The concept determines its tasks and directions of development for each level, divided into layers:

- Within the scope of the local government regulatory powers
- At the level of the local government's service obligations
- At institutional level

In order to make the service and care activity of the local governments of the settlements more effective several concepts were made earlier regarding the sub-field of social care.

In formal respect the concept of service-planning can refer to several documents, however, the local government must have a "basic concept" that connects or else "coordinates" the other concepts. The concept shall determine the major professional and economic trends to which the other programs should be connected, besides, the whole structure must make a complete entity where the fitting of the individual elements is achieved. As for the content of the service-planning concept, the basic concept should be meant here where the main content elements are determined by the Social Law.⁴ The concept is valid for an indefinite period of time, however, its content must be reviewed and updated by the local governments concerned every two years.

The structure of service-planning concept

- The principle of the concept
- Situation analysis
- Trends of development at each level of service providing

2. The content, objectives and tasks of a service-planning concept

2.1. Content

The content of the concept includes three elements:

- a.) The element related to the trend of demand for services and the number of people receiving them (population trends, age structure of the population, demand for services).
- b.) The development of the system of institutions, the fulfilments of the tasks*, the situation of the fulfilment of service and care obligations, a schedule for providing the services, the situation of the local fulfilment of special needs according to the individual characteristics of some recipient groups, which are not included in the service and care obligations.

4 Dr. Kovács Zs., Nagy J. 2002.

- c.) As a third element, in connection with providing appropriate conditions for the services, it must include the tasks of service operation, finance and development, and the frameworks of cooperation.⁵

2.2. Objective of the Concept

- a.) To determine the principles, trends and goals which the settlement shall strive to follow and meet while providing and developing social services, and which shall orient the further agents of the development of social services.
- b.) To prepare a basic document of the decision makers which provides a comprehensive picture of the situation of service obligations of the settlement, the social needs and the opportunities available, the trends of service development and the tasks within the scope of regulatory powers of the local government, at the level of service and care obligations and at institutional levels.
- c.) To eliminate the deficiencies which the social service provider system is currently unable to manage in the settlement.
- d.) To facilitate the establishment of new-type institutions introduced by the Social Law (e.g. supportive services, residential homes, etc.).
- e.) To create such a high-quality and differentiated system which puts the individual in the focus of services.
- f.) To establish a harmonic service system at the settlement which operates in a coordinated manner and which covers the social needs completely.

3. Task of the Concept¹

To highlight the shortcomings of the social service and care system operating in the settlement.

- To determine the trends for developing a gap-free social safety net in the settlement.
- To facilitate the establishment of a uniform social service policy.
- To provide information for elaborating and implementing further development concepts, programs and schemes.
- To help the decision makers and the participants of service providing by information, to provide the necessary fundament for the operative programs of social service development.⁶

4. Determining the target areas of the Concept

Determining the target area is a structural element for preparing the service-planning concept which drafts the issues that could offer direct or indirect opportunities for intervention during the development of social services.

⁵ Segédlet 2004. 14.

⁶ Segédlet 2004.

Target areas:

- Local regulations of social services and care
- Operating rules and procedures of the maintainers,
- Institutional regulation.
- Review and development of institutional structures, overview of integration opportunities,
- Development of human and financial resources within the local social services,
- information management, information flow, connections, connection with the potential circle of recipients, connection with the inhabitants, professional and institutional system of connections, cooperation with other sectors,
- Professional and institutional system of conditions,
- quality issues in social services,
- socialization of services and care,
- offering contractual care, services and partial services.⁷

Determining Target Groups:

It refers to the target groups for whom the concept determines priorities. These include the following:

- children
- families
- the elderly, pensioners, single people
- marginalised groups: mothers in crisis situation, homeless people
- special groups (some further differentiation is possible here, e.g. when the number of disabled people is high then the special services to be provided for them).⁸

Vision:

The concept of service should include a vision which should be the starting point of the development that determines the destination intended to be reached. This is such a long-term state representation that could help, first of all, determine the system of targets therefore it creates a basis for preparing the concept. It is none other than a value-based system of the social services development trends which should be enforced during the elaboration of specific objectives and tools.⁹

Offering a vision shall provide an opportunity to consider the indicators that has direct or indirect effect on the social services, and to project the necessary actions resulting from the situation presented.

7 Segédlet 2004. 17-18.

8 Segédlet 2004. 19.

9 Segédlet 2004 14.

Determining the basic principles

After determining the vision, the concept should definitely deal with those principles which are considered fundamentally important and to be followed by both the decision makers and service providers and the recipients during the provision of the services concerned.

These principles include the following:

- the right to a dignified life and its inherent nature
- providing a social minimum for everyone
- providing opportunity for enforcing the social rights
- the man, the individuals and the families should be in the focus
- rejection of any kind of discrimination and prejudice
- emphasising the supportive role of social institutions
- protection of individuals and families, the smooth coexistence of the local society
- open social policy, clarification of the role of local government.

Determining the values

The values prevail in the local social policy and during providing social services:

- social safety
- the social care and services are basically intended to correct the upset social balance
- differentiation
- providing client-friendly care and services.

Analysis of Service-planning Concept

The concept made by the local government of the settlement should match the concepts prepared by the association, the county and metropolitan governments. The concept made by the association should match the concepts prepared by the county and metropolitan governments, besides, in case of multi-purpose micro-region association, the plans and programs providing the coordinated development of the area of the micro region. This has been achieved in the case of the Multi-Purpose Micro-Region Association of Baja.

Social basic services: According to the relevant law, all local governments must provide meal and home help within their respective administrative areas, besides they should provide access to other forms of basic services (especially to family-support services). At the settlements having more than two thousand permanent inhabitants, from the other forms of basic services it is the family-support that must also be provided, while in case of settlements with more than three thousand inhabitants both family-support and day care services must be provided.

The tasks of settlements according to the number of inhabitants are represented in the following table

The task indicators of settlements by the number of inhabitants, according to the Social Law:

Settlement	Number of inhabitants	Providing meals	Home care	Family care	Day care	Supportive service	Home with warning sys	Community basic care	Old-age, temporary	Low-threshold service for addicts	Streetwise social work
Bácsbokod	3,093										
Bácsborsód	1,305										
Bácsszentgyörgy	194										
Baja	37,629										
Bátmonostor	1,704										
Csátalja	1,691										
Csávoly	2,048										
Dávod	2,209										
Dunafalva	1,009										
Érsekcsanád	2,981										
Érsekhalma	693										
Felsőszentiván	2,066										
Gara	2,522										
Hercegszántó	2,260										
Nagybaracska	2,513										
Nemesnádudvar	2,037										
Rém	1,422										
Sükösd	4,097										
Szeremle	1,611										
Vaskút	3,709										
Total:	76,793 people										

Access should be provided

It is mandatory to be provided at the settlement concerned

(Source: Micro-Region Service-planning Concept of Baja, Hungary)

The chart clearly shows that most of the settlements of the micro region, namely 16 out of 20 has less than three thousand inhabitants, and nearly the half of them (8) has a population of less than two thousand (there are three further settlements that exceeds 2,000 inhabitants only by a few people).

The vast majority of the settlements have a population between 1,000 and 3,000, and the most typical is when the number of inhabitants is between 2,000 and 2,500.

The number of inhabitants at the settlements is a very important factor because it turns out from earlier researches that the mandatory basic services are the least developed at the villages with the smallest populations, and these are the settlements where development is most needed. The small settlements, aside from some exceptions, struggle almost the same problems. "Most of them have become the home of aging social which have been detached or excluded from the labour market"¹⁰

The establishment of the concept of micro regions, among others, offers an opportunity to treat these problems as well in the twenty settlements of the association, not to mention the supplementary norms, which facilitates the provision of more complex and higher level services and care.

Recognizing and surveying the real social needs of a given settlement or community is a precondition for all well-grounded social planning. The statistic databases available constitute a very important base for identifying the needs. The local governments still do not know the statistic databases available.¹¹ This could represent two kinds of problems: one of them is that the decision makers cannot exploit the information offered by the data available, or else, they try to get access to the necessary data from their own sources, although they might already be available anyway. Besides, another serious problem can be represented by the fact that the local governments do not know the spatial distribution of the problems of their own settlement, they rather have ideas about them based on rumours, impressions and traditions, therefore, of course, they are unable to identify the relationships of some specific problems, and the overlapping problems of some groups.¹² Unfortunately, none of the settlements within Baja micro region has a social map, thus, it is quite difficult to explore the real needs, due to the reasons mentioned above.

Therefore, in the first part of the Concept, the exploration of the statistic data is realized, which, besides the number of inhabitants of the settlements, describes the distributions according to age, the level of education, the number of people having secondary-school certificate, the population growth trends, the age composition of the population, the economic activity, the needs for services and the data of households related to the entire micro region in a really comprehensive manner. According to the examination of the households in the concept it was concluded that "the role of the family seems to remain strong, and at the planning of the social services, the family, as a natural resource, is an essential element". This is a really welcome statement, so the family appears in the micro-region concept as one of the priorities, at least in my opinion, although it is not expressed this way in the documentation.

The concept compared the data of settlements during their introduction according to two kinds of surveys, from one part according to the database of the county

10 Hodosán 2002.

11 Németh-Kádár 2005. 26.

12 Németh-Kádár 2005 .28.

methodological centre from the other part by taking the database of the Micro-Region Association of Baja into consideration. The difference of the two materials is due to fact that the service rendered for example regarding community services is uneven because of the regulatory anomalies of normative subsidies.

The presentation of the settlements, according to the principles of the concept, includes the services provided according to the needs. The word “needs” might sound a bit strange in this context, because, as I previously highlighted, the establishment of services was not preceded by any needs assessment.

The presentation of settlements is limited to the description of services provided, the number of recipients, the number of children attending kindergarten and school, besides the number of people receiving some specific benefits. There is no word on what other kinds of demands arose, what needs were formulated (even by means of rumours), what developments would be necessary, although they would form the core of the concept.

A short summary follows the presentation of the settlements, according to which the following can be concluded:

The information gained from the different data sources do not match exactly. Several possible reasons could be assumed for this:

1. The surveys took place at different times even if this difference represents a relatively short time interval
2. There were no unified thematics and structure for posing questions, therefore the answers given to them could have different interpretations-according to the intention of the interviewer.
3. The legal regulation of social care and services (including the system of basic and specialised services, and support depending on specific needs) is unpredictable, the changes are not consistent, their trends cannot be predicted, therefore the way of their management is often determined by financing opportunities instead of practical considerations.
4. At some settlements the forms of basic services to be rendered (meals, home care) are not provided
5. There are several settlements that undertake to provide such basic services which are not require by the law.
6. Overall, all this suggest the necessity of establishing an information centre within the micro region which could help the specific settlements utilize their resources more efficiently and improve the quality of their basic services.¹³

At the end of the concept a SWOT analysis is found which, in my opinion, should have been placed to the beginning, since that is part of the examination (diagnosis) and the first process in the course of planning. Creating a concept, determining the objectives is the most important and most critical element¹⁴ during the preparation of the concept.

After the SWOT analysis the individual suggestions can be read in altogether two

13 Bajai Kistérség Szolgáltatástervezési Konceptió 2007.

14 Németh-Kádár 2005. 19.

pages (relating to 20 settlements). The suggestion sets out a three-point strategy how to eliminate the shortcomings. One of the points suggests the ongoing operation of the signalling system, since currently the association does not have correct information regarding the actual utilization of basic services and their operation, since they are adjusted to the eligibility criteria of funding determined in the annual budget act. This results in frequent transformations, merge and separation of activities, which makes the process impossible to be followed. A continuously operated signalling system is capable to predict the changing demands and provides opportunity for adequate response.¹⁵

The second point of the strategy is related to the fact that within the association several service providers fulfil the same professional task with fluctuating capacity. It should be achieved that at least a dialogue would develop between the service providers, which could serve professional improvement by exchange of experience, but it could also lead to a minimal level of interoperability in case of capacity surplus or shortage.¹⁶

In the third point the proposal suggests, that the cooperation structure of the settlements should be reconsidered according to the service-planning concept, or else, in case of the settlements where concepts have not been completed, they should be prepared according to the same series of criteria and data content and should be coordinated with the concept of the micro region. These series of criteria should be applied at those local governments where the review becomes due.

As for the first priority, the concept highlights the fact that, since social security essentially covers the guarantee for providing a minimal livelihood, therefore providing it should be set as a primary objective. Besides, establishing the social security of the inhabitants living in the micro region, or “creating the state leading to it”. The care and services should be accessible for the disadvantaged inhabitants of the region: the disadvantages themselves should be reduced. The local governments could accomplish these tasks only by cooperation, therefore the process aiming at it should be launched, because it will serve the needs of the needy, and will facilitates the organisation of tasks for the settlement.

In order to accomplish the tasks the micro region suggests a comprehensive state survey, as a first task, including the exact survey of the capacity of the existing services and the establishment of the real needs.

Thus, the service-planning concept suggest these priorities in the social service-planning concept of the micro region, the completion of which, in my opinion, should have been preceded by the survey mentioned above, and the concept should have been based on that in the first place.

According to the listing above, quite a lot of elements seem to be missing from the Social Service-Planning Concept of the Multi-Purpose Micro-Region Association of Baja. First of all, the basic principles were left out albeit they should have been clarified in the beginning of the concept, not to mention of the initial hypothesis which fails to appear in the whole concept, although the strategic plan should have been based on it.

15 Bajai Kistérség Szolgáltatástervezési Konceptió 2007.

16 Bajai Kistérség Szolgáltatástervezési Konceptió 2007.

The use of social services is missing from the table showing the demand for services. It included the use of pre-school places, school data (a number of students per class), a number of children per teacher, a number of inhabitants per general practitioner, but as for social services it fails to contain any data. (I must note here, that, since none of the local governments has a social map in the micro region, therefore they have no real picture of the real needs within the communities, so it would be difficult to form hypotheses).

The second phase has also been completely left out from the concept, the external factors affecting the development of the system of areas have not been explored at all. Only some statistic data related to the micro region have been presented in the topics detailed before (age composition, employment, etc.), which perhaps provides some fundament for the third phase.

Regarding the third phase I can say that, basically, it could not be found in the concept, the mapping of the internal potentials takes place in a sense, that a SWOT analysis has been prepared, besides the concept presents the statistic data of twenty settlements including the data of the recipients. However, it also fails to contain any data regarding the internal resources of some specific settlements, and there is not a single place where the diagnosis is formulated.

As for the fourth phase, it could be said that some strategy or vision is described, which I have mentioned earlier (page 9.), however, these are far from being comprehensive plans, rather they are proposals related to the cooperation of the local governments and the service providers of the settlements.

The fifth and sixth phases, i.e. the elaboration of the objectives and the planning of how to build the future, do not appear in the concept either. In order these phases could be realised a comprehensive survey is needed in the micro region, which should be implemented according to the aforementioned six phases, and the tasks detailed in each phase could be assigned to them. Until this survey is done, the concept could be considered not very well-conceived and unfounded, where the preparatory works providing the fundament are missing. While the main objective is guarantying the minimal livelihood development in the social segment cannot be really expected in this region.

As it has been expressed at the end of the concept: „In the first step a comprehensive survey must be conducted, including the exact assessment of the capacity of the present services and the establishment of the real needs”! The completion of a “real” concept could be based on that!

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A BAJAI TÖBBCÉLÚ KISTÉRSÉGI TÁRSULÁS
SZOLGÁLTATÁSTERVEZÉSI KONCEPCIÓJÁNAK ELEMZÉSE

Adrienn R. Kiss

Absztrakt

Jelen tanulmány a Bajai Többcélú Kistérségi Társulás Szociális Szolgáltatástervezési Koncepciójának elemzésére vállalkozik. Arra keresi a választ, hogy a szóban forgó koncepció mennyire tartalmazza vagy nélkülözi a szükséges tartalmi elemeket, és milyen mértékben áll készen a települések valós szükségleteinek kielégítésére.

A tanulmány első részében röviden áttekintésre kerülnek a szolgáltatástervezési koncepció elméleti alapjai, majd rávilágít arra, hogy melyek a koncepció feladatai és célcsoportjai. A tanulmány második részében a szerző kritikai megállapításokat fogalmaz meg a Bajai Többcélú Kistérségi Társulás Szociális Szolgáltatástervezési Koncepciójára vonatkozóan. Megállapítja, hogy a szolgáltatástervezési koncepció alapján a települések együttműködési struktúráját újra kell gondolni, és egy átfogó kutatás tükrében kell kijelölni a legmeghatározóbb fontosságú beavatkozási területeket.

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THE RURAL HUNGARY

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Abstract

The study analyses the role of – the two so-called collective factors – spatiality and ethnicity in social exclusion in Hungary. Furthermore it highlights the unfavourable effects of wrong political decisions concerning regional development on rural poverty and exclusion in Hungary's history since the end of World War II. It suggests the need for a new practice of monitoring and focused reporting on micro-regional level, a tight cooperation of regional development and social policy actors in regional planning, as well as a definite commitment of local decision makers in order to reduce spatial inequalities and avoid further escalation of exclusion.¹

Keywords: social exclusion, rural poverty, collective factors, ethnicity, spatiality, peripherisation, cohesion policy, cooperation, monitoring

Researchers striving to commit to paper something about poverty and social exclusion in rural areas face a true challenge. A major obstacle for comprehending and tackling these issues is the lack of an underlying single order of definitions and indicators.

Readers thumbing through “Combating Poverty and Social Exclusion in Rural Areas”, the most recent EU document on this topic, will soon realise that, in it, equal length has been devoted to arguments urging more efficient intervention measures and a remedy to this situation, and to information that offers an insight into the characteristics of poverty in rural areas in the EU. Of course, we are not suggesting that no research worthy of mention has been conducted to explore social exclusion and poverty in rural areas over the last decades in Europe; nevertheless, some fundamental issues are still on the to-do list, which suggests serious shortcomings. Although I should like to resist the temptation to play the populist card, we should remember that underlying our fudgy terms, definitions and indicators are flesh-and-blood people, and nearly 80 million of them live in poverty in the 27 member states of the European Union, with an overwhelming majority in rural areas. This is one of the reasons why a clarification of methodological issues is so pressing today.

Naturally, the shortcomings mentioned in my first few sentences do not turn our ambitions into a Mission Impossible; there is no denying that they limit the truth

1 Lector: Prof. Dr. Irén Sz. Kukorelly DSc

and validity of our study. In the light of the above, all that is left for us to say is that in addressing social exclusion and poverty in rural areas of Hungary, and in using the relevant definitions we will accept the tenet put forward by Littlewood and Herkommer,² the essence of which says that poverty and social exclusions are concepts for which there is no professional consensus, and which are used to mean a number of things. Accordingly, we will use the terms ‘social exclusion’ and ‘poverty’ as synonyms here.

1. The role of spatiality and ethnicity, the two collective factors, in social exclusion in Hungary

Since the political changeover, numerous studies have confirmed that the overwhelming majority of social and economic disadvantages emerge in a spatial context, the underlying reason for which is that space- as a dimension vested with special characteristics- is capable of creating favourable and unfavourable situations by itself. The spatial units- where the economy is underdeveloped, where the unemployment rate is high and the cultural and ethnic differences of the population relative to social mainstreams are significant-, are areas ripe for social exclusion. These phenomena are the most common in diverging disadvantaged areas³. Nowhere else in Europe is the combined effect of these two factors so strong as in Hungary. History and political mistakes are both to be blamed.

In the following section we will provide an overview of the impact of these two general factors,⁴ i.e. spatiality and ethnicity, on trends in poverty.

2. The role of spatial inequalities in social exclusion

The trend in social development after World War II – which was the hardest to rectify – was the excessive amplification of the spatial inequalities that had developed over the centuries⁵. Before, however, going on to provide an overview of the major milestones during the period from the beginning of World War II to the present, we will provide a brief summary of the stages leading to the evolution of the country’s internal and external peripheries, because this is how we can understand how the mistakes of spatial policy in the past 65 years have aggravated an already disadvantaged situation. We will use the example of the Great Plain to illustrate the evolution of the peripheries in Hungary, as it is here that expanses of rural small regions exhibiting the characteristics of periphery are the largest⁶.

2 Littlewood 1999.

3 Faluvégi 2004.

4 Szalai 2002.

5 Szalai 2002.

6 Jász 2006.

A key event in the history of the evolution of peripheries along the border was the 1921 Trianon Treaty that concluded World War I, which reduced the territory of Hungary to one-third of its original size. In the wake of the finalisation of the new borders, what had been left from the truncated counties started to develop into a backward rural zone that began mainly along the Northern and Eastern borders. After the Trianon Pact, the Great Plain was shorn of half of its original territory, as a result of which market towns, crucial to agrarian production and the sale of the products, now lay outside Hungary. So were manufacturing units representing the beginnings of industrial production. We think that, in addition to the above, regarding the spatial aspects of social exclusion, the political decision after World War I had another outcome, one that still resonates and was a fatal blow to the accessibility of the region. Trianon also stripped border regions in the Great Plain of their transport infrastructure, as a result of which the railroad ring now lay outside Hungary, and networks with central places as their destination were bisected by the newly designated borders.

In summary, the evolution of the peripheries was attributable to two main factors:

- the first was that the centres of the regions concerned were now outside Hungary,
- the second was that these areas, which used to be deep inside the pre-Trianon Hungary, were now border areas along the newly defined borders.

It was, therefore, no coincidence that these regions had difficulty in re-defining themselves in the economy and their integration into the regional division of labour was also fraught with difficulties.⁷

We shall now go on to outline, in a breakdown by eras, the ‘contribution’ made by economic and spatial planning policy in Hungary to the highly polarised development experienced over the past 60 years or so.

Relying on a paper by Nemes Nagy József⁸ and Dövényi Zoltán⁹ we will expand our perspective in order to study spatial processes from the end of World War II to the present.

The Hungarian adoption of the Soviet model (1948-1968)

A key characteristic of this era was that the industrialisation of rural areas functioned as spatial development, which was practically non-existent, even as an incidental or minor policy. Economic priority no. 1 was the quantitative increase in the production of goods, where the development of heavy industry took precedence. Little emphasis was placed on the development of infrastructure, key to the development of settlements and the quality of life of their residents; the only progress made was rural electrification (the electrification of villages). Alongside this, forced industrialisation and the collectivisation of agriculture led to significant internal migration from rural areas to Budapest and the centres of heavy industry. This process adversely affected

7 Jász 2006.

8 Nemes Nagy 2003.

9 Dövényi 2003.

demographic composition, especially that of villages, as well as the social structure of towns/cities as destinations of migration.

The Hungarian Model (1968-82)

During this period as an outcome of the investments, though slowly, some equalisation of household incomes started to materialise at the regional level. However, by the mid-70's the funds earmarked for extensive development had slowed to a trickle, which precipitated a serious peripherisation in the settlement network, which mainly manifested itself at the small regional level. Two of the underlying reasons for this were the establishment of town-plus-district units and the closing of railway lines handling low traffic volumes.

Overall, the era can be characterised by strong differentiation at the regional and settlement levels against a backdrop of equalisation trends at the large regional level.

The crisis of the system (1982-89)

The scarcity of development funds had become even more conspicuous by the 1980's; however, the effects of it across the country were still uneven. The lack of funds hit those areas the hardest where the local economy had depended on a single industry. This is when depressed regions, key to the understanding of social exclusion, began to emerge.

Large companies were still key economic factors in this era. They responded to the problems that the recession had brought to the surface by shifting the burden of their crisis onto peripheries through various measures. One such common measure was the closing-down of their premises in the provinces, often in regions where they were the only major employer. The other was the laying-off of commuting employees mainly from regions on the outer and inner peripheries.

Relying on a parliament decree in 1985, the government set as an objective the convergence of the regions that had, by that time, been identified as unequivocally disadvantaged. However, due to lack of time and the necessary development funds, this convergence failed to materialise.

Spatial processes after the political changeover

The relative social equality, an outcome of the policy of an equality drive in the socialist era, soon disappeared due to the dramatic changes that came after the 1990's, with inequality between the upper ten percent of the population and those at the very bottom of the social ladder assuming unprecedented proportions. Poverty had become a factor capable of shaping settlements.¹⁰ Nearly 1.5 million jobs were cut across the country, which was the primary cause of a dramatic increase in short-term poverty.

The period that has passed since the political changeover is not a consistent whole:

10 Dövényi 2003.

the first half was a time of decline and crisis, while the second that of equalisation and consolidation as dominant processes for the entire society. Unfortunately, Hungary is likely to face the social problems of the early 1990's again, due to the decline that started in 2006 and has been amplified by the global crisis. We have never had reasons for optimism as regards spatial processes, as processes ensuring permanent spatial equalisation have never been set into motion.

Owing to the large spatial discrepancies of development, we are now witnessing the appearance of a new generation of social problems. Quite clearly, a settlement's development potential now depends on its geographical location.¹¹

So far we have described the policy to be blamed for inequalities, which is a source of spatial disadvantages and one of the factors responsible for social exclusion. Next, we shall analyse ethnicity from the perspective of the role it has played in the emergence of what is known as a multiply disadvantaged situation. Those in an underclass are undoubtedly excluded socially; however, exclusion today is completely different from what it used to be.¹² Ethnicity is not a factor leading to social exclusion for the social groups which are poor along one dimension only, or whose problems are temporary and mainly of an economic nature. The major difference between these social groups and the Roma underclass is that in the case of the latter there is a line of demarcation of ethnic origin between it and mainstream society.

A comparative study by János Ladányi and Iván Szelényi of the Roma people in Central and Southern Europe¹³ reveals that the line of demarcation between it and mainstream society is the sharpest in Hungary.

In the following we will attempt to provide an overview of the background to the evolution of the Roma underclass in Hungary. The retrospective review covers a period from after World War II to the present, because these are the very decades that precipitated events and unexpected twists in them that are to be blamed most for the social exclusion of the majority of the Roma in Hungary.

The emergence of the underclass and, within that, ethnicity and the unequal spatial development outlined above are closely interrelated. The decline of the areas with small-size villages, a target area for the underclass started with collectivisation, which led to agricultural production taking an increasingly low profile.

This process was further accelerated by a settlement and spatial development policy prioritising the development of raw material intensive industries and, hence, centres of heavy industry, the capital city and county seats. The above processes, generating significant outbound migration in the 1960's and 1970's, contributed, to a large extent, to the current demographic losses of areas mostly with small-size villages. However, the chief ideologists of the political regime failed to foresee that real estate, which had thus lost its true value, and was now available for a song, was to turn areas mostly with small-size villages and inner peripheries into target

11 Dövényi 2003.

12 Ladányi-Szelényi 2004.

13 Ladányi-Szelényi 2004.

areas for (destinations of) inbound migration. A loss of function of these places due to the establishment of town-plus-district units prompted professionals to flee. As a result, the aging 'old poor' unable to sell their real estate, the arriving Romas with multiple disadvantages and a non-Roma underclass made up the majority of the population in micro- and small villages. Thus, some truncated society was left behind, with no model groups facilitating the integration of those falling behind.¹⁴ The majority of the Romas settling down in micro- and small villages used to live in Roma shantytowns.

Though in the 1970's the government made serious efforts to demolish the shanty towns, the result was a curate's egg. Nor was the 'Cs Housing Project'¹⁵ able to improve the living standards of the Roma, because houses came with a small floor area and were of inferior quality. There were often serious clashes as well between the local population and the newcomers (i.e. the Roma and other disadvantaged social groups) intending to settle down, which took an increasingly extreme form after the political changeover.

Researchers seem to agree that the policy of assimilation in the pre-regime change era also brought about favourable changes in the daily life of the Roma and narrowed the gap between the Roma and the non-Roma. It was in the era of state socialism that Roma children started to go to school regularly. However, we should hasten to add that they were often referred to remedial schools or all-Roma classes. Another achievement of the era was 80% male and 60% female employment among the Roma, enabling them to embark on a path of modernisation and civilisation.¹⁶

The integration of the Roma into mainstream society has, however, proved temporary, and a number of unfavourable trends that appeared after the political changeover have turned out to have their roots in state socialism. Forced assimilation had further long-term consequences, in addition to ones presented above: it interfered with and eroded traditional Roma relations. Therefore, those who could not adjust to the prevailing status quo or secure a firm place in the society of the time were destined to slip into the underclass.¹⁷ The political changeover interfered with this process, which, though riddled with contradictions and anomalies, resulted in some convergence. This interference drove a huge number of the Roma to isolated micro-villages and urban slums. Micro- and small villages were unable to deal with the shock of social restructuring, with their residents becoming unemployed on a massive scale¹⁸ Based on the changes since and their consequences, it is safe to say that the biggest losers of the political changeover in Hungary are the Roma.

Naturally, the switch to the market economy did not affect all Roma groups in the same way; middle-class Romas were able to capitalise on the advantages offered by the new circumstances. Some gentrification seems to have started among them as well, with a middle class emerging; however, the distance, both literally and figuratively, between

14 Ladányi-Szelényi 2004.

15 Here the Hungarian 'Cs' stands for low or reduced quality.

16 Ferge 2002.

17 Ladányi-Szelényi 2002.

18 Szalai 2002.

the Roma capable of catching up with mainstream society and members of the underclass is becoming increasingly great. Today one of the most difficult problems of an ethnic nature is that a large majority of the Hungarian population- according to researchers around 30%- perceive the Roma as unwanted and regard them as scapegoats. This is a major change compared with an earlier, pre-regime change situation where, despite their problems and poverty, the Roma were considered to be part of the local labour force, and there was demand on the part of the majority for Roma labour. The fact that since 1990 entire settlements have become Roma ghettos has resulted in the Romas almost completely losing touch with mainstream society, and the emergence of the lopsided local societies, which we discussed earlier in a paper¹⁹. In order for segregation of this kind to be managed, further so-called active social policy measures, such as the social land project, aimed at the social and labour market integration of the Hungarian Roma should be taken.²⁰ Unfortunately, we are witnessing exactly the opposite in Hungary right now.

Today only a quarter of the Hungarian Roma is not excluded from some perspective or other. Nearly 25% are subject to residential, labour market or educational exclusion. Close to a quarter have been undergoing gentrification. 40% of the Hungarian Roma belong to the underclass discussed in a paper.²¹ They are threatened by both poverty and permanent social exclusion passed down from father to son. Their chances of integration into mainstream society are slim. What makes recovery from the current situation especially difficult for them is the loss of skills and connections.

3. The different facets of social exclusion in the seven regions of Hungary

Before 2004, the fact that consistent and regularly provided regional data needed for the analysis of exclusion and its consequences, and for measures aimed at integration were unavailable rendered addressing the exclusion issue in Hungary difficult. Things changed when a consistent study aimed at exploring the characteristics of the social welfare system was started by the National Institute for Family and Social Policy. The study was carried out in co-operation with regional resource centres and the involvement of regional experts with my participation in North Great Plain region. In the course of the study we relied on questionnaire surveys, statistical data collection and in-depth interviews in order to identify the regional characteristics of social exclusion and substantiate our hypothesis that differences in the social and economic characteristics of the Hungarian regions accentuate different aspects of this phenomenon. In the following section we will summarise the findings of this study.

Due to lack of space, we will just confine ourselves to providing a list of the special

19 Ladányi-Szelényi 2004.

20 Jász-Szoboszlai 2005.

21 Jász-Szoboszlai 2005.

characteristics of the Hungarian regions in terms of social exclusion, arguing that interventions with a different focus are perfectly justified owing to them having such differing characteristics.²²

- Southern Great Plain Region (Dél-Alföld): social exclusion mainly affects aging residents living alone in regions with scattered farmsteads and in border regions; multiple disadvantages are primarily due to difficult geographical access and a scarcity of public utilities; a significantly high proportion of persons with addiction and mental disorders, with a marked presence of various forms of deviance.
- Central Hungarian Region (Közép-Magyarország): phenomena arising from unaddressed social problems, homelessness in particular, are concentrated here; as a result, certain zones are undergoing ghettoisation; furthermore, the indigenous poor who live in dynamically developing settlements and receive practically no social support continue to pose a real challenge to the social welfare system.
- Southern Transdanubia Region (Dél-Dunántúl): a settlement structure where small villages are dominant, the isolation, in both relative and absolute terms, of townships and the overrepresentation of the Roma population in some regions²³ have all contributed to the current peripheral status of the region; a low level of schooling and the region's peripheral status from the perspective of accessibility reinforce each other.
- Northern Hungarian Region (Észak-Magyarország): child poverty is the most serious problem facing the region; the presence of ethnicity-based segregation is also strong; the social welfare system available to local residents is run by persons working either part-time or on their own.
- Central Transdanubia Region (Közép-Dunántúl): one of the Hungarian regions where a favourable economic and employment situation does not improve social chances evenly, i.e. an economically advantageous situation does not automatically translate into social advantages for disadvantaged groups; the proportion of the indigenous poor with a low level of schooling and living a long way from zones of development is also high here.
- Western Transdanubia Region (Nyugat-Dunántúl): residents in problem regions hidden behind macro-data often remain 'invisible' for a social welfare system that has not been properly developed; compared to the national average, the cost of living is very high in the region; as a result, the proportion hit by expenditure and consumption poverty is increasingly high.
- North Great Plain Region (Észak-Alföld): It is here that the number and the size of the areas that are the worst hit by social exclusion are the largest. Of the factors giving rise to the emergence of social exclusion, here in Hungary spatial disadvantages and ethnicity are the most important.

²² Documents serving as sources of summary: shortened working versions of regional analyses.

²³ This paper uses the terms 'Gypsy' and 'Roma'. The official designation of the ethnic minority group is 'Gypsy', while daily parlance uses the more presentable and politically more correct 'Roma'. The word 'Roma' originates from the word 'rom' meaning 'man' in the Lovari language. As, from among the Roma ethnic groups living in Hungary, the Beás group does not speak Lovári, many of them prefer to use the word 'Gypsy'. The same applies to some Romungros as well. Both terms are used in today's academic and public parlance alike.

4. A few recent measures to mitigate spatial disadvantages

Although since the political changeover Hungary's successive governments have all acknowledged the need for mitigating spatial differences, in practice, spatial development has been a failure. A major development in the management of spatial inequalities occurred in 2007, when the government, relying on statistical data revealing differences in the level of development, identified the 33 most disadvantaged micro regions, home to 1 million people, in Hungary. (At the same time, 14 disadvantaged micro regions were also identified.)

After the small regions had been identified, a series of programmes entitled 'We will not give up on anybody!' were launched. They were complex flagship projects aimed at invigorating the local economy, boosting employment and social and geographical mobility facilitated in the 33 most disadvantaged micro regions. In order that the micro regions most blighted by social and economic problems can have access to the earmarked funds of the European Union, taking into account a shortage of professionals and experts, the government provides programming support for local communities enabling them to reach the most successful possible tendering activity.

There were also centrally launched programmes aimed at improving employment in micro regions. One such programme in adult education was the 'One Step Forward' programme or the 'START' card facilitating employment, and tailor-made for these regions was the 'START REGION' card.

As well as the Roma, children are the biggest victims of poverty in rural areas. Today, one in four children is poor in Hungary. In order to lessen child poverty, a programme entitled 'Combating Child Poverty National Programme' was worked out. The objective of the programme is to reduce poverty rate among children and their families significantly in Hungary, whereby children's perspectives can be incorporated in such a way that the impact of multiple factors is reduced. The priorities of the programme also include substantially mitigating the extreme forms of exclusion, segregation and deep poverty. Based on the programme, the 'Let's Make It Better For Children National Strategy' was worked out in 2007 and approved by the Hungarian Parliament the same year. The strategy sets an example in underscoring the importance of the need for a complex approach and complex services as the only way in which exclusion can be tackled effectively. Currently, in order for the feasibility of the above to be assessed, a pilot project is currently under way in the Szécsény micro region of Nógrád County in North Hungary Region.

Dovetailed to the strategy and based on UK models, the 'Safe Start' programmes are also expected to help reduce the social exclusion of children aged 0 to 5 year(s) and their parents in the economically most challenged micro regions.

A brief look at trends in poverty in rural areas reveals that in Hungary, too, the need for intervention measures is the most pressing issue in the area of education and job creation.

As regards the social welfare system that is intended to tackle poverty and exclusion, the impact of the settlement slope can be felt in Hungary. Although, from a statistical-data perspective, the service coverage ratio does not look at all bad in respect of primary social care in the most disadvantaged regions, due, in part, to the fact that care is provided

by multi-objective partnerships introduced in 2004, our studies (Jász, 2006) provides evidence that the figures gloss over serious problems. The workload on social workers is often enormous; they also often burn out, and services are often provided by one person. The less developed a region that we studied was, the more acutely this phenomenon was felt. Local representatives of the social welfare sector hardly have any say in the planning processes that influence local social policy; fatigue, caused by too much bureaucracy, rules out the provision of efficient mental support for those excluded in most cases.

There is no regular co-operation worthy of mention between the staff of the networks established by various ministries, intended to facilitate local developments and linked to rural and spatial development in areas where the most important task is to establish a network for those affected by exclusion and to find persons who can inspire communities. In order for unemployment to be tackled more effectively, the provision of integrated services launched in 2007, afterwards abandoned, should be re-launched. This would require regular co-operation between the actors in charge of labour affairs and those of the social sector, primarily concerning permanent unemployment leading to exclusion. This is underpinned by the fact that the rate of those permanently unemployed among the unemployed is the highest (48%) in Hungary. There has been a dramatic increase in the proportion of young career starters whose parents do not work in the primary labour market.

Unfortunately, no encouraging news of the above integration programmes has surfaced yet; it should be added, though, that some analyses have yet to be conducted on the results of the various experiments/surveys. My personal experience is that the poor political decisions of the past decades, described above, have led to such a loss of trust and such a degree of indifference among those living on the peripheries that not even the current (now better) access to funds can tackle apathy and indifference in the most disadvantaged regions. Despite the objectives that could easily justify the launch of convergence programmes, no local programming or developing groups capable of working together in the long term have emerged yet. Instead, mostly external experts (for the want of internal ones, due to the outbound migration of the professional classes) do some ad hoc brainstorming. Unfortunately, most existing visions lack a complex approach and innovation – a trend since the 1st National Development Plan 2004-2006. In order to change this situation, a change in attitude and social support would be required, the chances of which seem, alas, rather slim.

In order to tackle poverty and social exclusion in rural areas, cohesion policy that also includes development policy should – as the Barca Report published a few months ago suggests- be based on new foundations in Europe as well. Unless social exclusion is treated as a priority – the pre-conditions of which is the earliest possible working out of the relevant definitions and the necessary indicators – differences in living standards will continue to grow in both Hungary and other EU member states. The latter trend suggests a much more unfavourable trend than what the GDP picture of regional differences does.

An attempt to conclude impact of two collective factors, regionalism and ethnicity on occurrence of people's disadvantages living in rural areas have been made before. Carry out of focused status reports on micro level is obviously reasonable in Hungary compared to other EU member states, in order to ensure a solid base for implementation of regionally

different cohesion programs. Regional aspect should be involved each policies playing dominant role in mitigation of poverty and exclusion, such as education, employment, healthcare and social policy. Considering the latter one, it is justified that Method of Open Coordination is a useful, but not a sufficient mean for moderating of exclusion. Purely adapting foreign models as well as executing regional development policies neglect regional and ethnic diversity, reduction of disadvantages of rural inhabitants stays unreachable. Added to the above mentioned prerequisites, a real monitoring approach assisting project fulfilment, a tight cooperation of regional development and social policy actors in regional planning, as well as a definite commitment of local decision makers are needed for avoiding further escalation of exclusion.

Partly due to lack of professionals' competence, assistance networks operate wastefully and with low efficiency. Education of regional dimension and ethnic specialties should be more emphasised in pedagogical curricula of institutions engaged in professional training for assistants in order to eliminate inadequacies.

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SZEGÉNYSÉG A VIDÉKI MAGYARORSZÁGON

Jász Krisztina

Absztrakt

A tanulmány, fókuszában a két úgynevezett kollektív tényező – a területiség és az etnicitás – magyarországi társadalmi kirekesztődési folyamatokra gyakorolt hatása áll. Rámutat továbbá a kedvezőtlen regionális politikai döntések vidéki szegénység alakulásában játszott szerepére, különös tekintettel a II. világháborútól napjainkig terjedő időszakra. A vidéki szegénység hatékonyabb kezelése érdekében kiemeli a monitoring terén alkalmazott módszerek javításának és a szociális ágazat valamint a regionális politika szereplői közötti területi tervezési gyakorlat módosításának fontosságát. A jelenlegi tendenciák tükrében, – a szerző szerint – a szegénység, kirekesztődés kezelése érdekében elengedhetetlen a helyi döntéshozók téma iránti elköteleződésének mélyítése is.

Kulcsszavak: társadalmi kirekesztődés, vidéki szegénység, kollektív tényezők, etnicitás, területiség, periferizálódás, kohéziós politika, együttműködés, monitoring.

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