



# FORUM OF FOREIGN LANGUAGES, POLITOLOGY, AND INTERNATIONAL RELATIONS

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# FÓRUM CUDZÍCH JAZYKOV, POLITOLÓGIE, A MEDZINÁRODNÝCH VZŤAHOV

# FORUM OF FOREIGN LANGUAGES, POLITOLOGY, AND INTERNATIONAL RELATIONS

**Medzinárodný  
elektronický časopis  
zameraný na cudzie jazyky,  
politológiu a medzinárodné vzťahy**

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**Fórum cudzích jazykov, politológie a medzinárodných vzťahov** je recenzovaný vedecký časopis vydávaný na CD nosičoch Vysokou školou Danubius. Bol založený v roku 2009 ako Fórum cudzích jazykov ako recenzované neimpaktované periodikum. Od roku 2017 je rozšírený o novú sekciu politológie a medzinárodných vzťahov.

Časopis si kladie za cieľ byť otvorenou platformou pre uverejňovanie inovatívnych výsledkov z teoretického, aplikovaného a empirického výskumu zo širokej oblasti lingvistiky, politológie a medzinárodných vzťahov, výmeny názorov, skúseností a získaných nových poznatkov a tvorivej práce prispievateľov zo SR a zo zahraničia. Je určený predovšetkým akademickým pracovníkom univerzitných i neuniverzitných vysokých škôl a vedeckých ústavov.

Časopis vychádza dvakrát ročne a vydáva štúdie, odborné príspevky, diskusné príspevky a recenzie, pričom je rozdelený do dvoch sekcií a to na lingvistiku a oblasť politológie a medzinárodných vzťahov. Prispievatelia sekcie lingvistiky môžu svoje publikácie písať v anglickom i v inom svetovom jazyku a prispievatelia v sekcii politológia a medzinárodné vzťahy v anglickom jazyku.

Časopis vychádza dvakrát ročne, uzávierky čísel sú k 31. máju a k 30. novembru.

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The journal aims to be open platform for publishing the innovative results based on theoretical, applied and empirical research in the fields of linguistics, politology and international relations. Sharing the research results and experience of Slovak and foreign contributors are in the focus of the journal editors. The scope of target spreads to academics active in tertiary education and research institutes.

The journal is published twice a year and it published studies, academic articles and polemical articles, and reviews. It is divided into two sections: Linguistics and the field of politology and international relations. Language of the publication is English or other for linguistics and English for politology and international relations.

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Vážení čitatelia,

po ôsmych rokoch existencie časopisu **Fórum cudzích jazykov** (vznikol v roku 2009) nastal čas na zmenu. Nový ročník otvárame nie len zmenou názvu časopisu, ale aj rozšírením o novú sekciu.

Dovoľte mi, aby som Vás niekoľkými slovami oboznámila s novým zameraním časopisu VŠD pod názvom **Fórum cudzích jazykov, politológie a medzinárodných vzťahov**. Publikuje štúdie, odborné príspevky, diskusné príspevky a recenzie. Ide o vedecký recenzovaný časopis, ktorý je zaradený do zoznamu publikácií ERIH Plus. (**European Reference Index for the Humanities**)

Prvá sekcia - **lingvistika** - bude tak ako aj doposiaľ venovaná potrebám a výsledkom výskumu v oblasti jazykovedy, didaktiky, svetovej literatúry a jazykového vzdelávania. Naším prvoradým cieľom je, aby časopis dosiahol vysokú odbornú a metodickú úroveň a zároveň sa stal i užitočným pomocníkom pre všetkých tých, ktorí sa podieľajú na výučbe cudzieho jazyka.

Druhá sekcia - **politológia a medzinárodné vzťahy** - sa bude zameriavať na vedecké a odborné príspevky, štúdie, recenzie a informácie o dianí v politologickej obci. Tematicky zahŕňa oblasti politickej filozofie a teórie, komparatívnu politológiu, politickú sociológiu, analýzy policy, európskych štúdií, medzinárodných vzťahov, či bezpečnostných štúdií

Verím, že Vás zameranie nášho časopisu osloví, že Vás nami predkladané výsledky poznania a výsledky výskumu zaujmú a že postupne sa rozšíri okruh čitateľov a aj prispievateľov.

**doc. PaedDr. Alica Hrajová, PhD.**  
prorektorka VŠD  
šéfredaktorka časopisu

## Editorial

Dear colleagues and readers,

The time for change has come after the eight years the **Forum of Foreign Languages** exists (the journal was established in 2009). New volume will introduce the journal with a new title and new section.

Let me introduce the new title of the journal **Forum of Foreign Languages, Politology and International Relations**. The journal publishes research, scholarly articles, discussions and reviews. The platform is based on peer to peer reviews. We seek to have the journal included into the list of publications ERIH Plus (**European Reference Index for the Humanities**).

The first section - **linguistics** - will continue to publish the research in the fields of linguistics, world, literature and language education. It aims to be both research platform and offer the support for those who are active in language education.

The second section - **politology and international relations** - will focus on research, discussions, reviews, and information in the field of politology. It aims to publish the papers on political philosophy and theory, comparative politology, political sociology, policy analysis, European studies, international relations, and security studies.

I believe the new focus of the journal will be interesting to the scholarly public and we can together improve the knowledge on the mentioned topics.

**Doc. PaedDr. Alica Harajová, PhD.**  
Vice-rector Danubius University  
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## **I. LINGUISTIC SECTION**

# SOURCES OF TERMINOLOGY OF THE EUROPEAN UNION

IVANA KAPRÁLIKOVÁ

## **Abstract**

*The paper seeks to contribute to the issues of English language lexicology focusing on current available sources of terminology of the supranational EU community. Numerous guidelines provide specific information to anyone who deals with legal and administrative terminology and does or intends to do terminology work in this domain. Most of them are written for terminologists and terminology managers, also for translators, interpreters, legal experts, drafters, standardisers and end users who are involved in terminology workflows. These can be useful for private and public administrators, especially in multilingual settings, as well as for IT staff at the service of terminology work and for students (e. g. of translations studies). Taking into consideration the fact that creation of numerous new lexical units or the usage of original ones with different meaning within the EU bureaucracy is, in many cases, unpredictable and very dynamic process, various analyses revealed that EU texts in many official languages have their characteristic syntax, lexis, terminology, and particular style (Born & Schütte, 1995; Dróth, 2000; Fischer, 2006, 2007; Károly, 2007; Klaudy, 2001; Pym, 1993; Pym, 2000, Schäffner & Adab, 2001a, 2001b).*

## **Key words**

*EU English, EU documents, terminology, language resources*

**JEL classification: I 23, I 28**

## **1 Introduction**

„The English language is incontestably becoming the lingua franca in Europe (as in most parts of the world) due, in part, to the ever growing importance of the European Union (EU) in the life of Europeans and European countries.“ (Trebits, p.38). EU English or EuroEnglish is a subject to constant change. We use the term EU English to refer to English language as it is used in the documents of the EU, also interchangeable with the term Euro-English. It is vital to clear up possible misconception of this specific term. In our paper we analyse EU English *sensu stricto* (Jedrzejovska, 2008), i.e. the language used by politicians, jurists or staff working for the EU institutions including legislative texts. On the other hand, the term Euro-English is more broadly considered *sensu largo* (Jedrzejovska, 2008), i.e. English used by non-native speakers across European continent. “Generally, over the years, the European institutions have developed a vocabulary that differs from that of any recognized form of English“ (A Brief List of Misused English Terms in EU Publications, p.3). According to the authors of A Brief List of Misused English Terms in EU Publications, it includes words that do not exist or are relatively unknown to native English speakers outside the EU institutions and often even to stand-

ard spellcheckers/grammar checkers (planification, to precise or telematics for example) and words that are used with a meaning, often derived from other languages, that is not usually found in English dictionaries (coherent being a case in point). Some words are used with more or less the correct meaning, but in contexts where they would not be used by native speakers (homogenise, actor for example). Finally, there is a group of words, many relating to modern technology, where users (including many native speakers) “prefer” a local term (often an English word or acronym) to the one normally used in English-speaking countries, which they may not actually know, even passively (GPS or navigator for satnav, SMS for text, “to send an SMS to” for “to text”, GSM or even Handy for mobile or cell phone, etc.). Internally, it may often be easier to communicate with these terms than with the correct ones. However, the European institutions also need to communicate with the outside world and EU documents need to be translated – both tasks that are not facilitated by the use of terminology that is unknown to native speakers and either does not appear in dictionaries or is shown in them with a different meaning. Finally, it is worth remembering that, whereas EU staff should be able to understand “real” English, one cannot expect the general public to be “ready” with the EU variety.

A further objection that is often put forward is that one EU institution must use the same terminology as other EU institutions (the European Commission in particular) (A Brief List of Misused English Terms in EU Publications, p.4). That is to say, if the Commission uses the verb “transpose”, for example, the others within must all use the same term, even if they know it to be incorrect. This is a dangerous path to take, especially as the Commission itself recognizes the need to improve the quality of its English and is often hampered in this by constraints that smaller institutions may not face.

Although some institutions ignore the fact that it is hard to understand their documents, some of them are trying to explain it if they want to be sure that readers will understand. In the example of “transpose”, they might add a note saying something like “term used at the Commission/in EU legislation to indicate ...” (in this case, the enactment of a Directive in national law).

Our own experience of working with EU documents in the European Parliament for 5 years (2005-2010) has suggested a hypothetical conclusion that EU texts are useful source for both quantitative and qualitative linguistic research on specific linguistic units. EU institutions publish a large number of on-line documents which contain information of great potential value. In order to utilize the knowledge these data contain, many linguists, terminologists or researchers have been attempting to create common glossaries of EU domain-specific names and terms.

EU English is becoming an especially important field within various types of researches mostly on English for Specific Purposes (ESP) not only in the countries which have recently joined the EU or are in the process of accession as future Member States but also for those which have been preparing themselves for their turn of the EU Council Presidency. Given that the Slovak Presidency of the Council of the European Union was scheduled for the second half of 2016 - in a trio with the Netherlands (January- June 2016) and Malta (January- June 2017)-, it had been very challenging for all Slovak EU experts, ministry officials and administrative staff to cope with overwhelming quantity of reference materials published in English which will require proper comprehension and precise translation.

Taking into account numerous studies on the languages used in the EU context we agree with Jablonkai's (2010) claim that most of them „concentrate on issues of translation and terminology (e.g., Born & Schütte, 1995; Dróth, 2000; Fischer, 2006, 2007; Károly, 2007; Klaudy, 2001; Schäffner & Adab,

2001a, 2001b), language policy or international relations theories (e.g., Diez, 2001; Pym, 2000; Truchot, 2002).“ There are also several studies in various forms that focus on the linguistic analysis of documents issued by institutions of the European Union (Born & Schütte, 1995; Laviosa, 2000; Pym, 1993, Sageder, 2013), however, particularly with the intention of pointing out issues in translation (see Trosborg, 1997; for an overview see Károly, 2007).

„These analyses revealed that EU texts in many official languages have their characteristic syntax, lexis, terminology, and particular style (Born & Schütte, 1995; Dróth, 2000; Fischer, 2006, 2007; Károly, 2007; Klaudy, 2001; Pym, 1993; Pym, 2000, Schäffner & Adab, 2001a, 2001b).“ (Jablonkai, 2010). It is also worth noting the research, conducted by Kast-Aigner, 2009, which presents some of the results of a diachronic analysis of the English terminology that the European Union has created and used in the field of development cooperation since 1957, aiming at portraying the conceptual and terminological changes in this field over time.

According to the language policy of the EU, all documents should be made available in the twenty-four official languages<sup>1</sup> (e.g. Council Regulation (EC) No 1791/2006). In practice, however, due to time and financial constraints, the documents are produced first in one or just some of the working languages of the EU, and very often EU documents are issued first in English (Truchot, 2002 in Jablonkai, 2010).

## 2 Multilingual parallel language resources of the EU

As a source of observation of the EU texts, starting in 2006, the European Commission's Joint Research Centre and other European Union organisations have made available a number of largescale highly-multilingual parallel language resources in between 22 and 26 languages. These are the full-text corpora JRC-Acquis (2006), DGT-Acquis and Digital Corpus of the European Parliament (DCEP,2014), the translation memories (TMs) DGT-TM (2012), ECDC-TM and

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<sup>1</sup> The 24 official EU languages as of January 2014 are Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Irish, Italian, Latvian, Lithuanian, Maltese, Polish, Portuguese, Romanian, Slovak, Slovene, Spanish and Swedish. For most of the EU's corpus resources, no documents are furthermore available in the Irish language (Gaeilge, GA). Irish became an official EU language in 2007, but the EU Institutions are currently exempt from the obligation to draft all acts in Irish. (An overview of the European Union's highly multilingual parallel corpora, 2014)

EAC-TM; as well as the document collection accompanying the multi-label categorisation software JRC EuroVoc Indexer (JEX,2012).

Moreover, a number of further important parallel language resources have been created in this context, even though they were either the outcome of a private initiative or of EU-funded projects.

As stated in the overview of the European Union's highly multilingual parallel corpora, the EU is releasing this data to support the development of multilingual text analysis tools to be related to four main values and objectives:

1. the development of more business potential
2. the improvement of democracy through transparency of information
3. the maintenance of the EU's linguistic diversity
4. the preservation of the EU's cultural diversity.

These main objectives can be derived from Directive 2003/98/EC of the European Parliament and of the Council on the re-use of public sector information, as well as from Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission Documents.

On the other hand, it is important to mention that EU document collections are a very rich resource, but their usefulness has its limits. To summarise, multilingual parallel corpora are useful

- as monolingual corpora for each of the languages involved
- as resources to project linguistic annotation from one highly resourced language to various others and to thus produce multilingual comparable annotated corpora while saving annotation time
- to improve monolingual text analysis tools by exploiting features and semantic distinctions found in other languages
- to produce bilingual or even multilingual cross-language resources such as dictionaries and multilingual vector space representations or to produce applications such as cross-lingual word sense disambiguation, cross-lingual information retrieval, etc.

*(An overview of the European Union's highly multilingual parallel corpora, 2014)*

The source language for most documents produced by the EU institutions is no longer known. Generally speaking, it is known that, in 2008, 72 % of all EC documents were drafted in English and 11 % in French. It is likely that at least some documents were translated via an intermediate language, i.e. that there are translations of transla-

tions.

The cooperation of terminologists, language experts and legal experts is extremely important, due to the many particular features of EU English.

## 2.1 Full-text corpora JRC-Acquis (2006)

*The Acquis Communautaire (AC)* is the total body of European Union (EU) law applicable in the the EU Member States. This collection of legislative text changes continuously and currently comprises selected texts written between the 1950s and now. As of the beginning of the year 2007, the EU had 27 Member States and 23 official languages. The Acquis Communautaire texts exist in these languages, although Irish translations are not currently available. The Acquis Communautaire thus is a collection of parallel texts in the following 22 languages: Bulgarian, Czech, Danish, German, Greek, English, Spanish, Estonian, Finnish, French, Hungarian, Italian, Lithuanian, Latvian, Maltese, Dutch, Polish, Portuguese, Romanian, Slovak, Slovenian and Swedish.

Selection all those CELEX documents that were available in at least ten of the twenty EU-25 languages (the official languages of the EU before Bulgaria and Romania joined in 2007) and that additionally existed in at least three of the nine languages that became official languages with the Enlargement of the EU in 2004 (i.e. Czech, Estonian, Hungarian, Lithuanian, Latvian, Maltese, Polish, Slovak and Slovenian) may be found in JRC-Acquis. The collection distributed here is thus an approximation of the Acquis Communautaire which we call the JRC-Acquis. The JRC-Acquis must not be seen as a legal reference corpus. Instead, the purpose of the JRC-Acquis is to provide a large parallel corpus of documents for (computational) linguistics research purposes.

The Acquis Communautaire is the biggest parallel corpus in existence, if we take into consideration both its size and the large number of languages involved. The most outstanding advantage of the Acquis Communautaire - apart from being freely available - is the number of rare language pair combinations (e.g. Maltese-Estonian, Slovenian-Finnish, etc.).

The AC and other Community legislation is publicly available on the European Commission's web sites. The Optima group of the Joint Research Centre (JRC) in Ispra, Italy, has attempted to identify the documents that are part of the AC, has downloaded them and converted them to XML format. The Bulgarian and Romanian documents were processed by the

Romanian Academy of Sciences. In further processing steps, the texts were cleaned of their footers and annexes, and they were sentence-aligned twice: once using Vanilla and once using HunAlign. Instead of using a single pivot language, all possible 231 language pair combinations were aligned individually. The Publications Office of the European Union (OP) manages the distribution rights of this aligned multilingual parallel corpus. OP agreed that the corpus can be given to research partners for non-commercial use.

JRC-Acquis, DGT-Acquis and DCEP are corpora consisting of full texts with additional information on which sentences are aligned with which others, while the Translation Memories DGT-TM, EAC-TM and ECDC-TM are collections of translation units (mostly sentences), from which the full text cannot be reproduced. Some of the resources overlap, while others are entirely different. JRC-Acquis documents additionally are accompanied by information on the manually assigned Eurovoc subject domain classes so that the JRC-Acquis can also be used to train automatic multi-label classification software.

## **2.2 DGT-Acquis and Digital Corpus of the European Parliament (DCEP, 2014)**

The DGT-Acquis is a family of several multilingual parallel corpora extracted from the Official Journal of the European Union (OJ) in Formex 4 (XML) format, consisting of documents from the middle of 2004 to the end of 2011 in up to 23 languages.

## **2.3 The translation memories (TMs) DGT-TM (2012) ECDC-TM and EAC-TM**

This extraction of aligned sentences can be used to produce a parallel multilingual corpus of the European Union's legislative documents (Acquis Communautaire) in 24 EU languages. The aligned translation units have been provided by the Directorate-General for Translation of the European Commission by extraction from one of its large shared translation memories in EURAMIS (European advanced multilingual information system). This memory contains most, although not all, of the documents which make up the Acquis Communautaire, as well as some other documents which are not part of the Acquis. In order to reduce the size, the extraction uses English as the source language. The sequence in the extracted files is not necessarily the same as in the underlying

documents, and redundancies of text segments like "Article 1" are inevitable. The documents are in the widely used Translation Memory eXchange (TMX) format. In order to be backwards compatible, the header mentions TMX format 1.1, but the files are also compliant with TMX 1.4b. The texts are encoded in UTF-16 Little Endian. The source language of the documents and sentences is not known, but many of the documents were originally written in English and then translated into the other languages.

## **2.4 The document collection accompanying the multi-label categorisation software JRC EuroVoc Indexer (JEX, 2012)**

The European Commission's (EC) Joint Research Centre (JRC) has developed - and makes available - software that automatically assigns EuroVoc descriptors to documents in currently 22 languages. The system uses statistical Machine Learning methods that learn the multi-label categorisation rules from previously manually indexed documents. The method used can be described as profile-based category ranking. This software, called JRC EuroVoc Indexer, or short JEX, has been trained for 22 languages and is available for download from this site. The software allows users to re-train the software on their own data, even using their own, alternative classification systems.

## **3 IATE**

Other important activity could be mentioned, such as the creation of the Inter-institutional terminological database of the European Union (IATE) in 2004, which collected the formerly separate terminological databases of several EU institutions. The use of this database has proven that sharing terminological data is an urgent need today.

IATE has been used in the EU institutions and agencies for the collection, dissemination and shared management of EU-specific terminology. The project partners are:

- European Commission
- Parliament
- Council
- Court of Justice
- Court of Auditors
- Economic & Social Committee
- Committee of the Regions
- European Central Bank

- European Investment Bank
- Translation Centre for the Bodies of the EU

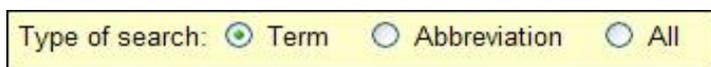
The project was launched in 1999 with the objective of providing a web-based infrastructure for all EU terminology resources, enhancing the availability and standardisation of the information.

IATE incorporates all of the existing terminology databases of the EU's translation services into a single new, highly interactive and accessible interinstitutional database. The following legacy databases have been imported into IATE, which now contains approximately 1.4 million multilingual entries:

- Eurodicautom (Commission),
- TIS (Council),
- Euterpe (EP),
- Euroterms (Translation Centre),
- CDCTERM (Court of Auditors)

Terms in IATE are classified as “term” and “abbreviation”. One can use this distinction to focus his/her query. This is especially interesting if trying to find a translation for an abbreviation.

“Term” has to be considered broadly: it will include terms, group of terms, sentences and formulas.



**Image 1** Type of search in IATE as it is displayed for users on the website of IATE, 2016

Source: [www.iate.europa.eu/help](http://www.iate.europa.eu/help)

## Conclusion

The current spread of English in Europe is of much importance to English language teachers. There is also a heightened interest among language students in studying EU English, which is, learning the characteristics of English as it is used in EU documents and EU institutions.

EU English is gaining importance within the field of English for Specific Purposes (ESP) as new member states prepare for their turn at the EU Council Presidency as it was the case of above mentioned Slovakia's Presidency. Many of those who work with EU documents in their home country or wish to be recruited to an EU institution do not translate but use the information in the documents. Consequently, they need to be proficient enough to

understand the documents

reliably, and to produce other EU related texts complying with the EU norms. (Trebits, 2009).

EU English courses are offered in various institutions such as ministries, language schools and university language centres, for learners with different levels of English and educational or professional backgrounds (Trebits, 2008). Nevertheless, the content of EU English courses is generally based on language teachers' intuitions rather than on a systematic analysis of student motivation, expectations, or linguistic needs. To my knowledge, comprehensive monolingual course books written for students of English focusing on the typical features of EU English and based on corpus analyses of EU documents are not yet available in large number. Our own experience with teaching the course on using EU English in contexts and selecting appropriate systematic materials have proved that it would be effective “exploring the motivation of EU English students in order to fill a gap in theoretical and practical implications of the EU English teaching and learning perspective” (Koltai, 2012, p. 46). As that students coming to an EU English course are motivated by feelings, beliefs and values, which are best described by the following terms: opportunities in the EU, possibilities of working and studying in the EU, obtaining general knowledge about the EU, communicating abroad and future workplace expectations towards employees. The students' immediate and future goals are interdependent. They participate in the EU English class mostly to improve their language competence.

According to Trebits (2008) from an ELT standpoint analysing EU texts and exploring the terminology of the EU has at least two important implications: first of all, studying the characteristics of EU English through authentic texts would benefit professionals from a wide range of fields. Second, EU English has indeed developed into a special language featuring characteristics of political, legal, business, and even academic discourse, thus mirroring the different functions and multiple activities of the EU as a cultural, political and historical reality. In order to establish a sound basis for language courses in English for the EU, research is needed into the lexical, syntactic and discourse characteristics of the register of English used within EU institutions. Furthermore, it is necessary to know more about the target situation and the context of this register.

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# ENGLISH IDIOMS COMMONLY USED IN DAILY COMMUNICATION

JOLANA MELŠITOVÁ

## **Abstract**

*In our article we would like to concentrate on idiomatic expressions used in English language. Idiomatic expressions have long played an important role in the English language. In fact, the use of idioms is so widespread that an understanding of these expressions is essential to successful communication. Every language has its own collection of wise sayings. They offer advice about how to live and also transfer some underlying ideas, principles and values of a given culture, society. These sayings are called „idioms“ or proverbs if they are longer. An idiom is a common word or phrase where the words together have a meaning that is different from the dictionary definitions of the individual words. In other words, idioms don't mean exactly what the words say. Idiomatic expressions are commonly used in everyday conversation by native speakers of English. They are often metaphorical and make the language more colourful. To understand English as it is spoken in real life, English learning students have to be familiar with them. They need to learn what they mean, and how to use them to become an „insider“.*

## **Key words**

*idiomatic expressions, ESL students - students learning English as a second language, EFL students – students learning English as a foreign language, proverbs, clichés.*

**JEL classification: I 23, I 21**

## **I Introduction**

An idiom is a phrase where the words together have a meaning that is different from the dictionary definitions of the individual words, which can make idioms hard for ESL students (students learning English as a second language) and learners to understand. The student may learn grammar and, with time, acquire adequate vocabulary, but without a working knowledge of such idioms as: above all, to get along, on the whole, to look up, etc., even the best student's speech will remain awkward and ordinary. Of course, the idioms selected for study should have practical value and be within the student's ability to comprehend. Such expressions as: to set the world on fire or to wash one's dirty laundry in public may be very colorful, but they do little to help the student achieve fluency in English. Teachers of English have long recognized that idiomatic expressions add grace and exactness to the language. The alert teacher will make their study an integral part of the teaching process. However, learning such expressions is never an easy task for the student learning English as a second or foreign language. Attempts to translate literally from the student's native tongue usually lead to roundabout expression of meaning and, more often, to confusion. Teachers of English

have long recognized that idiomatic expressions add grace and exactness to the language. The alert teacher will make their study an integral part of the teaching process. However, learning such expressions is never an easy task for the student learning English as a second or foreign language. Attempts to translate literally from the student's native tongue usually lead to roundabout expression of meaning and, more often, to confusion. Idiomatic expressions have long played an important role in the English language. In fact, the use of idioms is so widespread that an understanding of these expressions is essential to successful communication, whether in listening, speaking, reading, or writing.

## **II Essential idioms in English and how to teach them**

An idiom is a phrase that has a meaning which is different from the meanings of each individual word in it. For example, if someone says to you "I'm pulling your leg", you might think it is strange because you would definitely be able to feel if someone was holding your leg and pulling it! This idiom actually means that they are teasing you or playing a joke on you. Experienced ESL and EFL teachers will agree, for the most part, with the selection of some essential idioms. However, it should be recognized that any se-

lection is somewhat arbitrary because the range is so great. Some teachers in the teaching classes might prefer to omit certain idioms and to add others, but all should appreciate the attempt to make essential idioms in English, as representative as possible. There are hundreds of common idioms in the English language which we use every day. In fact, most English people do not even realise they are using them! As the meanings are usually completely different to the meanings of the actual words, it can be very difficult to learn them – you need to learn them in the same way you learn new vocabulary.

Some examples:

**A leopard can't change its spots.**

**Meaning:**

A person cannot change who they are (their character), no matter how hard they try.

**Origin:**

This idiom comes from the Old Testament (Jer. 13:23). The Hebrew prophet Jeremiah tries to persuade an evil shepherdess to become good but when he realises that it is impossible to convince her, he says: "Can the Ethiopian change his skin, or the leopard his spots?"

**E.g.:** The waiter tried to be friendly to his customers but a leopard can't change its spots and he was still very rude.

**Let the cat out of the bag .**

**Meaning:**

To reveal a secret or a surprise, usually by accident.

**Origin:**

Many years ago, merchants often sold live piglets to customers. After putting a piglet in a bag so the customer could transport it easily, dishonest merchants sometimes swapped the piglet for a cat when the customer looked away. The buyer often didn't discover the trick until they got home and really let the cat out of the bag, revealing the merchant's secret!

**E.g.:** "It's a secret. Try not to let the cat out of the bag."

"I was really looking forward to seeing the film, until Jack let the cat out of the bag and told me the ending!"

**Not my cup of tea.**

**Meaning:**

If something is not your cup of tea, you do not like it or you are not interested in it.

**Origin:**

The positive version of this expression, "it's my cup of tea", has been in use since the late 1800s when

the British started using the phrase "my cup of tea" to describe something they liked. (We all know that the British love their tea!) In the 1920s, the word 'not' was added to the phrase to describe something that they didn't like.

**E.g.:** "Some people love playing cricket, but it's not my cup of tea."

**Sleep on it.**

**Meaning:**

To spend time (usually at least a day) thinking about something carefully before making a decision.

**Origin:**

It is not known where this idiom originated from but people often believe that if they do not have the solution to a problem straight away, a good sleep will help. Some people think that the brain continues to solve problems while we are sleeping and when you wake up the solution will just be there! However, others believe that we can make better decisions after sleep as the brain is 'fresh'.

**E.g.:** Mr Davis: "So Tom, would you like to work here?" Tom: "I'm not sure. Can I sleep on it and let you know tomorrow?"

### III English idioms commonly used in daily language

Idioms are words, phrases or expressions which are commonly used in everyday conversation by native speakers of English. They are often metaphorical and make the language more colourful. People use them to express something more vividly and often more briefly. They serve as an image of mental picture. An idiom is an expression that cannot be understood literally. Even when a person knows the meaning of all the words and understands the grammar, the overall meaning of the idiom may be unclear. When students gain an understanding of American idioms, and the facility to use them, they are truly a part of the American English speech community. This may be one reason why so many students are interested in learning idioms. Some idioms are so widely used that they are clichés—so commonplace in the spoken language that they are best avoided in writing for fear of suggesting an unoriginal mind! Clichés and proverbs, another form of idiomatic usage, do not vary in form, e.g., "Curiosity killed the cat" not "the dog" and "Too many cooks spoil the broth" not "the meal." Other idioms may allow for some form of variation, such as "to look (or feel) like death warmed over;" or in the form of taking on modifi-

ers, e.g., “It was (beautiful) music to my ears.” When we are speaking it is important that we use the correct idiom in the appropriate situation. For example, some idioms are used mainly in informal situation while others are appropriate in both informal and formal contexts. We will give some examples of idioms that are appropriate for general use:

**Actions speak louder than words** – actions are more important than words.

**A piece of cake** – that test was a piece of cake, it means easy.

**Beating around the bush** – not discussing what is important.

E.g. I needed to study, but I kept beating around the bush.

**Easier said than done** – easy to say but hard to actually do.

E.g. Changing the world is easier said than done.

**I was knocked on my heels** – I was surprised.

E.g. I was knocked on my heels when I realized I got the job.

**Kill two birds with one stone** – accomplish two things at once.

E.g. You can kill two birds by checking email and study at the library.

**Last shot** – last chance.

E.g. The final exam is my last shot to get an A in the class.

**No big deal** – no need to worry.

E.g. If you can not make it to my birthday dinner it is not a big deal.

**Since day one** – for a long time.

E.g. I have been playing basketball since day one.

**Beat a dead horse** – to continue doing or discussing something, even though it has already been tried or discussed and the situation will probably not change.

E.g. Sarah asked her dad 10 times if she could stay out past midnight, but the answer was always no, She was really beating a dead horse.

**Straight from the horse’s mouth** – from the most direct source.

E.g. Someone told me that John became a pilot even though he is scared of airplanes. But I won’t believe that until I get it straight from the horse’s mouth.

#### IV English idioms in Business

There are many idioms used in the business world. If we do not understand these expressions, it is easy to get lost in a conversation. We have chosen some

of the most common idioms used at work concerning **communication**:

**drop someone a line** If you drop someone a line, you write a letter to them.  
E.g. I always drop her a line to wish her a Merry Christmas.

**get hold of** If you obtain something, or manage to contact someone. You get hold of them.  
E.g. I’d like to contact the owner. Do you know where I can get hold of him?

**get/give the low-down** If you get or give the low-down, you get or give complete information or facts about something.  
E.g. I’ll call you after the meeting and give you the low-down.

**hit the airwaves** When someone hits the airwaves, they go on radio and/or TV to be interviewed or to promote something.  
E.g. The hospital was embarrassed when the patient hit the airwaves with his side of the story.

**hot off the press** If a news article, for example, is hot off the press, it has just been published and contains the most recent information on the subject.  
E.g. I just got it hot off the press; another bank has gone bankrupt

**keep someone posted** If someone asks you to keep them posted, they want you to keep them informed about a situation.  
E.g. Our agent promised to keep us posted on developments in the negotiations.

**out of touch** If you are out of touch, you no longer communicate

with someone, or you are unaware of recent developments.

E.g. I've been out of touch with Jenny since we left college

***put someone in the picture***

If you give somebody all the information necessary to enable them to fully understand a situation, you put them in the picture.

E.g. Some changes were made during your absence. Let me put you in the picture.

***speed networking***

This term refers to a relatively new urban trend which consists in making a potential business contact by briefly talking to a series of people at an organised event and exchanging contact details.

***touch base***

If you touch base with someone, you make contact or renew communication with them.

E.g. I'll try to touch base with you next week in London

***word of mouth***

Information passed on through conversation is transmitted by word of mouth.

E.g. No announcement was necessary - the news had already spread by word of mouth.

In business, success depends on putting the right people in the right positions. And decisions about who does what often comes down to work experience. Some jobs are too important to give to someone lacking experience. For other jobs, we might want a person with experience and a fresh approach. So, whether we are hiring new staff, delegating tasks, or putting together a project team, we will be talking about experience. And English has many useful idioms to describe **work and work experience:**

***golden handshake***

A golden handshake is a generous sum of money given to a person when they leave a company or retire (sometimes given to encourage early retirement.)

***golden parachute***

A golden parachute is a clause in an executive's employment

Contract stating that the executive will receive certain large benefits if their employment is terminated

***glass ceiling***

This term refers to a discriminatory barrier perceived by women and minorities that prevents them from rising to positions of power or responsibility.

E.g. Claire knew she would never break the glass ceiling and rise to a senior management position.

***hang up one's boots***

When a sports player hangs up their boots, they stop playing and retire. (This expression is often used to refer to retirement in general).

***learn the ropes***

If you learn the ropes, you learn how to do a particular job correctly.

E.g. He's bright. It won't take him long to learn the ropes.

***paid peanuts***

If you are paid peanuts, you have a very low salary

E.g. Jenny has a very interesting job, but she's paid peanuts.

Think about all the different people we live and work with. There are probably some we get along with well, and others we don't. There are some we would hire but not invite for dinner, and others we would invite for dinner but would never hire. And the difference between all these people is probably their personality. English has lots of idioms for describing **personality:**

**abbreviated piece of nothing**

This slang expression refers to someone who is considered to be insignificant or worthless.

E.g. Bob doesn't think much of his new colleague. He calls him an abbreviated piece of nothing.

**all brawn and no brain**

Someone who is physically very strong but not very intelligent is said to be all brawn and no brain.

E.g. He's an impressive player to watch, but he's all brawn and no brain.

**Some idioms describing agreements and arrangements:**

**in black and white**

To say that something is in black and white means that there is written proof of it.

E.g. It's an obligation. It's written in black and white in your contract.

**clinch a deal**

In a business relationship, if you clinch a deal, you reach agreement on a proposal or offer.

E.g. Tom's final argument enabled us to clinch the deal

**a done deal**

This expression is used to refer to an agreement or decision which has been reached on a certain matter  
E.g. We're still considering several proposals, so it's not a done deal yet.

**gentleman's agreement**

When an agreement is neither written nor signed, because the two parties trust each other completely, it is called a gentleman's agreement.

E.g. It was a gentleman's agreement. I can't change my mind now!

**a matter of form**

If you do something out of politeness, or because it is accepted practice or the usual way of doing something, you do it as a matter of form.

E.g. I know we're in agreement, but I need your signature as a matter of form.

**sign on the dotted line**

If you sign on the dotted line, you formally give your consent to something by signing an official document.

I consulted my lawyer before signing on the dotted line.

**Politeness – Manners:**

**black tie event**

This expression refers to a formal event at which men are required to wear a dinner jacket, or tuxedo, and a black bow tie.

E.g. I need to know if it's going to be a casual get-together or a black tie event.

**bow and scrape**

To say that someone is bowing and scraping means that they are being excessively polite or servile.

E.g. The President was greeted with much bowing and scraping

**the done thing**

The correct way to behave in a particular social situation is called the done thing.

E.g. Wearing jeans to play golf is not the done thing in this club.

**excuse/pardon my French**

This expression is used as an apology for using crude or offensive language.

E.g. He's a bloody nuisance, if you'll excuse my French.

<b><i>Speak out of turn</i></b>	<p>If someone speaks out of turn, either they intervene at the wrong moment or they say something tactless or inappropriate.</p> <p>E.g. At the first meeting I was afraid of speaking out of turn.</p>	<b><i>in the blink of an eye</i></b>	<p>If something happens in the blink of an eye, it happens nearly instantaneously, with hardly enough time to notice it.</p> <p>E.g. The pickpocket disappeared in the blink of an eye.</p>
<b><i>stand on ceremony</i></b>	<p>When people stand on ceremony, they behave in a very formal way.</p> <p>E.g. We'd be delighted to come and see you but please don't stand on ceremony.</p>	<b><i>by degrees</i></b>	<p>If something happens or develops by degrees, it happens gradually or little by little as time goes by.</p> <p>E.g. By degrees their business relationship grew into friendship.</p>
<b><i>take French leave</i></b>	<p>If you leave an official or social event without notifying the person who invited you, you take French leave.</p> <p>E.g. Is Bill coming back for the closing speech or has he taken French leave?</p>	<b><i>cut loose</i></b>	<p>If someone cuts loose or is cut loose, they stop being influenced or controlled by another person or group.</p> <p>E.g. He's thirty years old and still hasn't cut loose from his family.</p>
<b><i>time-honoured practice</i></b>	<p>A custom that is universally respected, or a traditional way of doing something, is called a time-honoured practice.</p> <p>E.g. Guests were greeted according to a time-honoured practice.</p>	<b><i>get on like a house on fire</i></b>	<p>Two people who get on like a house on fire have similar interests and quickly become good friends.</p> <p>E.g. As soon as Sarah met her brother's girlfriend, they got on like a house on fire.</p>
<b>Time:</b>			
<b><i>against the clock</i></b>	<p>If you do something against the clock, you are rushed and have very little time to do it.</p> <p>E.g. They are working against the clock to have the presentation ready for Sunday.</p>	<b><i>get a raw deal</i></b>	<p>If you say that someone has got a raw deal, you think they have been treated unfairly or badly.</p>
<b><i>on the cusp</i></b>	<p>On the cusp refers to a point in time that marks a transition or the beginning of the change.</p> <p>E.g. Some people think the world is on the cusp of a new era.</p>	<b><i>play gooseberry</i></b>	<p>If you play gooseberry, you join or accompany two people who have a romantic relationship and want to be alone.</p> <p>E.g. They invited me to join them but I didn't want to play gooseberry.</p>
		<b><i>be an item</i></b>	<p>To say that two people are an item means that they are involved in a romantic relationship.</p>

E.g. So Sally and Harry are an item, are they?

***know someone inside out***

If you know someone inside out, you know them very well.

E.g. Sue and Anne have been friends since childhood. They know each other out.

**Relationship:**

***birds of a feather flock together***

If two people are birds of a feather, they are very similar in many ways, so they naturally spend time together.

E.g. No wonder they get on well. They're birds of a feather.

***build bridges***

If a person builds bridges between opposing groups, they help them to cooperate and understand each other better.

E.g. A mediator is trying to build bridges between the local community and the owners of the new plant.

***cut loose***

If someone cuts loose or is cut loose, they stop being influenced or controlled by another person or group.

E.g. He's thirty years old and still hasn't cut loose from his family.

***see eye to eye with someone***

If you see eye to eye with somebody, you agree with them.

E.g. I'm glad we see eye to eye on the choice of colour scheme.

***fair-weather friend***

Someone who acts as a friend when times are good,

and is not there when you are in trouble, is called a fair-weather friend.

E.g. I thought I could count on Bill, but I've discovered he's just a fair-weather friend.

***herding cats***

This expression refers to the difficulty of coordinating a situation which involves people who all want to act independently.

E.g. Organizing an outing for a group of people from different countries is like herding cats!

***be an item***

To say that two people are an item means that they are involved in a romantic relationship.

E.g. So Sally and Harry are an item, are they?

***know someone inside out***

If you know someone inside out, you know them very well.

E.g. Sue and Anne have been friends since childhood. They know each other inside out.

**Employment:**

***busman's holiday***

A busman's holiday is when you spend your spare time or your holidays doing the same sort of activity as you do in your job.

E.g. My husband is a chef, so for him time off with the family is often a busman's holiday!

***cream of the crop***

This expression refers to the best people or things in a particular group.

E.g. As usual, the cream of the crop of this year's graduates were offered the best jobs.

**dead wood**

The term dead wood refers to people or things which are no longer considered useful or necessary.

E.g. The new manager wants to reduce costs by cutting out the dead wood

**on the dole**

A person who receives financial assistance from the government when they are unemployed is on the dole.

E.g. Their father is on the dole so the family is living on a tight budget.

**IV Conclusion**

As we are already aware, a knowledge of idioms is essential for understanding spoken English. People use them all the time in place of more formal ways of expressing themselves. Idioms add life and vitality to language. Without idioms language may be correct, but tends to be rather dull.

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# THE ROLE OF MOTIVATION IN LEARNING FOREIGN LANGUAGES

HANA PAŠKOVÁ

## **Abstract**

*In our paper we analyse the major theories of motivation which play a significant role in teaching foreign languages. Our paper characterizes the relation between personality attributes of students and successful learning of the foreign language. We focus on the role of the teacher whose aim is not only to generate but also maintain motivation during the whole teaching process. This can be achieved by varying learning tasks, teacher's presentation style, attractive learning materials with interesting content and providing opportunities for success in the language class. We characterize the most effective motivational strategies which help students achieve the best results when studying foreign languages.*

## **Key words**

*motivation, motivational strategies, learning process, students' involvement, teacher's role, stimulating tasks*

## **JEL classification: I 23**

## **Introduction**

Motivation plays a vital role in the process of learning foreign languages as it is crucial for achieving desired results. Different authors define the concept of motivation differently but their approach have three common aspects, that is, they are all principally concerned with factors or events that stimulate, channel, and prolong human behaviour over time (Steers et al. 2004). According to Locke and Latham (2004) motivation influences people's acquisition of skills and the extent to which they use their ability. The authors state that the concept of motivation refers to internal factors that impel action and to external factors that can act as inducements to action. The three aspects of action that motivation can affect are direction (choice), intensity (effort), and duration (persistence). Motivation can affect both the acquisition of people's skills and abilities; and also the extent to which they utilize their skills and abilities (Locke and Latham, 2004).

## **Intrinsic and extrinsic motivation**

Researchers trying to find out what motivates students generally recognize two major types of motivation: intrinsic and extrinsic. Lawler (1970) defines intrinsic motivation as the degree to which feelings of esteem, growth, and competence are expected

to result from successful task performance. According to Amabile et al. (1993) individuals are said to be intrinsically motivated when they seek interest, satisfaction of curiosity, self-expression, or personal challenge in the work. Intrinsic motivation may be defined as desire to do or achieve something because one truly wants to and takes pleasure or sees value in doing so. Advantages of intrinsic motivation in the learning process are its long-lasting effect and sustainability as well as promoting students' learning which focuses on the subject rather than rewards or punishment. Disadvantages include necessity of variety of approaches needed to motivate different students which requires the teacher's familiarity with students' interests and personality traits (De-Long and Winter, 2002). On the other hand extrinsic motivation is the desire to do or achieve something not for the enjoyment of the thing itself, but because doing so leads to a certain result (Pintrich, 2003). For the university students extrinsic motivation may be represented in the form of grades, praise from the teacher, parental expectations, which could sometimes lead to focusing attention on achieving these goals instead of reinforcing the benefits of learning. Advantages of this type of motivation include less effort and preparation from the teacher as it does not require knowledge of individual students and faster changes in behaviour of students. Disadvantages are mostly students' distraction from learning the subject and necessity for the teacher to increase the rewards or punishment over time to maintain motivation. Another disadvantage is limited period of time as it usually does not work over the long term. Once

the rewards or punishments are removed, students lose their motivation (DeLong and Winter, 2002). Results of some research work indicate the fact that extrinsic rewards can have a negative impact on intrinsic motivation.

### **Motivational strategies in teaching process**

Motivational strategies are techniques that promote the individual's goal-related behaviour. (Dörnyei, 2008). The main motivational strategies according to Nilson (2010) are represented by appropriate teacher behaviour, design, structure and organization of the course, meaningful and worthwhile teaching methods. Among motivational strategies also belong assignments giving students plenty of opportunity to practice performing their learning outcomes before the teacher grades them on the quality of their performance as well as carefully prepared tests providing students prompt and constant feedback on their performance. The last motivational strategy according to this author is the equity in the classroom which can be established by creating a safe climate for the expression of different points of view, giving attention and praising all students equally and being sensitive to difficulties students may experience.

Dörnyei (2008) presented the main motivational strategies in the language classroom which are categorized into four groups: creating the basic motivational conditions, generating initial motivation, maintaining and protecting motivation and encouraging positive self-evaluation. The concept of all these strategies is based on the idea that teacher's behaviour and beliefs significantly affect students' motivation. There are many motivational strategies influencing the effectiveness of the teaching process and making the process more interesting. (Dörnyei, 2008) suggests three main types of motivational strategies:

- breaking the monotony of learning
- making the tasks more interesting
- increasing the involvement of students

Monotony of teaching process is one of the factors having the negative impact on the students' motivation. It is rather frequent phenomenon which occurs even with the teachers who tend to use various and interesting teaching procedures. Therefore if we want to avoid monotony we should concentrate on using a variety of teaching methods and assignments given to students. One of the areas we should focus on are the language tasks which include linguistic

phenomena as grammar, vocabulary, language skills i.e. speaking, reading, writing, listening, using various audio-visual devices and implementing different organizational methods as group work which can significantly encourage active learning and develop communication skills.

Besides the variety of tasks the significant role in breaking the monotony of the teaching process is played by the teacher, especially his presentation style, the choice of learning materials, the extent of students' involvement and arrangement of the whole classroom. If we want to maintain attention of the students the important factor is rhythm of the lesson and sequence of tasks. Varying the tasks is important but not even the richest variety will motivate if the content of the tasks is not attractive to the students (Dörnyei, 2008: 75). In order to avoid boredom the tasks introduced during the teaching process should be challenging. They should promote critical thinking and creativity and motivate students to solve problems.

### **Motivation in foreign language teaching**

The research in the area of the second language acquisition pointed at the differences resulting from the specific aim of the teaching process. Mastering the foreign language doesn't mean only to learn its grammatical structures and vocabulary which can be learnt in the similar way as other subjects but according to Gardner (1988) besides educational phenomenon it includes the cultural heritage of the speakers of that language. The language and the culture of the given area are mutually interrelated which has the evident impact on the results of the teaching process. Those students who for whatever reasons do not have positive attitudes to the nation speaking the language will have the negative approach towards learning the given language. Besides social and cultural milieu he emphasizes the other features of foreign language acquisition namely individual learner differences, the setting in which learning takes place and linguistic outcomes. Individual learners' differences are believed to be most influential in second language acquisition. They include the variables of intelligence, language aptitude, motivation and situational anxiety (Giles and Coupland, 1991). Closely related with these individual differences is the context in which learning takes place. There are two main contexts: formal instruction in the classroom and language acquisition in a natural setting. The impact of the individual variables

changes depending upon the context. Intelligence and aptitude play the dominant role in a formal setting, while their influence is weaker in an informal setting. The variables of motivation and situational anxiety are believed to have equal influence. Linguistic outcomes refer to language knowledge and language skills and they are related to course grades and proficiency tests (Norris-Holt, 2001). Williams (1994) also argues that “learning a foreign language is different from learning other subjects because it involves far more than simply learning skills, or a system of rules, or a grammar; it involves an alteration in self-image, the adoption of new social and cultural behaviour and has a significant impact on the social nature of the learner” (Williams 1994:77).

Dörnyei (2008) put forward a new model of motivation theories emphasizing changes of motivation over time. He claims that “motivation cannot be viewed as a stable attribute of learning that remains constant for several months or years” (Dörnyei, 2008:19). Students’ motivation fluctuates which may be caused by different factors, such as the period of the school year as the motivation tends to decrease with time or the type of activity presented in the class. Following from that assumption he emphasizes that motivation needs to be initially generated, then in the second phase maintained and protected to remove distracting influences and finally followed by retrospective evaluation of the whole process which will have impact on further proceedings in the future. In order to make the language learning process a more motivating experience teachers should develop programs which maintain student interest and have obtainable short term goals. Teachers need to create interesting lessons in which the students’ attention is gained. This can sometimes be accomplished by the use of teaching strategies which are not often called upon by other teachers in mainstream subject areas. One of the methods how to increase students’ motivation in foreign language teaching can be the use of interesting texts containing topics which can create a great deal of classroom interaction and thus motivate students to develop their language skills. Unfortunately many texts in foreign language textbooks often include material which fails to capture the interest of students due to the heavy emphasis on vocabulary and grammar. It is important for the instructor to take advantage of interesting discussion topics which will not only contribute to the language proficiency of students but also enhance their perception and understanding of other cultures. As teachers of Business English at the University of Economics in Bratislava we try to choose teaching

materials which are not only relevant to the study specialization of students but also provoke students to participate in discussions related to the most important economic, political and social issues. Our aim is therefore not only to improve English communication skills but also to promote creativeness and critical thinking of our students.

### **Motivation and students’ personality variables**

There are many research findings supporting the conclusion that there is the relation between personality attributes and successful learning of the foreign language. Successful learners may have different types of characteristics, they are usually described as extrovert, self-confident, active, independent, while unsuccessful learners are more frequently characterized as demonstrating a lack of self-confidence and being shy, afraid to express their opinion. Deci and Ryan (1985) emphasize the importance of friendly and supportive environment and the judgements of classmates which influence outcomes of learning foreign languages. When the external environment is supportive even the students lacking the required attributes may achieve good results. Therefore success of learning process is resulting from both internal and external factors. Besides personal attributes there are another factors playing the dominant role in achieving positive results in teaching foreign languages namely attitudes of students and their motivation. When the only reason for learning a second language is external pressure there is the lack of internal motivation and positive attitudes towards learning. On the other hand if learners have positive attitudes towards the foreign language they are more likely to achieve good result. According to the findings of some research works there exists a distinction between different types of attitudes according to factors in the environment or subject characteristics such as age or sex. Researchers have tried to find connections between personality types and different aspects of language learning. Harter (1981) in his book dedicated to the way in which languages are learned suggests that that influence of motivation doesn’t have the same effect on all aspects of language proficiency. The findings of the research show that highly motivated students achieved better results in oral communication skills but were not found more successful in the test assessing grammatical knowledge. Sex differences are also thought to influence attitudes and motivation: experience indicates that girls tend to demonstrate significantly

more positive attitudes towards learning languages than boys, a good example in this respect being the overwhelming majority in the faculties of philology and foreign languages (Gilakjani, 2012).

### **Differences among students concerning their approach towards learning foreign languages**

In the last years a lot of effort has been dedicated to improving methodology of teaching foreign languages and raising student achievement. Attention has primarily focused on factors like improving teachers' quality, upgrading curriculum and standards, and developing new assessment methods, but one major factor has been overlooked: the motivation of the students themselves. Even with the best teachers, teaching methods, course designs and materials, achieving successful results will be difficult if students are not motivated to learn. Higher motivation to learn has been linked not only to better academic performance, but to greater satisfaction with school, self-esteem, and social adjustment (Gottfried, 2009; Ryan & Deci, 2009).

Motivation can affect how students approach school in general, how they relate to teachers, how much time and effort they devote to their studies. Researchers have found that how students think of their own capacity to learn can influence how motivated they are (Murray, 2011). If a student believes that he or she has a limited capacity for learning or feels unlikely to succeed, that student will not be as academically motivated (Pintrich, 2003). Various authors agree on the major factors students need to have in order to be motivated: competence, the belief that they're capable of doing something, autonomy and control represented by the ability to set appropriate goals and see a correlation between effort and outcome, interest in the task and a feeling that its value is worth the effort to complete it, and relatedness demonstrated by the need to feel as a part of a group or social context and exhibit behaviour appropriate to that group (Murray, 2011; Pintrich, 2003; Ryan & Deci, 2009). While a friendly and supportive environment may represent a positive motivational factor, on the other hand the judgements of classmates may be also harmful and destroy the belief in student's ability to succeed.

Dörnyei (2008) divides students according to their dominant motivation to learn the foreign language to two groups integrative and instrumental. Integrative motivation is characterised by the learner's positive attitudes towards the target language group and the

desire to integrate into the target language community. This approach assumes that students who are most successful when learning a target language are those who like the people who speak the language, admire the culture and have a desire to become familiar with or even integrate into the society in which the language is used. Instrumental motivation is associated with the potential pragmatic gains of the second language proficiency and underlies the goal to gain some social or economic reward through L2 achievement, such as meeting the requirements for university graduation, getting a better job or a higher salary based on language ability or achieving higher social status.

### **The role of the teacher in the motivational process**

The role of the teacher is recognized as being highly significant in all stages of the motivational process. A good teacher of foreign languages should have some important qualities. Among the most relevant belong the teacher's enthusiasm, acknowledgement and stimulation of students ideas, the creation of a relax and enjoyable atmosphere in the classroom. Equally important is the teacher's ability to present activities in a clear, interesting and motivating way as well as encouraging students with difficulties and thus helping them to increase their expectations of themselves (Gilakjani, 2012). Teachers should be aware that it is important to motivate especially underachieving or reluctant students in the form of good marks or simple praise. This positive motivation brings better results than punishment or other sanctions which not only proved ineffective but have exactly the opposite effect. The motivational process in the classroom depends mostly on the teacher's motivational teaching practice and is exclusively under his control. According to Spolsky (1989) motivational process comprises three phases: generating initial motivation, maintaining and protecting motivation and encouraging positive retrospective self-evaluation. Creating initial students' motivation comprises following strategies:

- enhancing language related values and attitudes
- increasing the learner's expectancy of success
- increasing the learner's goal orientation
- making the teaching materials relevant for the learners
- creating realistic learner beliefs

In the process of teaching foreign languages it is not sufficient to create initial motivation but even more important and probably more difficult is its maintaining and protection. Following are some research-based strategies which are relevant:

- making learning stimulating and enjoyable
- presenting tasks in a motivating way
- increasing the learners' self-esteem and self confidence
- promoting self-motivating learner strategies

Promoting self-motivating strategies means to find the ways for the learners to motivate themselves which is extremely important in second language learning due to the long lasting character of this process.

Encouraging positive retrospective self-evaluation means using appropriate strategies to evaluate students' performance in the way that emphasizes more their success and progress than failures which should be analysed in a constructive way. The findings of extensive research have shown that motivation of students is influenced by the perception of their previous accomplishments and satisfaction experienced after successful task completion, which will have an effect on their approach to subsequent learning process (Dörnyei, 2008).

We would like to emphasize that only a highly motivated teacher can motivate students in the appropriate way. The foreign language teacher should become a role model for his students by demonstrating enthusiasm and interest in the subject taught. At the same time he should display an interest in students' learning and also belief in their abilities to make progress. Breaking the monotony of learning is an important task which can be achieved by using a variety of activities which will be not only interesting for students but also enable them to be directly involved in the learning process. One of the most important motivational strategies is providing feedback which should be presented in the way which stimulates advancement. Criticism should be constructive and assessment of students' work should stress the progress students have mastered instead of emphasizing negative aspects.

## Conclusion

Motivation is one of the most important factors determining success in the language classroom. Motivating learners to learn the target language effectively is a complex task which should initiate positive attitudes towards language learning. In our paper we have analysed some motivational strategies which should contribute to higher effectiveness of foreign language education. It is important to keep in mind that students are different and individual motivational strategies may have different impact on students. We believe that their selective use in the process of teaching foreign language can enhance the attractiveness of language courses at the university level. Appropriately used motivation strategies can promote students' interest in the target language and maintain their motivation throughout the whole teaching process which will lead to achieving better results and higher effectiveness.

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# BERUFSBEZOGENES DEUTSCH

MAGDALÉNA PATÉ

## **Abstract**

*Berufsbezogener Fremdsprachenunterricht ist heutzutage wichtiger Teil des Sprachenlernens. Die Veränderungen am Arbeitsmarkt und die Globalisierung stellen neue Anforderungen an Fremdsprachenkenntnisse und kommunikative Handlungskompetenz der Lernenden. In der Zeit der Migrationskrise in Deutschland gewinnt berufsbezogene Sprachförderung an Bedeutung, man versucht die Zuwanderer schnell in den deutschen Arbeitsmarkt auch durch Sprache zu integrieren. Konzept vom berufsbezogenen Deutsch ist nicht neu, aber erst in den letzten Jahren wird so stark von der Bundesregierung gefördert. In den neuen Lehrwerken zum Thema „Deutsch am Arbeitsplatz“ werden auch Ergebnisse der Fachdiskussion zum berufsbezogenen Deutsch erkennbar.*

## **Schlüsselwörter**

*berufsbezogenes Deutsch, Deutsch am Arbeitsplatz, Deutsch als Fremdsprache, Migrationskrise, Integration, Deutschland*

**JEL classification: I 23, I 25**

## **Einleitung**

Berufsbezogenes Deutsch ist ein Teilbereich von Deutsch als Fremdsprache und bedeutet Kommunikation auf Deutsch am Arbeitsplatz, wo die sprachlichen Anforderungen immer komplexer werden. Die Arbeitswelt erfährt durch die Globalisierung viele Veränderungen und die Bedeutung von Fremdsprachen wächst. Das Konzept der berufsbezogener Deutschkurse, der in Deutschland ausgearbeitet wurde, betrifft Deutsch als Fremdsprache (DaF) und auch Deutsch als Zweitsprache (DaZ). Heutzutage ist das Thema besonders aktuell, weil es vor allem den Berufseinstieg der Migrantinnen und Migranten erleichtern und ihnen bei der Integration auf den deutschen Arbeitsmarkt helfen soll. Der berufsbezogene Deutschunterricht kann sich auf den Arbeitsmarkt, auf ein Berufsfeld oder auf einen konkreten Beruf beziehen.

In unserem Beitrag konzentrieren wir uns auf die Entwicklung des berufsbezogenen Deutschunterrichts und vor allem auf die Situation in der Zeit der großen Migrationskrise. Die Förderung der deutschen Sprache wird zu einem wichtigen arbeitsmarktpolitischen Instrumenten in Deutschland, was wir in unserem Beitrag näher beschreiben. In dem letzten Teil unseres Beitrags beschreiben wir spezifische Merkmale des berufsbezogenen Deutschunterrichts, was

wir am Beispiel eines Lehrwerkes zur Kommunikation am Arbeitsplatz schildern.

Obwohl die Integration auf den deutschen Arbeitsmarkt nicht Ziel der Studenten an der Wirtschaftsuniversität in Bratislava ist, gibt es genügend Gründe, „Deutsch für den Beruf“ zu lernen. Unsere Absolventen arbeiten für deutsche oder österreichische Firmen, haben Kunden oder Lieferanten in deutschsprachigen Ländern, wollen auf Deutsch mit ihren deutschen Kollegen sprechen. Deshalb benutzen wir auch Lehrwerke, die unsere Studenten sprachlich besser auf das Berufsleben vorbereiten sollen. Aus diesem Grund ist berufsbezogenes Deutsch auch für Lehrkräfte und Studierende in der Slowakei von großer Interesse.

## **Anfänge des berufsbezogenen Deutschunterrichts**

Die institutionalisierten Deutschkurse für ausländische Arbeiter in Deutschland und Österreich stehen am Anfang des berufsbezogenen Deutschunterrichts. In Deutschland wurden seit Ende der 1960er Jahren Deutschkurse für Gastarbeiter organisiert. Das Hauptziel war, die Sicherheitsanweisungen in den Firmen auch für ausländische Mitarbeiter verständlich zu machen, damit man Unfälle vermeiden und Kosten für ÜbersetzerInnen und DolmetscherInnen senken kann. (Hufnagl, C.L, Daase, A., Haider, B., Szablewski-Çavus, P. Weiss, W., 2011).

Der besondere Lernstatt-Konzept wurde entwickelt. Es ging darum, die innerbetrieblichen Abläufe auch

für neue ausländische Mitarbeiter zu beschreiben, Sicherheitsanweisungen zu übermitteln und andere Aspekte des Berufslebens in Deutschland zu erklären. Es war nicht als Sprachkurs gemeint, obwohl dabei die Sprachkenntnisse der ausländischen Mitarbeiter weiterentwickelt werden konnten. Die „Lehrer“ waren inländische Mitarbeiter, die sich nach oder vor der Arbeitszeit mit ihren ausländischen Kollegen zusammentrafen. Die einzelnen Betriebe haben so Verantwortung für den Unterricht ihrer ausländischen Arbeiter übernommen. Das sind die Anfänge des berufsbezogenen Deutschunterrichts, die der Grund der wissenschaftlichen Bearbeitung dieses Bereiches waren und führten zur Institutionalisierung der Deutschkurse für ausländische Mitarbeiter. Die Kursträger waren so erst später Einrichtungen der Erwachsenenbildung in Deutschland, die zuerst weder Erfahrungen mit der Zielgruppe der ausländischen Mitarbeiter, noch Instrumentarium (wissenschaftliche Grundlagen, Lehrpläne, Lehrmittel) zur Organisation solcher Kurse hatten. (Szablewski-Çavus, P. 2010)

Die berufsbezogenen Deutschkurse sind vor allem für Erwachsene bestimmt, obwohl die Jugendlichen im Übergang Schule-Beruf inbegriffen werden können. Der berufsbezogene Fremdsprachenunterricht kann mehrere Ziele verfolgen: er soll auf das Berufsleben vorbereiten, das Berufsleben unterstützen oder bei der Weiter- und Fortbildung der Arbeitnehmer helfen.

### **Berufsbezogenes Deutsch in der Zeit der Migrationskrise und ihre staatliche Förderung**

Seit 2014 erlebt die Europäische Union einen enormen Flüchtlingszustrom. Es gibt mehrere politische und sozioökonomische Ursachen, die Millionen von Menschen auf die Flucht treiben. Der Krieg in Syrien und instabile Situation in Nordafrika nach dem Arabischen Frühling halten wir für die wichtigsten Gründe für die globale Massenflucht. Deutschland gehört zu den Ländern, die am meisten von der gegenwärtigen Migrationskrise betroffen sind. Die Anzahl der Asylbewerber in Deutschland steigt in den letzten drei Jahren stark. In 2014 haben deutsche Behörden 202 834 Asylanträge registriert, im Jahre 2015 waren es schon 476 649 Anträge und in 2016 hat die Anzahl der Asylbewerber das Rekordniveau von 745 545 erreicht. (Aktuelle Zahlen zu Asyl 2017, BAMF). Das ist die größte Anzahl in der deutschen Geschichte überhaupt.

Der Ausweg aus dieser schwierigen Situation ist die erfolgreiche Integration der Zuwanderer in Deutschland. Die Flüchtlinge können als eine Chance für Deutschland betrachtet werden, wo die alternde Bevölkerung und der Arbeitskräftemangel die wirtschaftliche Dynamik bedrohen. Ohne neue Bewohner wären die sozialen Sicherungssysteme und besonders das Rentensystem in Deutschland nicht haltbar. Integration der Flüchtlinge erfordert hohe Investitionen, die am Anfang zur Grundversorgung der Flüchtlinge, Bereitstellung von Kapazitäten zur Ausbildung und auch Vermittlung der Sprachkenntnisse bestimmt sind (Bräuninger, Peters, Schneider 2015). Seit 2005 ist mit den konkreten Integrationsaufgaben Bundesamt für Migration und Flüchtlinge (BAMF) mit dem Hauptsitz in Nürnberg beauftragt.

Die erste Hürde, die die Zuwanderer in Deutschland begegnet, ist die deutsche Sprache. Flüchtlinge kommen ohne Vorkenntnisse und müssen Deutsch von Anfang an lernen. Eine bestimmte Anzahl von Flüchtlingen sind Analphabeten, die das lateinische Alphabet nicht kennen und Alphabetisierungskurse besuchen müssen. In der deutschen Integrationspolitik werden Deutschkenntnisse als Grundvoraussetzung für die erfolgreiche Integration verstanden. Die Metapher „Sprache – Schlüssel zur Integration“ wird in diesem Zusammenhang oft zitiert und hervorgehoben (Esser 2006) Das neue Integrationsgesetz, das im Jahre 2016 in Deutschland verabschiedet wurde, stellt genaue Bedingungen, die die Asylbewerber erfüllen sollen, um ihre Integrationsbereitschaft zu zeigen. Schon das Zuwanderungsgesetz vom Jahre 2005 hat die Integrationskurse eingeführt und das Integrationsgesetz hat einige Veränderungen bestimmt. In den Sprachkursen für Einwanderer wird nicht „Deutsch als Fremdsprache“, sondern „Deutsch als Zweitsprache“ gelehrt. Das hängt mit der Tatsache zusammen, dass die Einwanderer sich in der Sprache des Landes fortbilden, in dem sie leben (Grosche 2009).

Die oben erwähnten Integrationskurse bestehen aus einem Sprachkurs und einem Orientierungskurs. Der Sprachkurs umfasst 600 Stunden, der Orientierungskurs 100. Im Sprachkurs werden Themen aus dem Alltag behandelt, am Ende sollen die Teilnehmer den „Deutsch-Test für Zuwanderer“ auf dem Niveau B2 bestehen. Anschließend besuchen Zuwanderer einen Orientierungskurs über Normen und Werte in der deutschen Gesellschaft. Der Kurs schließt mit der Prüfung „Leben in Deutschland“ ab (BAMF 2017). Die Integrationskurse werden von dem BAMF angeboten. Während für die Deutschsprachförderung von Migranten und Flüchtlingen das Bundesmi-

nisterium des Innern (BMI) zuständig ist, liegt die Förderung der berufsbezogenen Deutschkurse in der Kompetenz des Bundesministeriums für Arbeit und Soziales (BMAS). Sowohl die allgemeine als auch die berufsbezogene Deutschsprachförderung werden vom Bundesamt für Migration und Flüchtlinge koordiniert und durchgeführt.

Die Deutschkurse für Beruf wurden bis jetzt in Deutschland auf einer Projektebene durchgeführt. In den Jahren 2007 – 2017 gab es Programm zur berufsbezogenen Sprachförderung, als ESF-BAMF-Programm bekannt. Es wurde von dem Europäischen Sozialfond (ESF) mitfinanziert und der BAMF war für die Erarbeitung des Konzepts und die Organisation zuständig. Die ESF-BAMF-Kurse werden auf dem gesamten Bundesgebiet angeboten und sind für Menschen mit Migrationshintergrund bestimmt. Der Kurs besteht nicht nur aus einem Berufsbezogenem Deutschunterricht, sondern auch aus einem Fachunterricht, Praktikum und den Betriebsbesichtigungen. In diesem Jahr, 2017 endet die finanzielle Unterstützung vom ESF und der Bund übernimmt die berufsbezogene Sprachförderung.

Die Bundesregierung hat in ihrem Programm „Gesamtprogramm Sprache“ die Sprachförderung in drei Phasen aufgeteilt. Die erste Phase ist die deutsche Alltagssprache, die in den Integrationskursen vermittelt wird und die Lernenden sollen das Niveau B1 erreichen. Die Deutschsprachförderverordnung vom Mai 2016 hat die 2. Phase - Berufssprache und Qualifizierung (B2/C1/C2) näher definiert. Berufsbezogene Deutschsprachförderung wurde damit zu einem Regelinstrument der Sprachförderung des Bundes. In den berufsbezogenen Sprachkursen sollen sich die Zuwanderer kontinuierlich auf den Arbeitsmarkt vorbereiten, neben den Sprachkursen können sie sich auch beruflich qualifizieren (Bundesregierung 2016).

### **Spezifische Merkmale des berufsbezogenen Deutschsprachunterrichts**

Der Trend im Wirtschaftsleben ist die Effizienz und dieser Zugang schlägt sich auch im Fremdsprachenunterricht nieder. In dem Bereich „Deutsch im Beruf“ konzentriert man sich auf Vermittlung der Sprache, die man im Berufsleben nutzen kann. Es geht um den Wortschatz, Basisgrammatik, Verständnis von Fachtexten, kommunikative Kompetenz am Arbeitsplatz. Auf der anderen Seite, die so genannte Wissensgesellschaft stellt neue Anforderungen an den Einzelnen, der im Berufsleben erfolgreich sein will.

Die überfachlichen Kompetenzen, die Schlüsselqualifikationen wie z.B. Flexibilität, Teamfähigkeit oder interkulturelle Kompetenz werden genauso wichtig wie die Fachkenntnisse (Kuhn, CH. 2007)

In den 90er Jahren haben sich die Wissenschaftler von dem Deutschen Institut für Erwachsenenbildung die Frage gestellt, „was bei aller Unterschiedlichkeiten in der Praxis der gemeinsame Nenner des berufsbezogenen Deutschunterrichts ist“. (Nispel, A., Szablewski-Çavus, P., 1996) und haben als erste die einzelnen Aspekte der berufsbezogenen Sprachunterricht analysiert. Seitdem kann man im Fremdsprachenunterricht die Tendenz beobachten „die Lernenden von Anfang an auf kommunikative Anforderungen der Arbeitswelt vorbereiten, d.h. Bezug zur Arbeitswelt herstellen, ohne jedoch berufs- oder fachspezifisch sein zu müssen“ (Kuhn, Ch. 2007). Die berufsbezogene Motivation und Zielsetzung sollten beim Fremdsprachenunterricht schon am Anfang des Sprachenlernens berücksichtigt werden. Es gibt Lehrwerke, die Deutsch für Beruf auch ohne Vorkenntnisse der Lernenden (Stufe A1- A2) thematisieren.

Am 1. Januar 2005 wurde in Deutschland das bundesweite Netzwerk und Förderprogramm „Integration durch. Qualifizierung“ (IQ) vom BMAS gegründet, um Integration von Menschen mit Migrationshintergrund zu verbessern. IQ bietet durch ihre Fachstelle Berufsbezogenes Deutsch – unter [www.deutsch-am-arbeitsplatz.de](http://www.deutsch-am-arbeitsplatz.de) nicht nur fachliche Diskussion zu diesem Gebiet, sondern auch viele praktische Tipps für Lehrende und Lernende. Ihre Erkenntnisse und Konzepte werden in Lehrwerken für berufsbezogenen Deutschunterricht einbezogen. Jeder deutsche Verlag für Fremdsprachenlehrwerke bietet heutzutage auch Titel zum Thema Deutsch am Arbeitsplatz (z.B. Verlag Cornelsen - Pluspunkte Beruf (A2 – B1), Langenscheidt Deutsch für den Berufseinstieg (A1 bis A2))

Das wichtige Thema, das bearbeitet sein musste, waren die Qualitätskriterien für den berufsbezogenen Deutschunterricht. Das Ziel war, den Kursträgern und Lehrkräften zu helfen den Deutschunterricht für den Beruf zielorientiert und auf einem hohen Qualitätsniveau zu gestalten. Um die Qualität der berufsbezogener Deutschkurse zu messen, erwähnt Iris Beckmann-Schultz (2009) drei pädagogische Prämissen – Teilnehmerorientierung, Bedarfsorientierung und Handlungsorientierung. Die Sprachbedarfserhebung am Arbeitsplatz hilft die einzelnen Themen zu bestimmen, Unter Handlungsorientierung versteht sie „Stärkung und Erweiterung der beruflichen Handlungsfähigkeit, indem die Teilnehmer ihre kommuni-

kative Kompetenz verbessern“ (Beckmann-Schultz, 2009).

Die Studenten an der Wirtschaftsuniversität in Bratislava lernen Deutsch als erste oder zweite Fremdsprache. In den letzten Jahren können wir feststellen, dass Deutsch hinter Englisch für die meisten Studenten die zweite Fremdsprache ist. In diesem Fall benutzen wir das Lehrwerk Perspektive Deutsch. Kommunikation am Arbeitsplatz A2/B1 von Lourdes Ros, Klett Verlag. Die Themen, die behandelt werden, kann man in zwei Gruppen einteilen – Arbeitssuche in Deutschland (z.B. berufliche Orientierung, Stellenangebote, Bewerbungen, Vorstellungsgespräch) und Kommunikation am Arbeitsplatz (z.B. schriftliche Arbeitsanweisungen verstehen, einen Termin vereinbaren, Telefongespräche annehmen). Im Übungsbuch können Studenten auch mit Fachtexten arbeiten, die authentisch sind und jeweils aus der Branche kommen, die in dem Kapitel beschrieben wurde. Die Studenten sollen lernen „Fachtexte zu knacken“, das bedeutet, wie sie sich Fachtexte über typische Grammatikstrukturen und den wichtigen Wortschatz erschließen können. (Ros, L. 2014). In jedem Kapitel des Lehrwerks wird eine der Schlüsselqualifikationen näher beschrieben. Studenten lernen dabei über die neuen Anforderungen am Arbeitsmarkt, die global sind und nicht nur Deutschland betreffen.

## Fazit

In der Zeit der großen Migrationskrise, die die Europa und vor allem Deutschland erleben, gewinnt der berufsbezogene Deutschunterricht an Relevanz und Wichtigkeit. Man kann das an den Schritten der Bundesregierung ablesen, die im Mai 2016 neue Verordnung bezüglich der beruflichen Sprachförderung erteilt hat. Die Bundesregierung benutzt die Prämisse „Sprache ist das A und O für die Integration in den Arbeitsmarkt sowie in die Gesellschaft“ (Bundesministerium für Arbeit und Soziales 2016) für Rechtfertigung ihrer Schritte hinsichtlich der berufsbezogenen Sprachförderung.

Obwohl das Konzept des berufsbezogenen Fremdsprachenunterrichts nicht neu ist, kommt es in Deutschland in den Vordergrund. Jedes Jahr gibt es neue Lehrwerke zum Thema „Deutsch am Arbeitsplatz“. Da der berufsbezogene Deutschunterricht nach den Qualitätskriterien bedarfs-, teilnehmer- und handlungsorientiert sein soll, versucht man diese Ansprüche zu erfüllen. Die Sprachbedarfserhebung am Arbeitsplatz steht am Anfang des berufsbezogenen Sprachunterrichts, d.h. welche Themen für die

sprachliche Vorbereitung relevant werden. Die kommunikative Handlungsfähigkeit der Beschäftigten wird betont und geübt – sich am neuen Arbeitsplatz vorstellen, formelle Telefongespräche führen, das Verstehen sichern, Nachfragen. Die Arbeitsaufteilung ändert sich heutzutage stark, deshalb ändern sich auch kommunikative Anforderungen, die immer komplexer werden.

Der globale Markt schafft höhere Ansprüche an Fremdsprachenkenntnisse. Die Aufgabe des Fremdsprachenunterrichts an Universitäten in der Slowakei ist, die kommunikativen Fähigkeiten der Studenten in Fremdsprachen zu entwickeln, damit sie später an ihrem Arbeitsplatz erfolgreich sein können. Das gilt nicht nur für Deutsch, sondern auch für alle Fremdsprachen, die bei uns gelernt werden.

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# POLYVALENZ ALS POTENZIAL DER LEHRE

LUDMILA SOLENSKÁ

## **Abstrakt**

*Jahrelang wird in der Gesellschaft sowie unter Lehrenden und Studierenden das Thema der Qualität unserer Hochschulen und damit verbundene neue Richtlinien für Hochschulmanagements und die Hochschuldidaktik diskutiert und analysiert. Inzwischen nimmt die Heterogenität der Studierenden und Studienkombinationen zu und die Universitäten stehen vor den neuen Herausforderungen, wie mit diesem Phänomen zurecht zu kommen. Es scheint, dass bei diesen Überlegungen nicht genügend Polyvalenz als Potenzial der Hochschullehre erkannt und genutzt wird. Unter dem Begriff Polyvalenz wurde in den Diskussionen bis jetzt meistens die Möglichkeit der Qualifizierung für verschiedene Berufsoptionen verstanden. Ein neuer Horizont öffnet sich bei der Erweiterung des Begriffs Polyvalenz auf Lehrveranstaltungen mit heterogenem Charakter, die man vor allem an kleinen und mittelgroßen Hochschulen mit fachlich breitem Studienangebot finden kann. Der thematische Schwerpunkt meines Aufsatzes bilden gerade Konzeption, Umsetzung sowie Reflexion polyvalenter Lehrveranstaltungen.*

## **Schlüsselworte:**

*Polyvalenz, Professionalisierung Heterogenität, Hochschuldidaktik, Peer Group Learning, Wissensbasis, Umstrukturierung, Studienabbruch*

**JEL classification: I 23, I 30**

## **Polyvalenz als vielseitiger Begriff**

Um näher den Begriff Polyvalenz zu erhellen, habe ich in dem deutschen Bildungssektor, der mir nah steht, nachgeforscht. Hier trifft man mit diesem zuerst auf dem Gebiet der Berufsbildung und Flexibilitätsforschung (Schutzenmeister 2002) und Polyvalenz wird verstanden als Fähigkeit der Arbeitsnehmerinnen und Arbeitsnehmer, sich ständig wechselnden Berufsanforderungen anzupassen (Stratenwerth 1969). In den 70er-Jahren war diese Nachfrage mit der fortschreitenden Technisierung und einsetzenden Rezession verbunden. Es ging um eine solche Gestaltung der Ausbildung, die mehrere Tätigkeitsfelder eines Berufes vermitteln und dadurch auch breitere Qualifikation anbieten könnte. Schon damals handelte sich um ein gestuftes Studienmodell, das heute in der Hochschullehre als Bologna-Reform bekannt ist. In dieser Hinsicht bezieht sich die Polyvalenz auf diejenigen Studiengänge, die breitere Kompetenzen aufbauen und dadurch ein breites Spektrum von Anschlussmöglichkeiten garantieren. Dies setzte in Gang heftige Diskussionen über das richtige Maß praxisrelevanter Lehre und das Verständnis von Professionalisierung. Polyvalenz wird also der Professionalisierung gegenübergestellt, obwohl

die universitäre Lehre nach wie vor gefordert ist, alle beide in sich zu vereinen und dadurch auch die berufsbezogene Qualifizierung anzubieten. Seit der Bologna-Reform gibt es in der Hochschulausbildung gestufte Studienstruktur. Nach dem berufsqualifizierenden Abschluss sollte ein polyvalent ausgebildeter Bachelor seine Bewährung auf dem Arbeitsmarkt finden oder sich in der weiterführenden Masterausbildung ein höheres fachliches und wissenschaftliches Niveau aneignen. Es gibt ja auch Berufe, wie zum Beispiel Lehrer oder Arzt, wo es fragwürdig ist, ob da ein gestuftes System Sinn hat. Eine Überbrückung könnten vielleicht bei Bachelorstudiengängen bereits integrierte schulpraktische und bildungswissenschaftliche Ausbildungsanteile (KMK 2005) anbieten.

Wenn man Polyvalenz auf der Ebene der Lehrveranstaltungen als das gemeinsame Lernen von Studierenden unterschiedlicher Studiengänge begreift, entsteht die Möglichkeit, gleichsam Flexibilität, Professionalität und inklusives Denken auszubilden. Das bedeutet, dass einzelne Veranstaltungen solche Qualifikationen anbahnen, die relevant für vielfältige Tätigkeitsbereiche sind und dadurch den Zugang unterschiedlichen Studierenden ermöglichen. Aus dem didaktischen Aspekt muss es zur Verschiebung hin zu einem Konzept von Inklusion kommen, was eine Akzeptanz und Zusammenführung von Verschiedenheit der Studenten bedeutet. Die Voraussetzungen, Berufswünsche und

damit verbundene Verarbeitung und Wahrnehmung der Inhalte in Anwendung auf spätere Tätigkeitsfelder sind bei den Studenten, die gemeinsam lernen, verschieden. „Polyvalenz wird damit zu einem Aspekt der als Heterogenität bezeichneten Uneinheitlichkeit einer Lerngruppe und stellt die Lehrenden vor die Aufgabe, diese Aspekte in ihrer Lehre zu berücksichtigen und im Sinne der Inklusion der Verschiedenheit Raum zu geben“ (Baumert 2012, Erk et al. 2012). Aus diesem Konzept geht es hervor, dass auch auf dem Gebiet der Organisation, Beratung, Betreuung und Erstellung der Prüfungsordnungen neue Herausforderungen und Maßnahmen seitens Universitäten zu erwarten und wünschenswert sind. Polyvalente Lehrveranstaltungen sind berufen, Flexibilität und Mobilität zu fördern, indem man Studenten solche Kompetenzen vermittelt, die sie auf diverse Berufsfelder beziehen können. Die Auswirkungen auf die Arbeit der Studierenden sowie Dozierenden sind unvermeidbar. Bei den ersten erwartet man eine effektive, frühzeitige und verantwortungsvolle Auseinandersetzung mit verschiedenen Berufsbildern, wobei sie die Heterogenität als eine Chance begreifen, in den gemeinsamen Diskussionen verschiedene Anwendungsgebiete zu zeigen und zu analysieren. Die Dozierenden sind wiederum verpflichtet, in der Vorbereitung, Gestaltung und Durchführung der Lehrveranstaltungen flexibel zu sein und dabei nicht zu vergessen, dass Erweiterung der neuen Horizonte nicht zum Profilverlust der einzelnen Studiengänge führen soll.

### **Polyvalente Lehre und Wissenschaft**

Wenn wir im Zusammenhang mit der Polyvalenz über die Wissenschaft sprechen, sollte diese im akademischen Bereich als die Befähigung zum forschenden, erkundenden und reflexiven Erarbeiten von Lösungsvorschlägen führen, die komplex und ergebnisoffen sind. Sprechen wir von zentralen Bildungszielen, haben wir mit den Phänomenen Sachkunde, Sachverstand, Urteilskompetenz und Kreativität zu tun. Wir unterscheiden vier Grundformen der polyvalenten Lehrveranstaltungen, von denen Studierende aus unterschiedlichen Studiengängen profitieren könnten:

1. Zusammen mit den Studenten, die grundständig fachwissenschaftlich orientiert sind, besuchen die Lehrveranstaltung auch Studenten, die perspektiv Regel, Methoden und Verfahren der Disziplin als Hilfswissenschaft lediglich brauchen und nutzen werden.
2. Eine Lehrveranstaltung dient nicht nur den

grundständig fachwissenschaftlich orientierten Studierenden, sondern auch denjenigen, die interdisziplinäres Denken benötigen werden, um tiefer in ihr eigenes Fach einzudringen.

3. Die grundständig fachwissenschaftlich orientierten Studenten sind zusammen mit zukünftigen Lehrern, die das Fach als Unterrichtsfach haben und beide profitieren aus derselben Lehrveranstaltung.
4. Eine Lehrveranstaltung, die Studierende aus allen Fachrichtungen besuchen. Da ergibt sich ja Frage nach dem Maße des Verzichts auf Vertiefung und Spezialisierung.

Jedem ist es klar, dass Gegenstand des akademischen Studiums Wissenschaft ist aber unter einer schon bestimmten Perspektive auf Anschlussoptionen, also auf die spezifische Zwecksetzung. Man muss schon während der Veranstaltung fähig sein, diese Optionen zu erschließen. Und es bleibt bei jedem, wie er mit den erworbenen Fähigkeiten und Wissensständen umgeht, ob er Polyvalenz auf seine spezifischen Ziele übertragen kann. Die ganze akademische Bildung ist auf die Pointe ausgerichtet, dass die Studierenden nicht für konkrete Arbeitsfelder und Berufstätigkeiten qualifiziert sind. Ihr wissenschaftliches Studium soll dazu führen, dass sie sich die verantwortliche Bearbeitung komplexer Frage- und Problemstellungen substantiell aneignen. Im Prozess von Modellieren, Erarbeiten und Entwerfen fließt nicht nur das zuhandene Wissen hinein, sondern es wird auch neues Wissen erarbeitet. Die bestimmte Wissensbasis, über die Studierende verfügen, muss mit kompetentem Einsatz von zielführenden Mitteln zur Realisierung einer Problemlösung kombiniert werden. Ebenso ernst soll man auch verschiedene Dimensionen von definierten Kriterien bewerten können und dazu fähig und bereit sein, über Gegebenes hinauszudenken.

### **Sinnhorizonte der polyvalenten Lehre**

Im Sinne des Begreifens vom spezifischen Charakter wissenschaftlichen Wissens und Arbeitens unterscheiden sich die herkömmlichen Lehrveranstaltungen von den polyvalenten nicht. Es handelt sich um eine reflektierte Auseinandersetzung mit dem jeweiligen Fach und seinen spezifischen Formen der Erschließung von Sachverhalten. Was schon die konkreten Ziele des Studiums betrifft, findet man allerdings unterschiedliche Anforderungen und Durchdringungstiefen. Wenn man sich auf Wissenschaft epistemisch orientiert, ohne fundierte methodische und methodologische Kenntnisse sowie Nachvollzug

systematischer Beschreibungen, Erklärungen und Geltungsbedingungen funktioniert es nicht. Wenn professionelle Tätigkeitsfelder im Zentrum der Aufmerksamkeit stehen, ist nach Rhein (Rhein 2013) Verfügungswissen über Ressourcen und Prozesse im Hinblick auf die geschickte Produktion von Artefakten oder auf zielführendes effizientes Verrichten erforderlich. Die Orientierung an intellektuellen Haltungen benötigt die Arbeit an Antwortvorschlägen auf die Fragen nach den Formen und Ermöglichungsbedingungen individueller oder kollektiver lebenspraktischer Grundlagen. Erwerb von profundem Wissen wird adäquat arrangiert – also Raum zur Reflexion und Räume zur Integration von Lernerfahrungen im Studium gegeben. Wenn man Binnendifferenzierungen vornimmt oder explizit an die unterschiedlichen Zwecksetzungen der jeweiligen Studiengänge anknüpft, können diesen Raum gerade polyvalente Lehrveranstaltungen anbieten. Im Rahmen des Studiums müssen die Studierenden den Eindruck haben, dass ihnen eine kohärente Bildung angeboten wird, wo konkrete Verschränkungen und Differenzen transparent wahrgenommen werden.

### **Peer Group Learning**

Typisch für die Studierenden im ersten Semester ist die Tatsache, dass sie über unterschiedliches fachbezogenes Wissen verfügen. Das betrifft auch ihre Fähigkeiten zum selbstorganisierten Lernen. Diese Heterogenität zeigt sich am stärksten gerade in polyvalenten Lehrveranstaltungen. Ein geeignetes Mittel zur Verbesserung der Vorlesungen und Aktivierung der Studenten scheint das didaktische Konzept von Peer Group Learning zu sein. Es geht um Diskussionsblöcke in den kleinen Gruppen von Studenten während einer Vorlesung, was in den Vereinigten Staaten seit Jahren eine bewährte Praxis ist. Es hat sich gezeigt, dass dieses Konzept eine der erfolgreichen Methoden gegen vorzeitige Studienabbrüche ist. Studierende sind aktiviert, indem man sie interaktiv in Lehrveranstaltungen einbindet. Studenten gleicher Qualifikationsstufe besprechen in kleinen Gruppen Lösungsmöglichkeiten der von dem Dozierenden gestellten Frage, was zum tieferen Verständnis des Problems führt und positive Auswirkungen auf Prüfungsleistungen aufweist. Es entspricht auch der Tendenz zum lebendigen und nachhaltigen Lernen. Lernen bedeutet dabei Selbstlernen, wobei die Lernenden „Eigentümer ihres eigenen Lernprozesses sind, Emotion und Kognition werden miteinander verknüpft (Arnold 2012, Schüssler 2011)“. An einigen

deutschen Universitäten, die Peer Group Learning in polyvalenten Veranstaltungen realisieren, haben sich zwei 10-minütige Diskussionsblöcke in Kleingruppen von 4 Studenten bewährt, die in jeder Vorlesung eng zusammen sitzen. Um fachfremde Themen zu vermeiden, muss man die Gruppeneinteilung willkürlich durchführen, damit Freundschaftsbeziehungen ausgeschlossen werden. Am Semesterende erfolgt die Gruppenprüfung, wobei jedem Studenten 15 Minuten zur Verfügung stehen. Die Prüfungsatmosphäre simulieren Studierende eigentlich schon innerhalb der Vorlesungen, wenn sie Zeit zum Reden bekommen. Diese Diskussionsblöcke sind auch von Vorteil, indem sie ruhigeres Auditorium sichern, weil die Studierenden kein Bedürfnis haben, während des Inputreferats des Dozierenden miteinander zu sprechen. Beim Austausch konzentrieren sie sich auf das Erlernte, sie hören besser zu. Da die Prüfung als Gruppenprüfung realisiert wird, ist sie für Bachelor nicht so stressig wie die Einzelprüfung. Bei Masterveranstaltung kann man schon auf unterschiedlichen fachlichen Vorkenntnissen bauen und dadurch viel höheres Niveau bei den Problemlösungen erreichen. Für Lehrende bedeutet dieses methodische Verfahren zum einen mehr Vorbereitungsaufwand und gewisse Umstrukturierung der Vorlesungen, zum anderen das Gefühl deutlich interessanterer, angenehmer, abwechslungsreicher und effektiver Arbeit und Ergebnisse.

### **Zusammenfassung**

Polyvalenz ist nicht nur im Zusammenhang mit den Forderungen des Arbeitsmarkts zu erläutern. Viel mehr entspricht das ganze Konzept der aktuellen hochschuldidaktischen Entwicklung, die auf die Frage des Umgangs mit einer zunehmend heterogenen Studentenschaft eine Antwort sucht und zwar vor dem Hintergrund der Dynamisierung von Gesellschaft. Polyvalente Lehrveranstaltungen sind einer der Wege, wie man Studierende auf die Anforderungen der interdisziplinär organisierten Wissenschaft effektiv vorbereiten kann. Der Zugang zu den Inhalten soll dabei multiperspektive und generalisierende Merkmale aufweisen. Dadurch öffnet sich der Raum für Förderung der individuellen Kompetenzen im Bereich performativen Wissens. Dieses handlungsorientierte Wissen hat in den Zeiten des hohen Innovationsbedarfs eine steigende Bedeutung. Nach Wolff (2008) soll das anwendungsbezogene Wissen gestärkt werden, weil gerade dieses das Überleben der Gesellschaft in Zeiten der Veränderung garantiert und gleichzeitig fähig ist, bestehende Strukturen zu transformieren.

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**II. SECTION  
OF INTERNATIONAL RELATIONS AND POLITOLOGY**

# AN APPROACH TO EDUCATION OF THE OFFICERS BY COMPETENCIES

ANDREA BRICHOVÁ

## **Abstract**

*An education by competencies is common in civil sphere and it starts to be noticed in military education. It is necessary to follow trends in the education and combine them with requirements of army daily life and its needs. Combination of these aspects should form military education and make it effective, economical and also its quality. The education of military students of University of Defence is the beginning of education of military officers recruited from civilian sector. Armed forces must be also attractive for its applicants to be competitive. Soldier in his active duty is educated for the whole time of his career so education must be developed all the time. It is not enough to fulfil qualification requirements before joining Army already.*

## **Key words**

*education, officer, competence, career*

**JEL classification: I21, J24**

## **INTRODUCTION**

Competitiveness and finance are two key areas that effect everything else. Just like any other organization The Army of the Czech Republic needs to be attractive for potential candidates throughout the labour market. It must be an employer who will be respected, offering interesting job opportunities and adequate financial reward. At the same time, it is necessary to respect the budget defined by the political representation on its management, and it is therefore desirable to constantly seek effective and economical ways for its operation. One of the ways to achieve these criteria is to prepare an adequate education system for the employees that will be attractive both for the job seekers and existing employees, while leading to future cost savings in the form of high-quality and specialized staff, which then leads to the entire organization value increase.

Education accompanies every soldier throughout his whole career. One of the components is the fulfilment of the qualification prerequisite, which means minimum academic education in form of the A-levels. For lower officers the minimum qualification prerequisite is the bachelor degree. During the service, the soldier is sent to supplement the required education, such as language education, specialized education and career education, based on his post requirements. Education is a strong element of organizational culture in the Army of the Czech

Republic, which affects not only the inclusion in its structures, but also career growth, rewarding and commitment to the soldier's entire career. Segmenting the education system according to current needs educates soldiers in the areas that are necessary for the duties of their service, increases the knowledge potential of the organization as a whole, while saving money as the soldiers receive the education they really need to perform their duties. The range of educational activities in the military environment is very extensive and concerns the entire organization, so that a good educational institution is able to positively influence all of its members.

One of the ways to adequately handle the finances and at the same time to make the most of their spending is to invest in students of the University of Defence who are assigned to the services of the Army of the Czech Republic at the lowest officers positions after successfully completing the military studies. Often directly to command positions immediately after graduation. These commanders can instantly convert acquired knowledge into practice and are able to influence the whole from the bottom, that is the way of subordinate soldiers. Thus, positive externalities goes through the entire organization, it is necessary to adequately prepare the officers in order for this to happen. Due to their professional placement, it is important that they are capable commanders, who are capable of leading their subordinate soldiers.

## A COMPETENCY APPROACH

*Nothing can be done without the knowledge,  
the devotees and the enthusiasts.*

*Tomáš Baťa, Jr.*

Since the eighties of the last century, we have been able to face a discussion about the competences. Primarily, competencies are associated with management, but their impact is now evident throughout many industries. The reason why the attitude to work or education is judged by competencies is that the appropriately chosen competencies help to detect the differences between the average and the excellent result. In order to make objective assessments through competencies, these competencies must be appropriately chosen which means that they must be precisely defined for the specific environment where we want to apply them, since the competence with the same name may have different characteristics in different environments. In practice, such an approach facilitates the recruitment of the right people for the appropriate jobs, helps to use the stewarding system more objectively and efficiently. At the same time, it is a tool to assess the readiness to achieve strategic goals, on the other hand it is also an opportunity to target the development of people according to the strategic plan. Using competencies, it is therefore possible to optimize the career development of employees. For this reason, the approach by competencies is transferable across various sectors. Competencies represent a complex set of skills and amount of knowledge combined with certain attitudes, experiences and motivations (Kubeš, 2004).

Inconsistency in the competence approach is manifested by the infinite number of definitions of the term itself. For example, Richard Boyatzis describes competence as "There are several underlying characteristics of competences such as motives, knowledge, skills and social roles." Spencer and Spencer present this definition of "5 characteristics as hidden and visible part of the competencies shown in the iceberg model". David Dubois summarizes competence as "Competency is the employee's ability to meet a job requirement by producing the performance output." Each author presents an original version of what the competence is. The quantity of various definitions show that this is a very important topic. And it also proves that every area where we want to use the competency approach is unique and requires specific treatment. Competencies therefore help any organization solve problems: (Bozkurt, 2011)

1. To clarify workforce standards in organization and expectations;
2. organization of individualities, teams, managers according to organizational strategy;
3. creation of empowerment, responsibility and organization of managers, team members, and employee development (Bozkurt, 2011).

## THE MILITARY ENVIRONMENT AND ITS SPECIFICATION

The primary determinant of the military environment is its mission. The Army of the Czech Republic (ACR) is the power tool of the state to guarantee the sovereignty of the country. Therefore, it has its own specific outputs such as the ability to conduct combat operations.

Requirements for military commanders and officers are highly challenging, and therefore, they have as a decisive part the preparation managerial function to move them to a higher level of management. The command is used and the hierarchical structure is maintained in the army.

At the same time, the army, as well as the ministry of defence, is the organizational component of a state that operates on the basis of the needs set by our political representation and not according to the needs of the market. It is very difficult to measure efficiency and effectiveness in this area. The legal apparatus also strictly defines what is allowed in this system and what is not in this environment (Jaroš, 2012).

Also within the army is the management, which is oriented as follows:

- to formulate strategic concepts of military development due to any military doctrine;
- the creation of organizational structures with respect to the criteria of required operational (combat) abilities, economy and efficiency;
- Army planning system in relation to the balance of personnel, material and financial resources;
- decision making with regard to ethical, economic and environmental considerations;
- the projection of personnel strategy into human resources management, including the formation of desirable ways of leading people and social communication in military units.

The theoretical framework defines the duties of the commander strictly. His responsibility is to manage all activities using also military armoured vehicles

and so on. The most demanding command capabilities must be demonstrated in extreme conditions, such as foreign operations, where the commander also bears full responsibility for the lives of his subordinates. Demands on commanders are enormous even for novice commanders after completing military higher education. These young officers are classified according to the needs of the Army of the Czech Republic to subordinate units and units. The commanding officer is put into practice where his subordinates can serve for decades and have many practical experience with the life of the military unit. This is one of the most difficult steps for young officers, as the reputation they have in their units is derived from their command (Jaroš, 2012).

Superiority and subordination are determined by functional division and also by military rank. Soldiers with a higher military rank are obliged to require to comply with military discipline soldiers with lower ranks. This brings young officers to situations where they are obliged to command soldiers from other troops. An officer who is able to lead people well has an appropriate attitude that gives respect for his speech and facilitates mutual military communication. Commander's behavior is grounded in the basic doctrine as well as the behavior of his subordinate soldiers. The commander should be an example for his subordinate soldiers and fulfill the assigned tasks with the least possible loss. This standard must be fulfilled under all conditions. The very most demanding situations require the utmost co-ordination of the commander and his unit, where the competence to lead people can be a means of achieving the task. All military behavior regulated by military regulations takes on a specific dimension only in the practical use of concrete soldiers. Managing competency to lead others is the key to effectively putting theoretical demands into practice (Základní řád Ozbrojených sil ČR, 2012).

An average of 200 students of the University of Defence graduated in each academic year between 2010 and 2014. These students of the Military Studies are already in service and are studying in the Corps of Honour Officers, when they are entitled to salary, transport, are given free accommodation and food allowances, fittings, etc. These benefits of military studies are one of the aspects that make military studies attractive to their aspirants, but at the same time they are a necessary cost to be spent on the military budget and must therefore be used efficiently. It should be an interest of the whole resort

to make the training of military students as high as possible. Positive impacts will be reflected throughout the sector. The development of human potential is always an investment that will reimburse the costs incurred. Quality staff is just the source that influences all other resources that are being used and is therefore so essential.

**Tab. 1** *The Number of military graduates of the University of Defence*

The Number of graduates of 2014	242
The Number of graduates 2013	227
The Number of graduates 2012	219
The Number of graduates 2011	179
The Number of graduates 2010	170

*Source: Přehled absolventů, informační systém Univerzity obrany, customization*

Graduates of military studies who enter the structure of the ACR are already equipped with a Officer Career Course, a language requirement, which consequently saves the cost of units, where graduates are assigned. At the same time, all of these graduates as potential future commanders should lead their units as well as by their personal example. Ability to lead subordinates should also include moral principles and values, the ability to motivate others, to be able to recognize the mistake and the ability to cooperate and work under pressure. All ACR officers should be equipped with these skills at the theoretical and partly practical level. It is precisely the military education that offers the possibility to modify the curricula precisely according to the actual military needs and to put into the army structure the most professional and prepared soldiers. It is possible to create a full military competency model that meets the standards of military practice, while also building up a platform for individual military expertise or even for individual units. So well prepared standards could make easier personnel work and increase the quality of soldiers' selection and training.

## **PERSONAL MANAGEMENT AND ORGANIZATIONAL BEHAVIOR**

The most important component of each organization is its human resources, characterized by certain personality traits, competencies and motivation. With their help, they subsequently achieve their goals

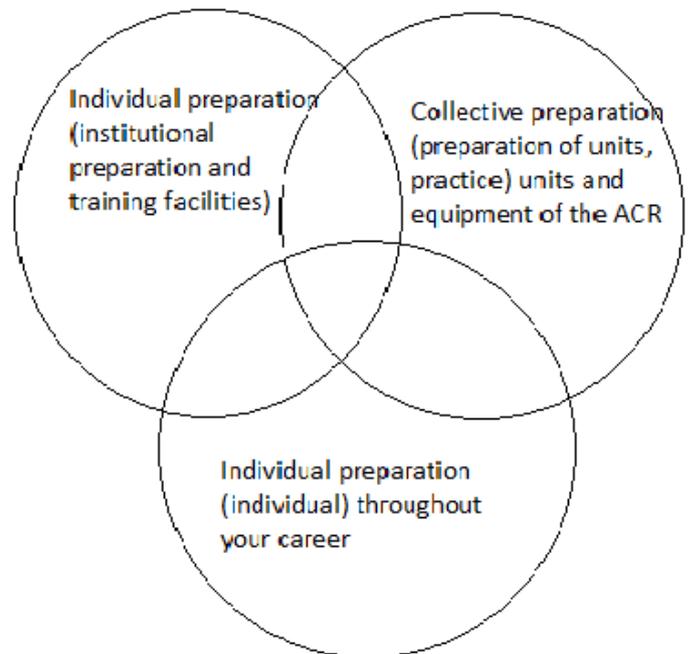
and fulfill their purposes and intentions (Mateiciue, 2008). As well as running the whole organization, the concern about personnel management in the Army of the Czech Republic should fulfill three basic criteria, namely to be effective, economical and efficient. Personnel management, staff recruitment, retention, and the creation of consistent conditions for his personal and professional development are unconditional due to his mission, which is the defence of the Czech Republic. The most important element is care of human resources. Emphasis is placed on the capabilities of the armed forces to provide defence and achieve the country's political and military ambitions and, last but not least, the fulfilment of the roles and functions of the armed forces. Abilities are perceived by the White Paper as being capable of effectively acting in crisis situations and war conflicts. Organizational behavior interferes with the entire organization within the corporate culture and creates feedback activity. All aspects of corporate culture, including education, affect the processes and values in the organization by blending together all of them. One of the features of corporate culture is, among other things, its reflection in disposition, thinking and behavior, but its effect on human consciousness and unconsciousness where it manifests itself. It should be noted that it is a product of past activities and at the same time a limiting factor for future activities. Corporate culture influences both external and internal influences. Among the significant external influences that directly affect the ACR we rank: the rate of market feedback, competition, market position. The position on the market is exemplified, for example, by an amendment to the Army Law, which will allow the wider public to participate in the defence of the country, with the effort of up to thirteen hundred active advances to reach up to five thousand of these members. Just participating in active advancements is also one of the ways to get more adepts for service in the Army of the Czech Republic (Pheipher, Umlaufová, 1993).

## MILITARY EDUCATION

Military training can be divided into three core segments, which concern all professional soldiers and accompany them throughout their service in the Army of the Czech Republic. These are Individual Preparation, Collective Preparation, and Standalone Preparation. The preparation of an individual involves the preparation of a soldier according to the requirements of his / her place of employment. Collective

preparation is uniform for all soldiers and includes, for example, medical preparation, topographic preparation, shooting preparation, bi-military case, etc. that is carried out separately within the military units. Headquarters of Training - Military Academy in Vyškov, where career courses take place. Separate training is an essential part of the above-mentioned units, where responsibility for self-education and skill development lies with every soldier.

**Pic. 1** Military professional training (customization)



Source: *Bílá kniha o obraně*, 2011.

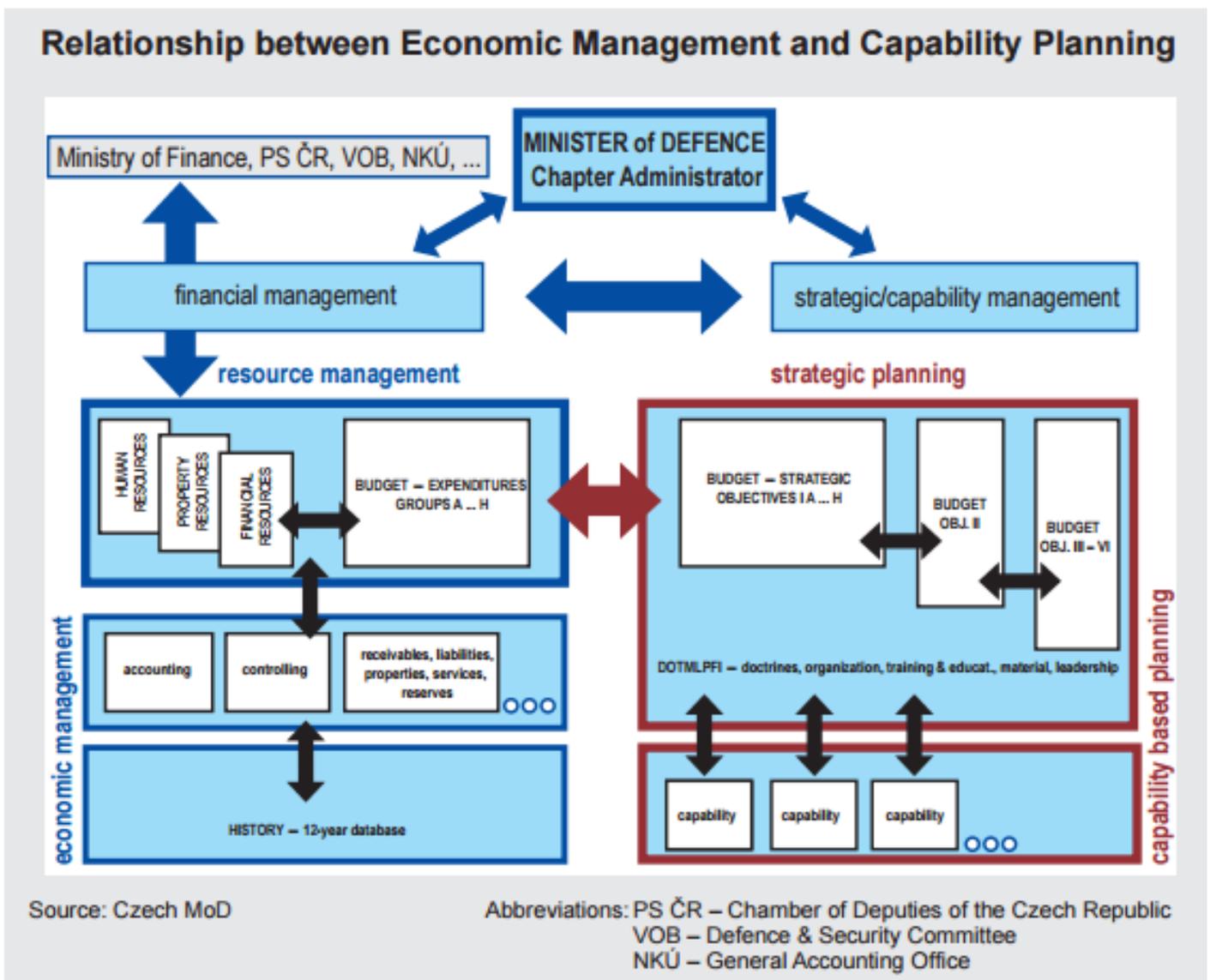
Offices in the Army of the Czech Republic are defined by two basic units within education; these are the qualification requirement and the qualification prerequisite. This information is summarized in the RMO 8/2010 Principles of Creation of Systematized Sites and in RMO No. 7/2010 of the Bulletin the principles of construction and systematization of MO units' organizational units. The qualification prerequisite is the education provided for the performance of a service at a given place of employment. It includes education provided within the framework of school education (certificate of education, A level, university education Bc. / Mgr. / Ing.). The qualification requirement is specified by the service post, it is a language requirement, a career course, and professional courses. The preparation of students of the University of Defence should be preparation of soldiers already fully equipped for positions within the army structure.

Education is a duty of every soldier. Specifically, it is defined in paragraph 48 (1) of the Act on Armed

Forces, where in point (e) it is stated that a soldier is obliged to increase his / her professional knowledge and to deepen his / her qualifications, to take care of his physical fitness. Training of military personnel is also devoted to the White Paper on Defence. This document speaks about the state of the army and defines in strategic planning also the development of skills and abilities, which must be in line with the economic management of the department. Taking care of human potential is the number one priority. The Ministry must be perceived by the public as an attractive employer to be competitive, as is the case with military schools, which are partly financed by the Ministry of Defence budget and part of the budget of the Ministry of Education. And in this respect, the ministry should behave just like an economical firm and raise the best of its future em-

ployees. The implementation of adequate education is also one of the objectives of personnel management that is linked to career management. Military training takes place at two departmental schools. The Ministry prepares future military professionals at Military High School and Higher Technical School of the Ministry of Defence in Moravská Třebová and the University of Defence in Brno. Military students of the University of Defence are already studying as occupational soldiers and are getting ready for service in the Army of the Czech Republic, so the cost of their education is also covered by the budget of the Ministry of Defence. To illustrate the coherence of economic governance and capacity planning, the following figure is used:

**Pic. 2** Scheme of relationship between economic management and capability planning



Source: Bílá kniha o obraně, 2011.

The ACR allows its soldiers to train according to their needs on the basis of a concluded agreement based on Act No. 221 of 1999 on Armed Forces. The agreement allows the soldier to deepen his or her education. The soldier undertakes to remain in service for the agreed period of time after he / she has completed the studies, or to cover the costs of the study. Thus, the funds spent are returned either by increasing the educational level of military professionals or are compensated by the reimbursement of the costs incurred by the soldier with the state before the beginning of the study. Similarly, the provision of study leave for soldiers and the financial details of the study are treated. The soldier who decides to study must obey No 265 of 5 November 1995, which provides details of studies during the military service. If such a soldier is sent to study, the Ministry must create conditions for his study on the basis of Decree No 264 of 5 November 1999 on the granting of study leave to soldiers. The scope of the study leave is here. The study must be beneficial for ACR, otherwise it is not realized.

## **THE COMPETENCY TO LEAD OTHERS**

The American army has in its doctrines a richly established Experience with the leadership. The US Army considers leadership to be the most important aspect of the military profession. Good leadership is a success for the whole army, both today and in the future. Based on the challenges, circumstances, and peculiarities of the environment the soldiers face, the requirements for the leadership character also change. These are in particular decentralized operations requiring high-quality leaders capable of all aspects of command. Unfortunately, there are no predefined patterns of behavior for the challenges faced by combat leaders in the combat effort, and it is always necessary to adapt to the actual needs of the situation. This involves adapting thinking, forming the unit and working conditions to the specific needs of the task. It is necessary to use mainly adaptability, innovative ways of solution, willingness to take risks. General Omar Bradley sees leadership as: "Leadership in a democratic army means firmness, not harshness; Understanding, not weakness; Generosity, not selfishness; Pride, not egotism. "Being a leader means personal devotion, constant self-education, self-esteem, and passion for one's own unit and soldiers. At the same time, the leader's behavior is not just about issuing orders but is about gaining respect, leading by ex-

ample, creating a positive climate, inspiring others, and increasing team excellence (ADP 6-22, 2012)

The presented experience of US colleagues shows that a competency approach is applicable and justifiable in a military environment. Their combat experience is greater than the experience of the ACR, but also the range of personnel activities and work with human resources represents a possible theoretical basis given its scope for implementing this approach in the ACR. Of course, the competency to lead others differs with the level of command we are in. So the delineation of the competency for the University of Defence graduates will be different from the competency that should be held by unit commander, battalion, task force, and so on. The competency to lead others for the graduates of University of Defence should be a basic platform to enter the army structures and each graduate to the position, which held in the service will extend this skill through further career courses. The competency to lead others should be included in a full competency model that would depict some military expertise, a specific service site, or the requirements of a dedicated unit such as the 601st Specialist Task Force General Moravec. The possibilities of using these models are broad and help to improve the quality of all processes with human resources.

Leader helps his unit to share its shared values, achieve the set goals, and perform the assigned tasks despite the obstacles that may arise and support them at work. At the same time, the leader listens to his subordinates and is able to maximize their potential. Students should, in the context of competency to lead others learn that the leadership of people is formally anchored in the requirements of their function, but it is also an area, where they should develop themselves. Being a commander of a military unit means not only to take responsibility for this unit and to fulfil the tasks assigned to it by the superior but also to take responsibility for its subordinates. The commander should be for his subordinate soldiers the authority they can look for, the closest superior to whom they can trust, and the human support that will help them carry the duties of often difficult service and motivate them to ever better performances.

## CONCLUSION

A competency approach is used in both the civilian and the military sectors. In the military environment, we are only acquainted with this approach in the Czech Republic. This approach is abundantly mentioned by the US Army in its doctrines. It demonstrates the viability and applicability of competencies in the armed forces. In addition, with its scope, deployment and facilities, the US Army is at a higher level than the Czech Army. Therefore, its knowledge can be used as a theoretical basis for implementing a competent approach to the ACR.

A competent approach to education is an opportunity to link the entire education system in the ACR, i.e. schooling in military schools, career preparation and training. The unification of the educational requirements of military schools and the headquarters of training - the Military Academy in Vyškov, which provides career and professional courses, will make it possible to streamline the training of military professionals, avoid duplication and thus save the money spent on education. Education brings soldiers with all their service in the army, so it is an area that deserves attention while bringing many positive effects. Educational potential increases the rank of the entire organization and helps to improve all work processes.

The training of young officers can be shaped according to the needs of the ACR from the outset and reflect the needs, according to the current situation. Graduates of the University of Defence, in abundant numbers immediately after completing their studies, come to subordinate units for commanding functions, so the merit of competence in leadership is unambiguous. In addition, these officers are able to pass on the theoretical knowledge they have acquired at the university immediately to their subordinate soldiers, which has a positive effect on the entire organization, namely ACR. Due to the character of the Czech Armed Forces, the ability to command and lead subordinate units is a matter of course, but it is necessary for the commanding officers to equip them with the necessary knowledge to adequately fulfil this need. It is also a saving of the funds of the resort, as the funds spent on the education of the students will be spent precisely on the formation of the knowledge that soldiers need to fulfil their functions. Basic knowledge of competency to lead others can be further developed by training courses, according to the needs of individual leading positions, which supports the continuity of military education.

Competitiveness is an area that affects the ACR and must reflect and respond to the externalities of the market. The very attractive preparation of future military professionals is what the ACR can offer to its job seekers. Moreover, the educational potential increases the value of the organization and moves all other resources, which again brings benefits to the entire structure of the Czech Armed Forces.

Competency area is a new approach that can be applied in ACR and has great potential for its use. Appropriate use of this approach is represented by the University of Defence where, within its curriculum, competency in the education of students, future officers of the ACR can be used and on this basis to define other starting points for career education in MO.

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# RURAL DEVELOPMENT PROGRAM IN THE PERIOD 2007 - 2013 - EVALUATION OF THE IMPLEMENTATION OF INTERVENTION III.

## 1.3 A) SUPPORT OF TOURISM

PETR BURDA - MARKÉTA KALÁBOVÁ - BLANKA HAVLÍČKOVÁ

### **Annotation**

*The main aim of this article is to assess and evaluate the implementation of intervention III. 1.3. Support of tourism within Rural Development Program in the period 2007 – 2013 in the individual regions of the Czech Republic. Individual projects were assessed on the basis of the quantity of successfully approved grant applications and the targeting on areas of intervention and the amount of funds expended in each region. Based on the analysis it is clear that the vast majority of the projects were focused on building hiking trails. South Moravian Region takes the lead in the total number of successful applications approved, however, the greatest financial volume of the projects were awarded to the Ústí Region. The absolute majority of the total allocation has been distributed among Ústí, Central Bohemia, Olomouc and South Moravian Region. In contrast, the smallest number of projects and thus the least financial support received Moravian - Silesian and Pardubice Region.*

### **Key words**

*Regional Policy, Rural Development Program, Tourism,*

**JEL classification: Q26, R51, H81, R58, L83**

### **INTRODUCTION**

The goal of this paper is to evaluate the subsidies provided under the Priority Axis III. 1.3. a) hiking routes, bridle paths, wine-growing routes of the Rural Development Policy for 2007-2013 in individual regions. Data for methodological processing was obtained from the database of approved applications registered by the State Agricultural Intervention Fund and the Ministry of Agriculture. Data analysis was performed using the IBM SPSS statistics program. The projects will be assessed on the basis of the number of successfully approved applications, their thematic focus, the average amounts drawn for the project and the amount of funds drawn in each region.

### **1. RURAL DEVELOPMENT PROGRAM 2007 – 2013 – BASIC INFORMATION**

The Czech Rural Development Program was the basic document for drawing EU support for rural development in the Czech Republic for the last programming

period 2007-2013 and ensuring the operation of the European Fund for Rural Development (EAFRD) in the Czech Republic. The Rural Development Program of the Czech Republic was based on the National Strategic Plan for Rural Development of the Czech Republic (NSPRV) and one of its priority objectives was to contribute to the development of the Czech countryside on the basis of sustainable development, improvement of the environment and reduction of negative impacts of intensive agricultural management. The program was also aimed at creating conditions for the competitiveness of the Czech Republic in basic food commodities. The program promoted the diversification of economic activities in the countryside to develop business (support for tourism, rehabilitation and development of villages, support for establishing businesses and creation of new jobs, reduction of rural unemployment rates and strengthening the citizenship and solidarity of the rural population).

The Rural Development Program of the Czech Republic for the period 2007-2013 was prepared in accordance with Council Regulation (EC) No 1698/2005 and the Implementing Rules of that Standard. This program has been specified in accordance with Council Regulation (EC) 1698/2005, Article 15 of the strategy in the individual axes set out in the National Strategic Plan for Rural Development into the Implementation

Level, ensuring its effective implementation. The rural development program measures have been designed with and in close connection with the Lisbon Strategy, in all its areas, i.e.:

- Knowledge-based society
- Internal market and business environment
- Labour market
- Sustainable Development

Rural Development Program 2007 - 2013 provided funding in 4 priority axes. The first axis focused on improving the competitiveness of agriculture and forestry, while the second priority axis focused on improving the environment and the landscape. The third supported sector was the quality of life in rural areas and the diversification of the rural economy. In the fourth priority axis, called Leader, grants were provided to support the implementation of the local development strategy and the cooperation of local partnerships (SAIF, 2015).

The Managing Authority established in this case is the Ministry of Agriculture, the Intermediate Body of the Rural Development Program is the State Agricultural Intervention Fund (SAIF) and the Paying Authority is the State Agricultural Intervention Fund.

**Table 1: Priority Axes of the Rural Development Program 2007 – 2013**

<b>Axes I:</b>	Improving the competitiveness of agriculture and forestry
<b>Axes II:</b>	Improving the environment and landscape
<b>Axes III:</b>	Quality of life in rural areas and diversification of the rural economy
<b>Axes IV:</b>	LEADER

Source: Own processing

### 1.1. Axis III. in the Rural Development Program of the Czech Republic for the period 2007-2013

Axis III. The Rural Development Program of the Czech Republic for the period 2007-2013 includes a somewhat specific status within the European Rural Development Fund (EAFRD); in contrast to other priority axes, its intervention measures are aimed at improving the quality of rural life through diversification of rural economy. This diversification is to be achieved

through non-agricultural activities, for example by supporting tourism, developing rural tourism, cycling, recreational and rehabilitation rides, water tourism, sporting and recreational activities in areas with natural values, recreational potential, cultural heritage and living traditions and more. (SAIF, 2015)

Within the framework of Axis III of the Czech Rural Development Program, three main priorities were set for the period 2007 - 2013:

#### I. **Creating employment opportunities and promoting the use of renewable energy sources (50% of priority axis III)**

This priority has been focused on creating new jobs and thereby ensuring a higher income level for rural residents by developing and diversifying rural activities and promoting rural tourism. Another objective was to ensure fulfillment of the Czech Republic's commitments in the field of renewable energy use.

#### II. **Growth conditions and quality of life in rural areas (48% of priority axis III)**

The aim was to create growth in rural areas, improve the amenities and appearance of villages, public spaces and strengthen the cohesion of the population with the local environment and the rural heritage. Emphasis was also put on securing the development of rural infrastructure with the aim of developing small and medium-sized businesses and improving the environment of rural settlements.

#### III. **Education (2% of Priority Axis III)**

The aim was to contribute to a higher level of education and employability of the rural population in the labor market by developing guidance and education and increasing the use of information and communication technologies.

#### 1.1. Action III. 1.3 - Support for tourism

Tourism support was divided into two sub-groups: a) hiking trails, wine-growing trails and bridle paths and b) accommodation, sports (SAIF, 2015). Walking routes are designed to connect, mark and enhance hiking trails. Wine trails in the Czech Republic create a unique regional network of cycling routes in particular to connect the picturesque wine regions and the monuments of the region. The purpose of bridle paths is to make available hiking trails.

Both measures were aimed at developing activities related to the diversification of the rural economy of tourism development, especially in connection with the utilization of the natural and cultural heritage of the regions. These activities followed the general support of regional tourism (services, tourism information centres, marketing at national and foreign trade fairs).

Support was provided for the construction of recreational infrastructure as well as for small-capacity accommodation, including meals and recreational facilities (swimming pools and swimming pools for public use, including facilities, playgrounds, riding halls and other recreational facilities. Water sports and skiing (except ski lifts and lifts), building and marking of hiking trails, wine paths, resting places, bridle paths, including the use of animals in the tourism industry and purchases and planting of greenery.

Projects were implemented in the municipality of up to 2,000 inhabitants in the whole Czech Republic. Beneficiaries of the aid were agricultural entrepreneurs - natural and legal persons, non-agricultural entrepreneurs only in case they have started their activity or had a shorter than two-year history, as well as non-profit organizations (including interest groups and associations) with legal personality.

As regards the form and amount of the aid, it was a direct non-repayable subsidy, the maximum aid amount was 90%, or b) the maximum amount of aid differed according to the enterprise (small, medium and large enterprise) ranging from 49% 60%, the minimum total eligible costs for the project amounted to 50 000, - CZK. The EU contributed 75% of public resources to the implementation of the projects, the Czech contribution was 25% of public resources.

**Table 2: Priorities, Objectives and Actions of Axes III**

Priority	III.1. Creation of employment opportunities and promotion of the use of renewable resources of energy	% of the axis
Aim	Create jobs and ensure a higher income level of rural population by developing and diversifying rural activities and supporting rural tourism, ensuring the fulfilment of the Czech Republic's commitments in the field of renewable energy use	50 %
Action	III.1.1 Diversification of non-agricultural activities	22,5 %
	III.1.2 Support for business start-ups and their development	15 %
	<b>III.1.3 Support for tourism</b>	<b>12,5 %</b>
Priority	III.2. Growth conditions and quality of life in the countryside	
Aim	Create conditions for growth in rural areas. Improve the equipment and appearance of villages and public spaces and enhance the belonging of the population to the local environment and the rural heritage. Ensure the development of rural infrastructure with the goal of developing small and medium-sized businesses and improve the environment of rural settlements.	48 %
Action	III.2.1 Village renewal and development, civic amenities and services	39 %
	III.2.2 Protection and development of cultural rural heritage	9 %
Priority	III.3. Education	
Aim	Contribute to a higher level of education and employment in the rural population's labour market by developing guidance and education and increasing the use of information and communication technologies.	2 %
Action	III.3.1. Education and information	2 %

Source: Rural Development Program of the Czech Republic 2007-2013

## 2. Results of the analysis of approved projects under the Rural Development Program 2007 - 2013, measure III. 1.3 (a) - Promotion of tourism

Under the Rural Development Program 2007-2013, action III. 1.3 Support of Tourism - it was carried out project analysis on the basis of a number of successfully approved projects and in terms of volume of drawn funds. Overall, in the 2007-13 programming period Tourism Promotion has made 6 rounds of applications. Within these rounds, 116 projects were approved, 91% of which involved the construction of footpaths, 6% of bridle paths and 3% of wine routes. In the 10th round, the highest number of applications was approved (40), at least in the 4th call (8).

The second highest result in the number of approved applications was recorded in the 17th round (32). A distinctive feature of the submitted applications was the unevenness of their submission within individual rounds. The exception was the South Moravian Region, which was the only one to receive funds during each call. There followed Jihočeský and Olomoucký regions, which drew the lowest number of drawings (2) out of the total number of calls (6) from Karlovarský, Pardubický, Ústecký, Moravskoslezský and Vysočina.

The exact number of approved applications by individual rounds and regions is given in Table 3 below:

**Table 3: Number of approved projects per round: by region**

Region	2. round	4. round	7. round	10. round	13. round	17. round	Total
Jihomoravský	3	3	2	3	5	4	20
Středočeský	0	1	0	9	0	10	20
Ústecký	0	0	0	10	0	5	15
Olomoucký	0	1	3	5	1	2	12
Královéhradecký	2	0	0	7	1	1	12
Liberecký	0	0	0	7	1	1	9
Jihočeský	2	0	1	3	1	1	8
Plzeňský	1	0	1	0	1	2	5
Zlínský	0	1	0	2	1	0	4
Vysočina	0	1	0	0	0	3	4
Karlovarský	0	1	0	0	2	0	3
Pardubický	0	0	0	0	1	1	2
Moravskoslezský	1	0	0	0	0	1	2
Total	9	8	10	40	17	32	116

Source: Own processing based on reports of SZIF and EAGRI (2007 – 2013)

In terms of regional evaluation of the number of approved projects, the South Moravian Region has the highest number of 20 projects. 75% of these projects concerned the construction of hiking trails and rest areas, 10% building of bridle paths and 15% setting up of wine routes. The Central Bohemian Region also had 20 approved projects that focused on the construction of tourist routes, but the financial amounts were drawn only in later rounds. It was followed by the Ústí Region, where 15 projects were approved. The vast majority of proposals (14) of the Ústí Region were directed towards the construction of hiking trails, only one focusing on bridle paths. The Olomoucký and Královéhradecký Regions had 12 approved applications exclusively for hiking. In the area of the Liberec region, 9 projects were approved, with an overwhelming majority focusing on hiking, only 1 project aimed at supporting the construction of a wine-growing trail. In the South Bohemian region, 8 projects were approved, focusing by 25% on bridle paths and by 75% on hiking trails. Plzeňský region recorded 5 projects, Zlínský and Vysočina 4 approved plans, Karlovy Vary 3 and Pardubice Region and Moravskoslezský for the whole program period recorded the lowest number of approved projects (2).

In terms of funds, the total amount of the projects was CZK 101,802,073. Central Bohemia dominated the number of approved money for financial support of projects, followed by the Ústí nad Labem region. The projects that were most approved for the South Moravian Region were located in the region of Central Bohemia and Olomouc from the financial point of view. The lowest amount of funds was approved for projects from the Moravian-Silesian Region. Karlovy Vary Region and Vysočina Region. Within this region, less than CZK 2 million was earmarked for

more funding. The overall overview of the funds obtained in the individual regions is shown in Table 4.

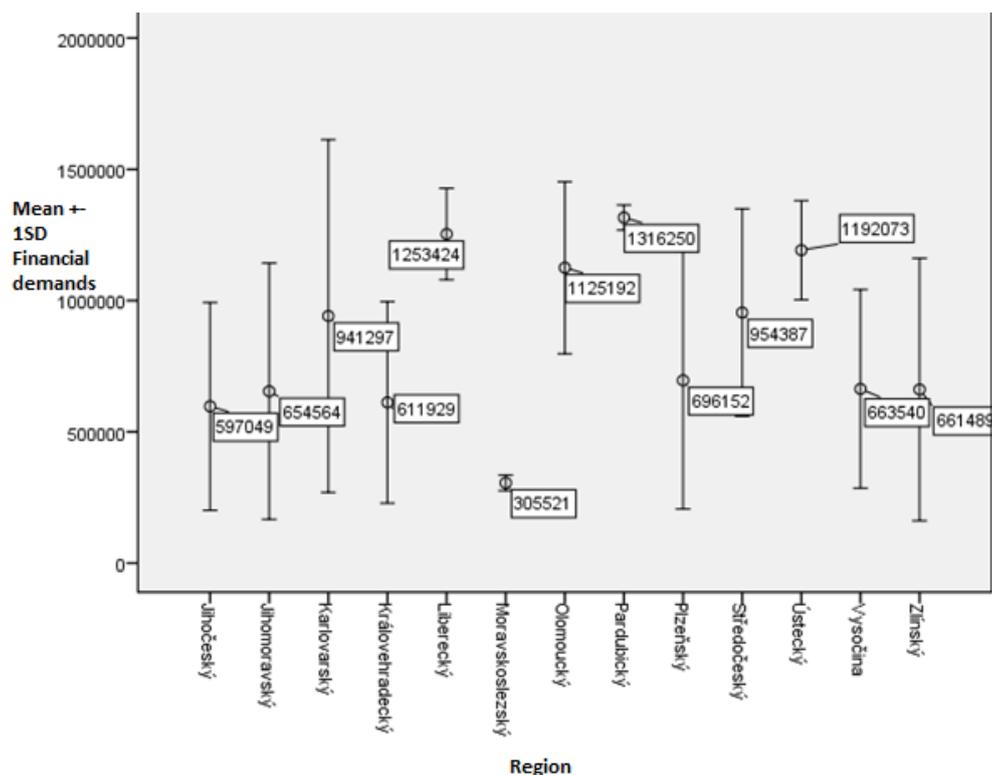
**Table 4:** Allocated funds by region (in CZK)

Region	Allocated funds (CZK)
Středočeský	19 087 735
Ústecký	17 872 092
Olomoucký	13 502 300
Jihomoravský	13 091 280
Liberecký	11 280 815
Královéhradecký	7 343 152
Jihočeský	4 776 392
Plzeňský	3 480 759
Karlovarský	2 823 891
Vysočina	2 654 160
Zlínský	2 645 955
Pardubický	2 632 500
Moravskoslezský	611 042
<b>Total</b>	<b>101 802 073</b>

Source: Own processing based on reports of SZIF a EAGRI (2007 – 2013)

61% of the support was drawn from four regions (Ústecký, Středočeský, Jihomoravský and Olomoucký), projects from the other 9 regions received support only in the amount of 39% of the total financial allocation. Plzeňský, Pardubický, Zlínský, Kraj Vysočina and the Karlovy Vary Region benefited from 3% of the total amount, and the Moravskoslezský Region benefited only from one percentage point. It is clear from the above-mentioned figure that the support provided was unevenly distributed to individual regions.

**Graph 1: Average amounts drawn in regions of the Czech Republic**

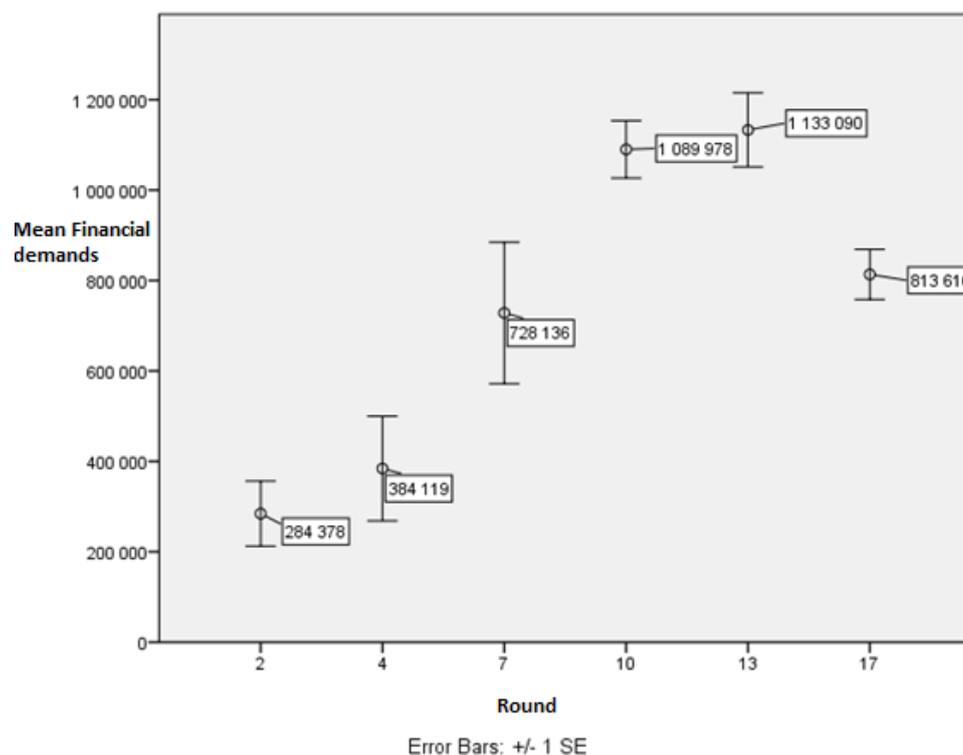


Source: Own processing based on data SZIF and EAGRI (2007 – 2013)

Graph1 shows the average amounts that were drawn to the project in each region. The highest project amount of CZK 1,350,000 was approved for projects from the Central Bohemia, Jihomoravský, Pardubický, Královéhradecký, Liberecký, Plzeňský and Ústecký regions. On the contrary, the lowest amount for a project of CZK 101,880 went to the Vysočina Region. The average amounts in each region fluctuated.

Generally speaking, applicants from the Pardubice, Liberec and Ústí regions have requested the highest amounts for the project. The lowest amounts were approved for those from the Moravian-Silesian Region, and the Karlovy Vary and Plzensky Regions recorded the largest range of approved financial amounts for the project.

**Graph 2: Average amounts of subsidies drawn in individual rounds**



Source: Own processing based on data SZIF and EAGRI (2007 – 2013)

Graph 2 shows the average sums of subsidies drawn within each round. On average, the lowest amounts were drawn in the first two rounds with a growing tendency. The highest average amounts were required under the 10th and 13th rounds of calls, but in the last round there was again a decrease in the average of drawn amounts.

**Graph 3: The focus of projects – areas**

	Frequency	Percent	Valid Percent	Cumulative Percent
Bridle paths	7	6,0	6,0	6
Hiking routes	104	89,7	89,7	95,7
Winery	5	4,3	4,3	100
Total	116	100,0	100	

Source: Own processing based on data SZIF and EAGRI (2007 – 2013)

Graph 3 represents the percentage of targeting of projects by individual support areas. As mentioned in the introduction to this paper, most of the nearly 90% projects were focused on hiking, followed by bridle paths (6 %) and the winemaking (4 %). From the overall point of view, these last two areas were only minor in the project focus.

## Conclusion

Based on the carried out analysis of the drawing support from the Rural Development Program 2007 - 2013 axis III. 1. 3. Support of tourism a) hiking trails, wine trails, bridle paths, it became clear that the largest number of projects was approved for the South Moravian, Central Bohemian and Ústí regions. According to the thematic focus of the projects, projects focusing on the construction of pedestrian routes were the most supported. The highest amounts were drawn by the Ústecký, Středočeský and Olomoucký Regions. For the individual rounds of application process, it was characteristic that the funds were not drawn evenly within them.

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# SOCIAL SECURITY OF EUROPEAN UNION OFFICIALS

IVA CHVÁTALOVÁ

## **Abstract**

*The paper discusses the legal aspects of social security rules applicable to European Union officials, namely pension, invalidity and survivors benefits, social entitlements in case of labor accidents and occupational diseases, as well as other social benefits and other selected issues as well. The account of legal regulations has been complemented by relevant case law of the Court of Justice of the European Union.*

## **Keywords**

*social security, European Union officials, European Union law, European Union Staff Regulations*

**JEL classification: H11, R50**

## **Introduction**

The legal status of officials of the European Union is governed by Regulation No 259/68 on the Staff Regulations of Officials of the European Union and the Conditions of Employment of Other Servants of the European Union, as amended (hereinafter referred to as the “Staff Regulations”). An official shall be appointed by an official of the European Union body on the basis of an official instrument (Syllová, 2010, Tichý, 2014). The cited Regulation sets out three categories of officials, namely administrators, assistants and administrative staff (Grmelová, N. Chvátalová, I, 2016). In addition to officials, temporary agents and contract staff also work in the EU institutions. This contribution is focused on officials and their social security coverage.

The social security coverage of EU officials is mainly governed by the Staff Regulations. But to a necessary extent, national law and other sources of EU law are also taken into account. Such a conclusion can be based not only on the provisions of the Staff Regulations but also on the case-law of the Court of Justice of the EU.

As far as social security in the Member States of the European Union is concerned, states are shaping their own social security systems or branches, both insurance and non-insurance schemes. The current state of national social security schemes has been influenced by many historical, economic, and demographic factors (Čajka, 2011), by international sources (Horváthová, Abrhám, Chvátalová, 2015) as

well as sources of European Union law. In Europe, therefore, no identical legal regulation can be found, but on the other hand we can identify many similar features and with a certain degree of inaccuracy we can assign states to a particular social model (Andersen, 1990, Horváthová, 2016, Horváthová, Jankurová, 2016).

In view of the above, we note that Member States provide their citizens and other persons with all major social events, which are listed in particular in the Convention on Minimum Standards of Social Security (ILO document) or the European Social Security Code (Council of Europe document). Citizens of the EU or other persons are entitled to cash benefits and other types of benefits in case of sickness, pregnancy, maternity or paternity, nursing of a child or of other family members, child support and care, old age, disability, death of the breadwinner, unemployment, accidents at work and occupational diseases, reliance on other people’s help, poverty and social exclusion. The previous list is merely indicative (Tröster, 2014).

Looking at the social security legislation for civil servants in the individual EU Member States, we find that it is either completely identical to that of other employees or, there are only partial distinctions. However, special arrangements may be made for selected categories of civil servants, possibly linked to a separate law. The existence of distinctions or separate adjustments is usually focused on more favorable social entitlements due to increased duties and responsibilities of officials and other civil servants. The above mentioned can be to a certain extent also affected by whether the status of officials in the respective state is based predominantly on a merit system or a career system. (Novotný, V. 2015)

In the Czech Republic, the status of employees in the service relationship with the state is regulated by Act no. 234/2014 Coll., on the Civil Service, as amended, Act no. 361/2003 Coll., on the employment relationship of members of the security forces, as amended, Act no. 221/1999 Coll., on professional soldiers, as amended, and the related laws. (Čebišová, 2014) These laws contain derogations from the general legislation only to a limited extent. In particular, the provisions of Section 126 of the Civil Service Act do not contain specific provisions for sickness, pension and health insurance and refer to other relevant laws. (Pichrt, 2015, Kottbauer 2014) For example, according to Act no. 48/1997 Coll., on Public Health Insurance, as amended, the spouses and registered partners of a civil servant are also included among the persons for whom the state pays insurance, as long as the spouse or the registered partner follow the civil servant to the place of his/her posting to perform the foreign services (§ 7 (1) of the Act); according to Act no. 155/1995 Coll., on Pension Insurance, as amended, the scope of voluntarily insured persons was extended to the above mentioned persons (§ 6 (1) of the Act) and so on. Social assistance and state social support is not mentioned by the Civil Service Act at all.

The social security legislation at EU level places a major emphasis on the maintenance of social entitlements and on the granting of equal rights and the fulfillment of the same obligations as nationals of the respective state with regard to persons enjoying the freedoms of movement (Chváralová, 2016). If we focus on secondary sources of EU Law, personal scope and other aspects are defined by Regulation (EC) No 883/2004 on the coordination of social security systems and Regulation (EC) No 987/2009 laying down detailed rules for the implementation of Regulation 883/2004 on the coordination of social security systems (Koldinská, 2012). Other social security aspects include directives.

Social security for officials is governed, to a limited extent, by EU law, namely the Staff Regulations. Relevant provisions are contained, in particular, in Title V entitled Revenue and Social Security of Officials, Articles 72 to 84 of the Staff Regulations and in some annexes, particularly in Annexes VII, VIII and XII. Regulations on the coordination of social security schemes apply only to so-called “contract staff” of the European Union (see Article 15 of Regulation 883/2004), not to officials. This is because the cited regulations coordinate national social security provisions, not national and EU sources.

As can be inferred from the case-law of the Court of

Justice of the European Union (formerly the Court of Justice, hereinafter referred to as the Court of Justice), certain principles contained in the Regulation on the coordination of social security systems apply to officials as much as necessary. This can be demonstrated, for example, in the judgment of 16 December 2004 in case C-293/03 *Georgio My v. ONP*. The case concerned the dispute between Mr Georgi My and the “Office national des pensions”. Mr. My worked first for Belgian companies and then for many years as an official in the General Secretariat of the Council. Under Belgian law, for the purposes of entitlement to early retirement, it is not possible to take into account the length of a career in an EC/EU body. As a result of not counting these times, Mr. My was not entitled to the pension. In the context of the preliminary ruling procedure, the Court dealt with the question whether such an adjustment is compatible with EC law. The Court said that the Regulation on coordination of social security systems does not apply to the case, but the length of the professional career in an EC/EU body has to be counted. National rules that do not allow it are incompatible with European law as the principle of aggregation of periods is one of the key principles of social security coordination.

The Staff Regulations regulate the European health, accident and retirement system, enshrine selected benefits related to the birth and care of a child, including in the related provisions, which are contained in the third or fourth chapter. Also, the Staff Regulations provide for benefits in case of the death of an official or that of specified family members.

Article 72 of the Staff Regulations relates to sickness insurance and states that an official, his spouse and, subject to the conditions laid down, an official’s partner, dependent children and other dependents are insured against illness up to 80% of the costs. As a result of this insurance called the Joint Sickness Insurance Scheme, health care costs are covered. These costs first apply, except for exceptions, directly to the official. Only then will they be reimbursed within the set limit. Full reimbursement is only relevant for the treatment of serious illnesses such as cancer or diabetes.

Article 73 of the Staff Regulations establishes benefits to which an official and other persons are entitled in the event an occupational disease or injury occur. Accident insurance includes payments differentiated by the consequences of the aforementioned social event. Expenditure on medical treatment, medication, hospital stays, etc. is also covered if the financial amount does not fully cover the expenses incurred.

Article 74 of the Staff Regulations provides for a cash grant at the time of the birth of a child and, similarly, for the adoption of a child under five years of age. Benefits for child care are also regulated, for example, by Article 67 of the Staff Regulations. This concerns family allowances, including a child-care allowance (see Appendix VII, entitled Remuneration and Reimbursement of Expenses). In this context, it is appropriate to mention the judgment of the Civil Service Tribunal of 19 November 2014 in Case F-422/14 EH v. European Commission, which concerned the review of disciplinary measures, nevertheless had a significant link both to the social provisions of the Staff Regulations and to National regulations. An official was granted a family allowance from the competent EU institution, however that official did not comply with the obligation laid down in Article 67 (2) of the Staff Regulations and did not report that his wife received a similar benefit from other sources. In the present case, this was a child benefit under national law.

The safeguarding of women on maternity and parental leave is governed by Title Three, Chapters Two and Four, which concern the service of officials and their working conditions. An official may apply for paid leave on grounds of pregnancy and maternity of a basic duration of 20 weeks and paid parental leave of a basic length of six months. Pregnancy and maternity leave begins at least six weeks before delivery and ends no earlier than 14 weeks after the birth date. In case of multiple or premature birth, the birth of a seriously ill child or a disabled child, the period of leave is 24 weeks (Article 58 of the Staff Regulations). Fathers are entitled to extraordinary leave of 10 days and receive it within 14 weeks of delivery. If a child with a disability is born, this leave is 20 days (see Appendix no. V of the Staff Regulations). During maternity leave and paternity leave, salary is retained. During the period of parental leave there is no salary, but a fixed monthly allowance. Where parental leave is taken in the form of half-time leave, the maximum period shall be doubled (Article 42a of the Staff Regulations). The Staff Regulations also provide for the taking of parental leave by the father and provides for preferential treatment of single parents and parents of a dependent child who is disabled.

The following two articles concern claims for the death of an official or specified members of his/her family, such as the possibility to provide support to a surviving spouse suffering from a serious or protracted illness or is disabled.

Chapter three and the subsequent Annex VIII entitled

“Pension System” and No. XII entitled “Implementing Rules for Article 83a of the Staff Regulations” set out the details of this issue. An official is entitled, in accordance with the Staff Regulations, to a retirement pension and an invalidity allowance. His/her family members will receive widow’s or widower’s and orphan’s pension. Entitlement to a retirement pension arises after retirement age and at least ten years of service unless the Staff Regulations provide otherwise (see e.g. article 52 of the Staff Regulations). The retirement age is now 66 years, it is reviewed every five years (since 2014) and, if necessary, the European Commission is entitled to make a proposal to change it. Before 1 January 2014, the retirement age was lower and the table contained in the Annex VIII indicates its gradual increase. The annex also foresees the possibility of transferring the acquired pension rights.

This area is very sensitive and has been the subject of a Czech Court’s decision. Let us state the judgment of 4 July 2013 in Case C-233/12 in Gardella, judgment C-293/03 and judgment of 5 December 2013 in Case C-166/12 Radek Časta v. ČSSZ. In the Czech Republic, the Supreme Administrative Court also dealt with this issue in case of R. Časta, based on a cassation complaint (see the judgment of 30 August 2016, file no. 5 Ads 181/2015). The above judgments mainly lead to the following conclusions. The Staff Regulations allow an official to transfer the pension rights acquired in the EU scheme to Member States’ pension schemes and vice versa. An insurance-mathematical model is employed in order to quantify the transfer of the pension rights. It is to be expected that 100% of the funds will not be transferred. If the official does not transfer his/her pension rights, the so-called division of pensions within the meaning of the Regulation on the coordination of social security systems also applies, even on the basis of analogy. The application of the fundamental rules of social security coordination regulations is based on an interpretation compliant with EU Law. This is necessary if neither EU nor national law regulates the matter.

## Conclusions

Social security is governed by national law, international public law, and its selected aspects by the sources of European Union law. The social claims of EU officials are enshrined in Regulation no. 259/68 on the Staff Regulations of Officials of the European Union and the Conditions of Employment of Other Servants of the European Union, as amended. To the

necessary extent, however, national legislation and other sources of EU law, in particular Regulations no. 883/2004 (EC) on the coordination of social security systems and Regulation (EC) no. 987/2009 laying down the procedure for implementing Regulation No 883/2004 on the coordination of social security systems apply as well. Such a conclusion can be based not only on the provisions of the Staff Regulations but also on the case-law of the Court of Justice of the EU.

The provisions of the Regulation on the coordination of social security systems are used on the basis of an interpretation compliant with EU law, especially in situations where the directly applicable European Union law, in our case, the Staff Regulations or national law, does not allow aggregate years of work within the EU institutions to qualify for a pension under national law.

The Staff Regulations stipulate the European system of health, accidents and pensions, provide for benefits in the case of the death of an official or members of the family and provide for other selected social benefits and, where appropriate, salaries and similar benefits related to the birth and care of the child, including the related provisions. In particular, in title three and four of the Staff Regulations.

It can be said, therefore, that officials carrying out their work in the institutions of the European Union enjoy a sufficient coverage in the area of social security. In addition, their pension rights acquired under EU law can be transferred into national law, and vice versa. This competitive package of social security benefits is one of the factors which motivates candidates to take part in open competitions in view of becoming European Union civil servants.

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# CURRENT SECURITY ASPECTS OF PIRACY AND ITS IMPACT ON THE DEVELOPMENT OF THE SECURITY ENVIRONMENT

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## **Abstract**

*The contribution deals with the problem of piracy as an issue relatively well-known, not only with reference to the conceptual definition and sources of refuge, as well as the causes and consequences of this international, can be said today in an ancient and unresolved problem. Underconsistent dismantling of the problem it shows that the causes are, despite the passage of time and maturation of human consciousness identical. These are the reasons that are part of the population and are an enormous threat to international security. Social, political, economic or religious differences in the country are caused in ideal area for conflict in the international arena.*

## **Keywords**

*piracy, refuge, ancient, threat, international security, conflict*

**JEL classification: K32, K33, L91, R41**

## **Introduction**

The theme of piracy is not a new topic, on the contrary, this topic and its problems are bothering mankind from a long time. This concept has come through many development stages. Its definition has been formed by many different factors such as humanity development, the creation of national territories and the sovereignty and strength of individual stages as well as their citizens. Its meaning has been adapted to the need of the threat that existed in that period of time and that was necessary to include under this topic. The word "pirate" comes from the Greek word "peiratés," which means to try / achieve, and in the past, the meaning of "robber" has also been impressed. This term was used to refer to the robbers who fought by overtaking sea ships and seizing assets on board. It is precisely this kind of "livelihood" that is being considered of a form of criminal offense according to the law.

There is no unified opinion of different authors, experts of international law, or specialized departments on this issue. Until now, the only source where this term is classified for international law purposes is the United Nations Convention on the Law of the Sea, UNCLOS III, signed 10.12.1982 in Montego Bay, Jamaica, valid from 16.11.1994 (binding on the Slovak Republic as of 7.6.1996).

Piracy is a fact that, unfortunately, the individual

countries have learned to live with. In the field of international security, it is not a new concept, but despite the effort, it is still unfinished. By exposing the world's history, it is not perceptible in the conditions of the Slovak Republic, and thus cannot be said or examined sufficiently. The issue of piracy from the point of view on the impact on the Slovak Republic as a Member State of the European Union and its citizens is necessary to refer from a legal point of view. The object of the attack by the pirates can be citizens of the Slovak Republic, ships under the flag of the Slovak Republic or other belongings of the Slovak citizens. The Slovak Republic is part of the European Union, the Euro-Atlantic structures and is a member of the United Nations, which implies certain commitments with an impact on its foreign policy. Account must also be taken of the economic dimension of this problem, which also has a major impact on world markets, which again comes to the fact that it also affects the Slovak Republic.

Piracy can also be understood as a procedure, whereby a person or several persons commit a violent offense on seagoing ships or aircraft, which means that the act can be considered a criminal offense. The concept of piracy has always been linked to different opinions that have continually shifted its meaning. Most commonly, in the available literature, we can read the definition of piracy by Cicero de Officiis, a well-known Roman philosopher and spokesman, who in his writings linked the concept of pirate with the significance of the hostility of mankind. The definition of the concept at the international level first appeared only in 1958, in the adopted UN Conven-

tion on the High Seas, in article 15. In the wake of the 1958 Convention, the term 'piracy' came into international consciousness and it was also reflected in the 1982 Convention on the Law of Sea, UNCLOS III, often also called the Montego Bay Convention (the "Montego Bay Convention"), in article 101, where it defines piracy as:

- „a) any illegal acts of violence or detention, or any act of depredation, committed for private ends by the crew or the passengers of a private ship or a private aircraft, and directed*
  - aa) on the high seas, against another ship or aircraft, or against persons or property on board such ship or aircraft;*
  - ab) against a ship, aircraft, persons or property in a place outside the jurisdiction of any State;*
- b) any act of voluntary participation in the operation of a ship or of an aircraft with knowledge of facts making it a pirate ship or aircraft;*
- c) any act of inciting or of intentionally facilitating an act described in subparagraph (a) or (b)."*

However, it is possible to mark a pirated act only after the cumulative fulfillment of the elements of piracy, which is the illegality of the act / deed, that act was carried out using force, from one vessel or aircraft to the other.

In view of the implementation of these unlawful acts that are threatening and violating security, both domestic and international, it is necessary to draw attention to the space of the sea, or to an area which is not under the jurisdiction of any state. The breadth sea is in the context of Art. 83 of the Montego Bay Convention defined as "all parts of the sea which do not constitute the exclusive economic zone, the coastal sea, the internal waters or the archipelagic waters of the State". Although this definition is defined in a negative way, it is clear from it that what kind of territory the breadth sea is covering. Significant signs of the breadth seas are, in general, the freedoms, the demonstration of which, according to Art. 87 of the Montego Bay Convention is freedom of navigation, over flight, laying of submarine cables and long-distance pipelines, construction of artificial islands and other facilities, fishing and scientific research. It is these freedoms whose idea of embedding in a binding act has been brought in bona fide has had a negative impact on strengthening the courage of adherents of pirated groups. Although the Montego Bay Convention clearly empha-

sizes that space for the enlarged sea is reserved for peaceful purposes, the problem of piracy is growing from year to year<sup>1</sup>.

In the question of jurisdiction in relation to maritime piracy, it is necessary to note that these crimes apply universal jurisdiction through which each State of the international community has jurisdiction over the most serious crimes under international law, no matter where and by whom it was committed, if there is no connection with the territorial or personnel nature of the application. Such rules can only be affected if shipments or aircraft are moved to shore-based waters already under the jurisdiction of the coastal State concerned during the attack. The application of the jurisdiction of a particular State is a question which can be answered in a particular case as a result of the place of attack and the completion of the commission of the offense, with regard to its consequences.

Despite the fact that piracy is a socio-economic problem, the Somali basin, the Gulf of Aden, the Arabian Sea, the Indian Ocean, West Africa, Indonesia, the Mela and Singapore Straits, the South Korean Sea and the South American region can be described as the largest sources of its spread. When these critical areas are projected into the geographical box, it is clear that there are important business routes or humanitarian aid routes. We are currently witnessing a myriad of pirate attacks and a day-to-day increase of their adherents from various parts of the world, but the most critical country of this issue remains Somalia and its citizens.

Somalia belongs among ethnically, linguistically and religiously most homogeneous African states. The population of Somalia is not uniform and is divided on the basis of belonging to individual clans. The 1960s were important for Somalia as the was unified (Somaliland and Somalia), which led to its unity and independence with the establishment of a democratic government. The change in the country occurred in 1969, when the democratic government was overthrown and replaced by the socialist regime. The country lived in the fear, pressure and disbelief of its inhabitants against the regime, which led to the strengthening of the individual clans, the

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<sup>1</sup> *Gulf - Category of inland waters whose input width does not exceed 24NM.*

*Coastal waters - each State has the right to determine the breadth of its coastal waters which will be under the jurisdiction of that State, subject to a maximum width condition that represents a distance of 12 NM from the baseline.*

*The baseline - the line of greatest tide along the coast, as depicted in large scale sea maps officially recognized by the coastal state.*

deterioration of the economic situation. In 1991 that happened to conclude into the overthrow of the established regime. During the history of Somalia, different clans were trying to gain the power over the country which has led into civil war and into division of Somalia into several territories. Ongoing conflicts have destroyed the country's economy, caused poverty, unemployment, hunger, and migration. The very consequences of a multi-year formation of Somalia with a negative outbreak have led its inhabitants to choose piracy and trade in weapons that target mainly Kenya, South Sudan, Ethiopia and the Democratic Republic of the Congo as an appropriate means of tackling significant shortcomings. Since the 1990s, the international community has repeatedly attempted to improve the situation in the country by providing humanitarian aid, which has also become target of the pirate attacks.

The states concluded conventions upon the threat posed by piracy where they committed themselves to providing mutual assistance. International projects such as EU NAVFOR SOMALIA (ATALANTA), which began in 2008 and was extended for the end of 2016, were trying to eliminate security threat. The aim of this operation is to protect merchant ships (WFP, AMISOM), to reflect and disrupt pirate attacks, to monitor fishing activities along the Somali coast as well as to support other European Union missions and international organizations working on maritime safety. EU operation NAVFOR SOMALIA is of great importance for the countries of Europe and hence the Slovak Republic in terms of providing protection, as such a security breach has an impact on transport in the main European-Asian corridor and disrupts security on the main trade routes in the area. Businesses that have been shipping along the routes mentioned above for fear of pirate attacks are increasingly using the sea route around the Cape of Good Hope to avoid the Suez Canal. Piracy has become a very lucrative criminal business, and the losses that are the result of it are disproportionate to the number of pirates involved. The consequences, for example, are that it complicates the supply of food aid from the European Union to drought victims in Africa where they need it most.

The problem of piracy is not a question that will be solved by one meeting at the global international level. It has also been a long-standing issue, which will require a huge international effort at the international level, particularly with a view to preserving the security that ultimately reflects on the security of the national sphere. The process of effectiveness of the measures taken is necessary to be followed

in order to develop the future of the most effective form of protection built on solid pillars.

In conclusion, conflicts that arise and continue on the international scene are increasingly perceived as a security issue. It is necessary to draw attention to their violent character, usually accompanied by the victims. It is essential that the security system set up so far in the coming years has made some progress and not stagnating in one place. That is why we need a comprehensive global strategy, including preventive and dissuasive measures, operational guidelines for better co-operation of naval forces, prosecution of pirates and tracing of their financial resources. Security experts and their builders may, in their reflection on the elimination of the problem of piracy or other unresolved problem, be able to show distrust of future unified interference in the fight against international conflicts, as its theoretical name is also a problem. For example, the notion of conflict, or conflict prevention, is not uniformly stated, and their theoretical definition offers only explicit expressions of ideas and opinions of personalities at the international level, but this is not binding on the countries of the world. Solving the practical side of that conflict, it is also necessary to rely on the binding definition of the facts and the factors connected with it and their subsequent arrangement and unification into the legal order which will be an adequate basis for the decision.

It would be worth considering whether, in this case, it is more efficient to build international cooperation to address international conflicts threatening and weakening security on the basis of short-term projects, while engaging them on a voluntary basis, whether financially or physically. Or there will be a will to remove any other international problem based on unity, by bringing countries together at international level and by creating a unified judicial system that will judge and then punish such international offenses.

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