



**Masters International
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MIRDEC 2018

MIRDEC-8th
International Academic Conference
Social Sciences, Multidisciplinary, Economics,
Business and Finance Studies
(Global Meeting of Social Science Community)

CONFERENCE PROCEEDINGS LISBON, PORTUGAL

Full Paper Series

Editors
Antonio Focacci
Adam Pawlicz
Kemal Cebeci
Tanu M. Goyal

RadissonBlu, Lisbon, Portugal
29-31 May 2018

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Editors

Antonio Focacci

Bologna University, Italy

Dr. Antonio Focacci is a senior lecturer at Bologna University in Italy. He has publications and presentations in various international journals and conferences. He is invited member of two international Journals Editorial Bords and served as a referee for many others. His research interest have covered different fields in economics and in management with specific reference on: sustainable economics, economics of commodities, economic cycles, investment assessment, energy and renewables, models for evaluating CSR and strategic positioning of business, etc.

Adam Pawlicz

University of Szczecin, Poland

Dr. Adam Pawlicz is a research scientist with 11 years of research experience in the hospitality and e-tourism area. Adam Pawlicz is associate professor at Szczecin University, Poland and a visiting professor at Klaipeda University, Lithuania. He has coauthored over 100 publications and is a member of scientific committee of various international journals such as *Academica Science Journal*, University of Tîrgu Mureş, Romania and “Entrepreneurship” issued by SWU “Neofit Rilski”, Bulgaria. His current research focuses on the impact of sharing economy and online travel agencies on hospitality market.

Kemal Cebeci

Marmara University, Turkey

Dr. Kemal Cebeci is a senior lecturer at Marmara University in Turkey and at the same time the director of Masters International Research & Development Center. He obtained his PhD degree with his thesis on the topic of corporate income tax and tax competition. Ha had publications and presentations in various journals and international conferences with his researches on; tax policy, tourism, corruption, debt crisis, corporate income tax, etc.

Tanu M. Goyal

Indian Council for Research on International Economic Relations (ICRIER), New Delhi, India

Tanu M. Goyal is a Consultant at a New Delhi (India)-based policy think tank, ICRIER. She has several years of experience in policy oriented research, focusing primarily on India's international economic relations. She has worked on survey-based studies for the Indian government and international agencies including the Delegation of the European Commission to India, Department for International Development (DFID), Department of Commerce, Ministry of Food Processing Industries, Oxfam and the Asian Development Bank, among others. She has published two books, several articles in international and national journals and popular media articles. She has a Masters degree in Economics from Centre of Trade and Development, Jawaharlal Nehru University (JNU), New Delhi and is currently pursuing her PhD from the Centre for Study of Law and Governance, JNU.

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Tourism: Developing sustainable tourism destinations, tourism and heritage preservation, tourism economics, tourism policies, hospitality, tourism management and marketing, tourism planning and regional development, protected areas and tourism.

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KEYNOTE SPEAKERS

Fernanda Neutel

The European Union challenges for the future: making concessions or moving forward
University Lusófona, Lisbon

Ana Catarina Pagarim Ribeiro Kaizeler

Globalization and Development Challenges
Socius - Research Centre in Economic Sociology and the Sociology of Organizations,
University of Lisbon, Portugal

Luisa Margarida Cagica Carvalho

Business Incubation and Start-ups: A perfect couple?
University of Aberta, Lisbon, Portugal

Aline Gallasch-Hall De Beuvink

The Importance of the Cobblestone in the Touristic Life of the City of Lisbon
Universidade Autónoma de Lisboa, Portugal

Sandra Maria Calvino Ataíde Lobo

Thinking Transnational Archives and Conflictual Memories: The International Group of Studies of Colonial Periodical Press of the Portuguese Empire (Igscp-Pe) as a Democratic Project
Universidade Nova de Lisboa, Portugal

Joaquim Ramos Silva

The Present State of International Economics: Theoretical and Policy Implications
University of Lisbon, Portugal

Special thanks to Keynote Speakers:

Fernanda Neutel

University Lusófona, Lisbon

Ana Catarina Pagarim Ribeiro Kaizeler

Socius - Research Centre in Economic Sociology and the Sociology of Organizations,
University of Lisbon, Portugal

Luisa Margarida Cagica Carvalho

University of Aberta, Lisbon, Portugal

Aline Gallasch-Hall De Beuvink

Universidade Autónoma de Lisboa, Portugal

Sandra Maria Calvinho Ataíde Lobo

Universidade Nova de Lisboa, Portugal

Joaquim Ramos Silva

University of Lisbon, Portugal

Special thanks to Masters International Research & Development Center
conference team:

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IBF, Macedonia

Kemal Cebeci

Marmara University, Turkey

Beatriz Loureiro

Universidade Lusófona, Portugal

Ana Pardal

Instituto Superior Tecnico, Universidade de Lisboa

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FERNANDA NEUTEL¹

THE EUROPEAN UNION CHALLENGES FOR THE FUTURE: MAKING CONCESSIONS OR MOVING FORWARD

Abstract

The European Union is a unique experience, a hybrid political system, with a post national character, which is reinventing democracy. It is a multilevel system of governance, holding structures of a federation. Throughout times, the impetus for change has always structured it. Notwithstanding, since the 2008 crisis, the citizens of the Union have been struggling with disappointment and anger. However, the Union is one of the most important commercial and economic blocs in the world. It is the most important donor for cooperation and developing policies. It is an important international political actor and it has achieved peace, after two comprehensive, disruptive and destructive wars. Indicators for their disappointment can be summarized as follows: unemployment, the falling share of the population, immigration, terrorism, the rise of the extreme right, the citizenship deficit and the communication deficit. In order to regain people's trust, the EU should reinforce the creation of a single market & trade, deepen the economic and monetary union, create a stronger security and defence foreign policy, reinforce a foreign policy and a joint approach on migration, enlarge the neighbourhood policy and other external relations creating new economic opportunities. The grass root dimension should also be taken into consideration. The world is entering a new phase: a post party system, where citizens are embracing a new political modus operandi. The traditional communication system used by Brussels should also be redesigned. The educational system should be reshaped. Many argue that the Union's dilemmas will only meet answers at European institutional level, calling for an overwhelming deep reconfiguration of its main politics and policies and adopting a Constitution. The evolvement of the European Union is an incognito, but the Union has always surpassed crises and dilemmas. Consequently, it can only move forward.

Keywords: European Union, political system, crisis, development, post-party system, grass root dimension, communication, educational system, evolvement

JEL Codes: N00, N44

1. Accounts for the complexity of the system

The European Union is a unique experience and one of the most complex political systems in the world. It is a hybrid structure with no similarities, with a post- national character which is readdressing democracy by adapting former institutional mechanisms and reinventing them. In fact, the new political system changed the structure, giving new instruments to democracy and new representation channels. For many, it is a multilevel system of governance, with several decentralized layers of representation, holding structures of a federation.

Through times, it has been a laboratory for unconventional procedures with a somewhat hybrid character, creating synergies to enhance its powers and becoming a co-legislator in most policy areas. Overall, two arguments remain relevant: the novelty of the process and its mutable character prone to constant reappraisal. In fact, the impetus for change has always structured the European project. It has changed according to needs and dynamics, enabling new political channels. It has been a laboratory for

¹ PhD in Political Science/ European Studies by the University of Leeds- United Kingdom, and director for the Bachelor Degree in European Studies and International Relations in the University Lusófona- Lisbon, fernanda.neutel@ulusofona.pt.

many regional adventures. The European Union's possibilities are outstanding. It has impetus to recreate itself².

Nonetheless, in the last few years, the citizens of the European Union have been struggling with disappointment and anger. The 2008 crisis has disenchanted peoples' expectancies, raising an immense debate. Many suggest that the Union has instruments to give a solid answer, but it has not been using them. For many, the Union is not democratic enough and the institutions are not adequate. For others, the project may implode.

But will the European Union be able to overcome the present state of inertia and confusion? I will answer this question by a) providing some indicators concerning the economic and commercial development of the European Union; b) putting forward an account of some of the most visible threats to the process; c) providing two opposite range of scenarios for the European Union's way forward and d) adding some new concepts to progress.

At the end, I shall argue that the European Union has possibilities to move forward, providing it takes the right measures. I shall assert that the European Union has always surpassed crises and dilemmas. Consequently, it can only move forward.

2. From economic euphoria to people's disenchantment

In Paris, 1951, some European countries began an improbable journey. In Lisbon (2007), 56 years on, the European Union project was almost a reality. For that, a single market with free movement of goods, capital, services and people has been developed, a single currency implemented and a governance structure put in place.³ But the project did not only deepen internally, the European Union became a most significant global political partner and a most significant economic player. It is a global actor.

In fact, the European Union is one of the most important commercial and economic blocs in the world. It is the most important donor for cooperation and developing policies. It is an important political actor with embassies throughout almost the whole world, and it has achieved peace, after two comprehensive, disruptive and destructive wars: the most violent period of the European history and the world.

The European Union holds a population of about 508 million citizens with an internal market bigger than the United States which has about 300 million people. It represents 25% of the world GDP, having the second most used coin. It exports and imports 1/5 of the world production (excluding the internal commercial exchanges) which is slightly more than the USA and Japan. For 2017, the European Union's GDP represented 22% of the global economy.

As a humanitarian donor, it contributes with 56% of the total amount (74 million USD). The United States of America donates 24% (32 million USD) whereas Japan contributes with 7%, Canada 3% and Norway 3%. As a donor, there are still a lot to say. The Union's programs are very comprehensive and important. It adopted the Millenium development criteria, the generalized system of preferences, all but guns program (by which all the 50 less developed countries in the world acceded to the European market), it has food help and emergency programs, the Cotonou agreement, by which it guarantees

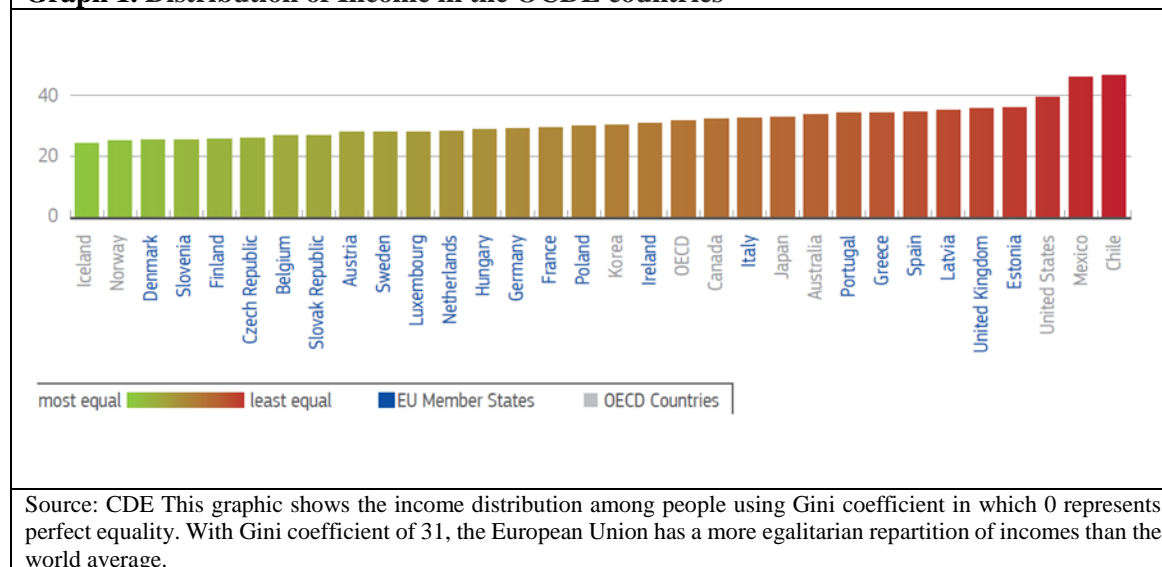
²Neutel, Fernanda- Pushing the Union forward? The role of the European Parliament in the European Union crisis (2015) in Demetriou, Kyriakos, (eds) *The European Union in Crisis: Explorations in Representation and Democratic Legitimacy*, Switzerland: Springer Verlag Academic Publishers.

³Neutel, Fernanda, "Is the European Union Falling Apart?", Katoikos.eu, February 17, 2017, <http://www.katoikos.eu/analysis/is-the-european-union-falling-apart.html>.

export free access products and a European development fund for financial help, is very relevant, it also has association agreements with many countries, and the neighbourhood partnership policy. For Syria, it has helped with 11 billion Euros in the last few years, and 560 million will be added this year. The European Diplomatic platform made up of negotiations in close relationship with the United Nations has meant a lot. It has been a source for peace, political/democracy evolvement and development

The European Union is also one of the most egalitarian societies. The graphic 1 below, shows the European Union as one of the most equal society as far as repartition of incomes are concerned, holding a total 31 Gini index⁴. These numbers are very important if we take into consideration that South-Africa holds an index of 62.5 and Finland 22. The Scandinavian countries show a 25 index, whereas the sub-Saharan countries a 50 index.

Graph 1. Distribution of Income in the OCDE countries⁵



Having the above variables into consideration, the hypotheses are that the European Union citizens should feel very attached to the European Union political project. However, looking at the 2017 Eurobarometer (table 1, below), we acknowledge that many citizens in the European Union feel disappointed. Although, 14.36% feel very attached and 41.39 % fairly attached (which makes a 55.75% overall), 30.42% people do not feel very attached and 11.71% not at all attached (42.13% overall). So, although results for those feeling attached to Europe surpass those who do not feel, the numbers are outstanding. They represent a significant group of people which have split away from the European Union venture, mirroring people's disappointment.

⁴ <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2172rank.html> (accessed June 16, 2018).

⁵ OECD=35member countries from North and South America to Europe and Asia-Pacific. The **Gini coefficient** is a measure of inequality of a distribution. It was developed by the Italian statistician Corrado **Gini** in 1912. To measure income, inequality 0 corresponds to perfect income equality (everyone has the same income) and 1 corresponds to perfect income inequality (one person has all the income, while everyone else has zero income). <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2172rank.html>; <http://hdr.undp.org/en/content/income-gini-coefficient> (accessed June, 16, 2018).

Table 1. Eurobarometer results – 2002-2017

<u>Date</u>	<u>Very attached</u>	<u>Fairly attached</u>	<u>Not very attached</u>	<u>Not at all attached</u>
10/2002	10.29 %	34.86 %	35.55 %	16.13 %
03/2006	12.49 %	38.30 %	32.59 %	13.57 %
04/2007	12.62 %	41.35 %	31.65 %	11.89 %
09/2007	11.67 %	38.46 %	33.35 %	13.85 %
05/2012	8.33 %	37.49 %	36.94 %	15.10 %
11/2013	9.02 %	36.59 %	35.63 %	16.27 %
11/2014	9.52 %	35.83 %	36.19 %	15.63 %
11/2015	10.96 %	38.25 %	33.45 %	14.91 %
11/2016	11.33 %	39.47 %	33.36 %	13.79 %
05/2017	13.80 %	39.73 %	30.71 %	13.50 %
11/2017	14.36 %	41.39 %	30.42 %	11.71 %

Source: <http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Chart/getChart/themeKy/26/groupKy/314>.

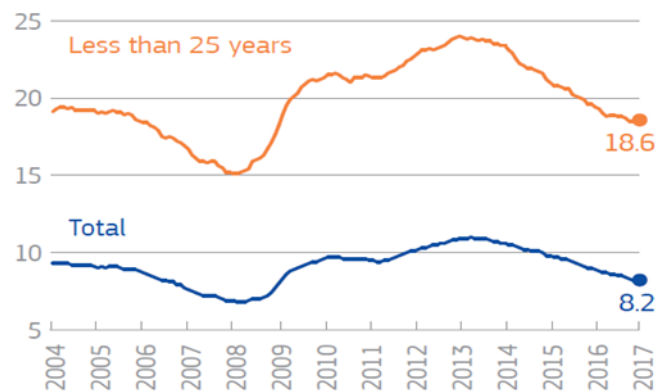
3. Threats, challenges and dilemmas

So, how can we explain this people's disenchantment towards the European Union? Shouldn't this venture means the wish to move forward? Why is it not happening? What are the threats the citizens of the European Union are facing today? Apparently, challenges come from everywhere. There are dilemmas that both neither the Union, nor the national governments have been able to solve so far.

Unemployment is one of them. In 2011, a major crisis occurred and since then a pronounced economic and financial crisis took the Union by storm. In 2013, for instance, youth unemployment reached 23.7% on average, with Greece and Spain reporting 58.3% and 55.5%, going hand in hand with an incipient negative economic growth of -0.4% and -0.1% in the EU. In 2015, unemployment reached 23.067 million people with the highest rates for Greece (25.7 %) and Spain (23.9 %). In 2017, according to the Eurostat, showed by the Graphic 2 below, unemployment, raised 18.6% for young people, going down to 8.2% when addressing total numbers. As for 2018, Greece gets 20.9% and Spain 16.3%. Even, if we consider that unemployment is decreasing in the European Union, these are outstanding numbers if we consider the low unemployment rates it used to have in the past. And unemployment strikes peoples' lives in most dramatic ways. The negative collateral effects take a long time to disappear. They haven't

yet vanished from the Union's society and they will possibly remain for times to come. In fact, they might even have devastated whole generations of young people forever.

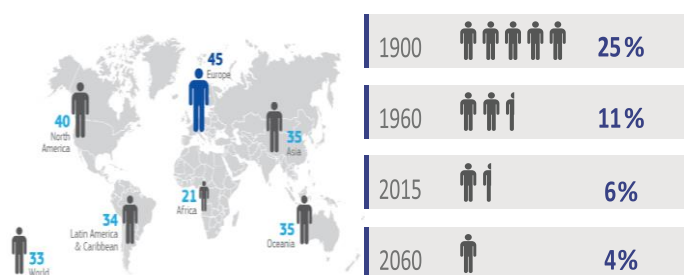
Graph 2. Unemployment



Source: European Commission.

Population is also a major problem. Although, statistics say that by 2080, the European population will increase by 2.0%, people are getting older. And Europe represents a significant falling share of the world's population. In 2030, the Europeans will be the oldest population in the whole world (Graphic 3). These will bring problems as far as financial resources are concerned. The paradigm is changing. Lots of questions need to be readdressed. What raises more speculation is how to get resources to respond to people's needs. This issue and many other can only be tackled at the European Union level. States, particularly the smallest and poorer, do not have possibilities to do so. But health care will become more and more important as time goes by. Many countries, particularly the poorer ones, show a deficit on this aspect. As time goes by, this discrepancy will increase.

Graph 3. People's average age in 2030 and the falling share of the European population



Source: Rand Europe

This figure shows a projection of the average age of people in each region of the world in 2030 and the falling share of the population.

Immigration is also a dilemma for the European Union. In 2011, almost 400.00 immigrants came to Europe, and in 2015, according to official numbers from the European Asylum Support Office (EASO), applicants for international protection amounted to 1 392 155, meaning 2676 asylum seekers per million of EU inhabitants. In March 2018, 49.957 asylum applications were lodged in the EU (a 4% increase

compared to February 2018), according to EASO. Most of these people come from Syria, Iraq, Afghanistan, Nigeria or Pakistan. This has created a humanitarian and political crisis. Some countries did not accept the Commission's proposals and acted individually out of fear. They have protected themselves against the problem by: raising border controls, closing borders, building fences, suspending ferry links and rail travel, introducing spot checks on cars, declaring the state of emergency with soldiers' deployment. But one of the problems is that some of the asylum seekers were those who committed attacks in Europe, providing grounds for this fear.

And **terrorism** has been a source of fear and disarray, inducing changes in behavior and prompting people to react to events irrationally. Just to give an idea, in 2016, 11 extremist occurrences took place (6 in Germany, 4 in France, 1 in Belgium), 138 people were killed and 548 injured and one of the most serious problem is that most attacks were carried out by Islamists living in the European Union, many of them European citizens. These security threats became a source of fear and panic. And there has been lots of causes to be afraid of in Europe. Subsequently, the psychological landscape of Europe has been transformed and traditional political behaviors have been altered in a most significant and unexpected way⁶. Menaces come mainly from the East and from the North of Africa. Barry Buzan, in 1993, even argued that security would determine the pace and scope, the success and failure of the European process.⁷

The **rise of the extreme right** is indeed a problem. In fact, as the 2011 crisis went by new political and social movements have been emerging, readdressing hope and enthusiasm, launching new popular solutions. The far right has been gaining impetus. The extreme left no so outstandingly.

Just to give an idea, for the 2016 elections, Kotleba (People's Party Our Slovakia), whose chairman is considered a neo-nazi, positioned against the euro, and against NATO is in Parliament and in government for the first time in a coalition with the Social Democracy. In Romania, the USR (Union for the Salvation of Romania), a catch all-syncretic party, emerging for the first time, got the third place and it is in Parliament now. In 2017, in Austria, the FPÖ (Freedom Party of Austria), an extreme right party, was third and is part of the government now. In the Netherlands, the PVV (the Party for Freedom), was second with 20 places (more 5 than before), but it is not part of the government and in Germany the AfD (Alternative for Germany) won, for the first time, 94 seats for the Bundestag. For the 2018 elections, in the Czech Republic, ANO (which means yes), a centrist, populist, liberal, syncretic party, won elections and constituted government. In Italy, a centre right coalition joining the Five Star party won elections and are part of the government now.⁸ And in Hungary, Fidesz, with Victor Orbán, won elections again.

But threats and challenges come from other different directions. **The 4th Industrial Revolution** tells us much about the future of the world. The internet, the cloud, big data, the artificial intelligence, the biotechnology and blockchain mean that 5 million jobs will be lost in the next 5 years and much more in the next years. In 30 years the world will be completely different. The European Union must be prepared. The smaller countries are certainly not prepared.

But the **citizen participation deficit** is also a dilemma. Citizenship and participation in the public sphere refer to an uneasy deficit in the European Union. Although the immense protests taken place in Brussels

⁶Neutel, Fernanda, *''Is the European Union Falling Apart?''*, Katoikos.eu, February 17, 2017, <http://www.katoikos.eu/analysis/is-the-european-union-falling-apart.html>.

⁷ Buzan, Barry, *From International System to International Society: Structural Realism and Regime Theory Meet the English School in International Organization*, Vol. 47, No. 3 (Summer, 1993), pp. 327-352.

⁸ The centre right coalition is constituted by: Northern League, Forza Italia, Democratic Party, Brothers of Italy; Free and Equal; Mixed Groups.

and sporadic referenda moments, most citizens feel there has not been space enough for participation and protest. Citizens have no perception of Europe's benefits.

3. Challenges for the future: making concessions or moving forward?

So, how can we sort out these problems? How can the European Union retake its precedent impetus? Does this mean that the European venture is dead? Should the European Union make concessions, keeping the status quo, or should it move forward reinventing scenarios and recreating new political configurations? The crisis, prompting an immense disillusionment, is also claiming for answers.

And, in fact, in March 2017, the European Commission put forward 5 scenarios of possible development.⁹ Citizens were engaged in the debate. Universities, local communities, official organizations were invited to promote it. The goal was to interact with the citizens and getting a close view of what they want for the future. Table 2 below gives a concise view of the proposed scenarios and a summary of possible consequences.

Table 2. Commission's five scenarios for the future

- 1- Carrying on as it is - we would have the same problems
- 2- Focussing on nothing more but the Single market- some fundamental dimensions would be left behind
- 3- Doing less more efficiently - the problems are encompassing, there is a constant spill over, there is a constant need to engulf other dimensions
- 4- Do more with only those who want to do more- this already exists, the Euro group countries, the Schengen countries, the PESCO countries, but it would legitimate a European Union with different degrees of integration, the gulf between countries would deepen
- 5- Doing much more together – it would mean the reinforcement of all policies, strengthened by the participation of all states; it would reinforce the decision-making process

Source: Author.

The first three scenarios mean a setback. If there are problems as mentioned before, they must be fixed. *"Carrying on as it is"*, *"focussing on nothing more but the single market"*, *"doing less more efficiently"* fall exactly on this premise: the problems would be the same, some fundamental dimensions would be left behind and the political and economic spill-over would no longer be possible or it would face more obstacles. In time, this might probably mean the implosion of the system.

But scenario 4 *"do more with only those who want to do more"* is different. Many politicians and countries have been in favour of this options for quite a long time, particularly France and Germany. The idea of having a core group of states moving forward and choosing the political/economic areas to do so is very appealing. Some talk about the founding fathers, some about the Euro zone group countries, some others consider that those states which can or/and are willing to do so should go ahead. But then again, it would be a setback in the project in the sense that it would determine a changing trend. It would imply digging a definite and deep gulf between those which go ahead and the others. Nobody would feel good at the end. Eventually and arguably.

⁹ https://ec.europa.eu/commission/white-paper-future-europe/white-paper-future-europe-five-scenarios_en, (accessed 19, June 2018)

Scenario 5- *moving forward by doing much more together*- seems more appropriate. It would mean: a) the usual trend of the process; b) the sense of belonging because all states would be part of the project; c) the states altogether would mean more political power; d) it would give the European Union more possibilities to develop itself for a lot of reasons.

First, it would reinforce synergies to empower the single market and trade, strengthening its commercial side and emphasising the European Union role to speak as one in trade. It would more easily tackle unemployment, it would help in developing the field of energy, digital programs and services. It would eventually make possible the emerging of several "silicon valleys" to host clusters of start-ups, large companies, and research centres.

Second, it would deepen the economic and monetary union, which could boost jobs creation, making convergence more possible. Additionally, European Union financial support should be made available to boost economic development and respond to shocks at regional, sectoral and national level. It would also create synergies to bring in more countries to the single currency.

Third, a European Defence Union should be created, reinforcing a foreign policy and thus a joint approach on migration, enlarging the neighbourhood policy and other relations which eventually would help in creating new economic opportunities. At the end, it would help in developing structures to make the European Union richer, it would help the Union to be a more important partner at global level and it would help in protecting the citizens of the European Union.

But moving forward should also mean bringing into the debate the grass root dimension which means the citizens' dimension. The European Union has been an elitist building process led by politicians and bureaucrats. The permissive consensus has been on the agenda for a long time. Some national referenda have happened (the Constitution 2005, Brexit-2014), but it has not been enough. Citizens' dissatisfaction needs a channel. The European society wants to be heard. Peoples claim for a place in the debate.

And, in fact, the world is entering a new phase. The European Union as well. A post party system whereby new models of participation in the democratic system of representation might occur. A new phase whereby movements of citizens assemble in conventions, presenting ideas, putting forward projects, building up new programs and ideas. In fact, citizens should be able to vindicate. They should be able to redesign the European Union's architecture project. So, it is important to ask them: what do they really want? How do they figure out the European Union? How to build up the process?

But the European Union should also rethink its communication channel. Brussels connects with citizens through press releases and short conferences by the end of meetings. But that is not enough. Although, the Commission is trying to sort out this problem by making informational gatherings of people in every country, it is necessary to do more. Communication is fundamental for any sort of integration. News stemming from the European Union should circulate differently.

Finally, I would mention another dimension: education. In fact, the educational system of the European Union should be redone. In schools, the young people should learn more about the way the European Union works, what it does and how it affects peoples' lives.

Conclusions: Accounts for the reconfiguration of the system

Many argue that the Union's dilemmas will only meet answers at European institutional level, calling for an overwhelming deep reconfiguration, demanding a redefinition of the main legislative lines and a reform of European politics and policies. Following this line of reasoning a new Constitution, endorsing a Constitution might be a solution. But there are other possibilities.

Choosing scenario 5- *moving forward by doing much more together*- to be the root for development in Europe, signifies an option that argues that political power brings encompassing possibilities by taking along all countries. It would give the Union more power to negotiate as a global actor and it would give it more internal power as well. But *moving forward with those who want it*, like the Euro zone group, which is an option endorsed by some important European Union states, will also give the project very significant and outreaching possibilities.

No doubt, the European Union is the most complex political system in the world. It helped in building theories and in rephrasing others. It helped in reasserting a new political system and in devising new institutional approaches. It is a landmark for other integration processes, a novelty, a remarkable story with outstanding synergies. But the project is facing one of its most challenging moments. Either it chooses the right pattern of development or it might implode.

The evolvement of the European Union story is an incognito. However, the European Union has always surpassed crises and dilemmas. Consequently, it has all the possibilities to better the present state of inertia, providing it chooses the right patterns of development. But, whether it will be able to give the final step, remains a case to be seen. Notwithstanding, the urgency claims.

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**ROSA MARIA VELAZQUEZ SANCHEZ¹, JOAO GABRIEL BOTO DE MATOS CAEIRO²,
JESUS GOMEZ VELAZQUEZ³ AND HONORIO ANTONIO GARCIA⁴**

**PERMANENCY INDICATORS OF TRADITIONAL TOURISM ENTERPRISES IN PUERTO
RICO AND PUERTO ESCONDIDO, MEXICO**

Abstract

Conventional tourism which offers sun and beach destinations has fueled the growth of establishments related to tourism and restaurant sector. In areas such as the Caribbean and the Mexican Pacific it is observed that many of the tourist establishments over thirty years of operation continue to provide their services. As can be seen in the area of Great Tourism, hotel facilities and services modernize and acquire new policies. However, a large number of hotels of small or medium size support their existence in an austere and traditional service. Based on studies conducted by (Gómez-Velázquez, Marquez Alburquerque, & Velazquez-Sanchez, 2015), (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015), this research was proposed to analyze comparatively indicators that define the permanence of the traditional tourism establishments in tourist destinations in Old San Juan, Ponce, Guaynabo and Isabela in Puerto Rico and Zicatela and Puerto Escondido in Oaxaca Pacific Coast of Mexico. Eight hotel establishments in Puerto Rico Island were analyzed by (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015) and eight establishments located in Zicatela and Puerto Escondido, Oaxaca, Mexico were analyzed. The results showed that managers identify aspects of service, adaptation to new technologies and elements from traditional tourism that preserve and form a balance with the elements recently acquired. The classic hotel management with the adaptation of modern management elements explains the permanence of traditional establishments in Puerto Rico and Puerto Escondido, Oaxaca, Mexico. The results showed that the classic hotel management is an element that identify and value the visitors on sun and beach destinations.

Keywords: Indicators, permanency, tourism enterprises, hospitality management, traditional hospitality management.

JEL Codes: L83, M14, M51

Introduction

The problem is the situation of the local traditional hotels in Old San Juan, Ponce, Guaynabo and Isabela in Puerto Rico and Zicatela and Puerto Escondido in Oaxaca, Mexico. The situation of sun and beach tourism is among the great tourism development and the continuity of the practices from traditional hospitality management since 1970. Puerto Rico and Puerto Escondido are embedded in tourist attractions sites that are characterized by having some beautiful natural landscapes and cultural elements. However, there is a big difference between great tourism and traditional tourism management, which have been observed in studies such as (Gómez-Velázquez, Robles Maldonado, Velazquez-Sanchez, & Morales Santiago, 2015). Because of the similarities in the peak period of tourism of the 70s in the destinations of Puerto Rico and Puerto Escondido and with the premise that there are indicators of permanency, was raised as a research question: What are the indicators of traditional management and modern management in the permanency of traditional establishments in Puerto Rico and Puerto Escondido, Mexico?

¹ Universidad Autonoma Benito Juarez de Oaxaca, Mexico, romavesa205@yahoo.com.mx.

² Universidad Autonoma Benito Juarez de Oaxaca, Mexico, caeirojoao@gmail.com.

³ Instituto Politécnico Nacional, Mexico, agame_velasquez@hotmail.com.

⁴ Universidad Autonoma Benito Juarez de Oaxaca, Mexico, honorioantonio@hotmail.com.

This research is organized as follows. In the section of literature review, the available results of the study spent in tourism businesses in Puerto Rico and in Puerto Escondido Mexico, the analysis of the concept of permanence and the comparison on the indicators used are presented to assess old and new tourist services. In the Methodology section, the characteristics of the sample, the operational definition of the variables, the procedure for applying and application of interviews and data analysis are included. In the results section tables are used to facilitate data presentation and brief explanation. The findings allow comparing the results with the initial objective and show the relevance of this study to the understanding of the factors of permanence as elements for the development of tourism businesses in Puerto Rico and Mexico.

Literature review

According to Ortuño (1990) in (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015) the demand for mobility expressed by tourism, and inspired by an imaginary drives the subject to travel. This subject aims to find a number of items that their imaginary integrates through suggestions to previously acquired inspirations. For Villa Real (2007 p.13), the tourist is looking for a complete package of fun, entertainment, wellness, hygiene and courtesy. Puerto Rico despite not having a traditionally culturalized service and as old hospitality experience as in the case of France, Spain and Italy from the 70's and through the marketing of tourism in the Caribbean became popular around the world, the development of micro, small and medium-sized regional hotel companies in the Capital Area of San Juan and later in other parts of the island increased. Many of these companies that began operations in the early 70's born approaching towards international tourism and remain operating since these dates with a distinctive touch of authentic, latent and constant entertainment which can resemble the type of tourism that was observed (Velazquez-Sanchez, Gómez-Velázquez, & Solana Vasquez, 2014) in Mexican communities.

Thanks to marketing of adventure tourism and surfing, Puerto Escondido became popular first on national level and later around the world. Puerto Escondido started with traditional establishments but the rate of tourist visitors increased when modern infrastructures were installed. Despite the presence of modern hotels, many establishments remain being traditional as an alternative for tourism conservative as those observed by (Gómez-Velázquez, Robles Maldonado, Velazquez-Sanchez and Morales, 2015) in establishments in Puerto Rico.

In the international level in the context of the 70s, with the expectation of foreign tourism market, certain standards and features that today are likely to be obsolete settled, but at that time were the best. Recently it has been conducted to identify indicators of permanence in Puerto Rico (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015) and in Puerto Escondido, Mexico, so in this study were comparatively analyzed the characteristics allowing the continuity of establishments in Puerto Escondido and a comparative analysis of the results in Puerto Rico, to identify the balance between classical and modern management enabling retention of traditional hotels in both destinations.

Methodology

The analysis of results from the sample of eight providers of traditional tourist services in Puerto Rico (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015) was performed and the semi-structured interview to eight providers was applied to tourist services in Zicatela and Puerto Escondido in the southern State of Oaxaca, Mexico, with questions designed to review the characteristics that define the permanency of tourism enterprises.

The variables were reviewed: Categories of traditional management practices and categories of contemporary or modern management: the data obtained allowed to make a first approximation, identification and definition of indicators of permanence and adaptation between traditional and modern elements of tourism management in Old San Juan, Ponce, Guaynabo and Isabela in Puerto Rico and Zicatela and Puerto Escondido in the Pacific Coast of Mexico.

Operational definition of the variables

- **Elements of traditional hospitality management.** It was considered as a numerical variable based on the indicators of authenticity, initial own techniques and adaptation. It was measured under the answers of respondents in the sample.
- **Elements of contemporary-modern hospitality management.** It was defined by the services offered and considered as a numerical variable. It was measured based on the answers given by providers or managers of tourism businesses.

Table 1. Operational definition of traditional hospitality management and contemporary or modern hospitality management

VARIABLES	CATEGORIES	INDICATORS
Elements from Traditional Hospitality Management	Authenticity	Originality Philosophy Offered Services Market Targeted
	Own Initial Techniques	Host Attention Information Systems Management
	Adaptation	Added Elements Competence Norms Owners/Managers Change
Elements from Modern Hospitality Management	Innovation	New Services Growth and Contracts Reshuffle Changes on Management Agreements
	Technologies	Incorporated Technologies Infrastructure Equipment
	Marketing	Printed Media Electronic Media Market Analysis
	Leisure	Sports and Activities Agreements for Leisure Enterprises Natural Tourist Attractions Cultural Tourist Attractions Environment

Table 1. Categories and indicators of traditional and contemporary/modern hotel management variables are observed. The variables are numeric and included in the analysis of the relationship between the initial services and categories of modernity under adaptation in 16 tourist destinations.
Source: Authors.

Procedure description

According to (Gómez-Velázquez, Robles Maldonado, Velázquez-Sánchez, & Morales Santiago, 2015) based on the data obtained from PRHTA (Puerto Rico Hotel & Tourism Association), four places where eight establishments were selected along Puerto Rico island are described and with the data from SECTUR (Ministry of Tourism in Mexico) the eight establishments in Puerto Escondido were selected; they are included in Table 2. To be analyzed comparatively under the requirements of Traditional Hospitality Management and Contemporary/Modern Hospitality Management.

Table 2. Sample of tourism enterprises held in Old San Juan, Ponce, Guaynabo and Isabela in Puerto Rico and in Zicatela and Puerto Escondido, Oaxaca, Mexico

	TURISM ENTERPRISE	PLACE OF LOCATION
1	El Convento	San Juan, Puerto Rico
2	Plaza de Armas	San Juan, Puerto Rico
3	Viejo San Juan	San Juan, Puerto Rico
4	Fortaleza Guest House	San Juan, Puerto Rico
5	Hotel Bélgica	Ponce, Puerto Rico
6	Hotel Meliá	Ponce, Puerto Rico
7	Hotel El Guajataca	Guaynabo, Puerto Rico
8	Parador Villas del Mar	Isabela, Puerto Rico
9	Hotel Chegüe	Puerto Escondido, México
10	Hotel Paraíso Escondido	Puerto Escondido, México
11	Hotel Casa Vieja	Puerto Escondido, México
12	Hotel Rockaway	Zicatela, México
13	Hotel Acalí	Zicatela, México
14	Hotel Casa de las Iguanas	Puerto Escondido, México
15	Hotel Nayar	Puerto Escondido, México
16	Hotel Bungalows Puerta del Sol	Zicatela, México

Table 2. Eight tourism enterprises analyzed by (Gómez-Velázquez, Robles Maldonado, Velázquez-Sánchez, & Morales Santiago, 2015) are shown, which are located in four sites of Puerto Rico and eight establishments analyzed in Zicatela and Puerto Escondido, Oaxaca, Mexico.
Source. Authors.

Tourism enterprises analyzed in Puerto Rico

El Convento. Located in Old San Juan. It began as a project powered by Bootstrap Woolworth in 1962. The main reason why people stay here is tourism and its location in Old San Juan. Services provided are lodging with 8 rooms with hot water, air conditioning, fitness center, three restaurants, business center, Valet Parking, Beach Club, Meeting room, pool, laundry and botanical garden. Apparently they not have loyal customers. They increase prices in high seasons. Recently there have not suffered casualties in its tourist influx. Its market is geared towards large tourism in the historic center.

Plaza de Armas. Located in the historic center of San Juan with more than 60 years in operation. There was a change of administration that did not interrupt the operations of the company. It offers service in English and French. They have developed marketing on the island and abroad, as well as cooperation agreements with local companies. They increase prices in high seasons. Apparently they not have loyal customers. Their revenue is based on foreign tourism and mainly from cruises. There were conflicts with the cruise lines and port management that affected their income.

Viejo San Juan. Old guest house in the historic center of San Juan. It began operations in 1925. It changed management when first owner died intestate in 1957. It began its operations with 5 people today are 10. They do not have any marketing or technology for reservations or online payments. It has private rooms with shared bathrooms, four dormitories and camping terrace. Their prices not increase in high seasons and they have not suffered casualties in its affluence. They have faithful clientele since years. Its market focuses on casual tourism.

Fortaleza Guest House. Is a small traditional establishment in the historic center of San Juan. It is offered as Guest House with nine double and quadruple shared rooms, four of them with balcony. They not have attention in other languages but there are some benefits such as self-service kitchen and laundry. Hostelsworld.com cater reservations. Their prices not increase in high seasons and they have not suffered casualties in its affluence. They have loyal customers. Its market focuses on the backpacker tourism.

Hotel Bélgica. Located in Ponce, the second largest metropolitan area by size on the island. It began operations in 1886. It has had several owners from different families. Since 1995 it works by a family and workers are relatives or friends. It offers service in English. They have cyber marketing and online reservation systems. They have rooms in different categories. It takes the advantage of being a strategic point for tourism throughout the island. It has suffered damages in revenue from natural issues such as hurricanes and floods. They have loyal customers. Its market focuses on older people.

Hotel Meliá. Also located in Ponce, is a hotel since 1890 opened by a Spanish family and managed by them until 1960, when changed to an American family. It recently passed to hands of a villager. It has not suffered interruptions in their operations. It features amenities such as Wi-Fi, pool, business center. It has reservations online and social networks. It has suffered damages in its revenues because of nature issues. Apparently they not have loyal customers. Its market focuses on local family tourism and business.

Hotel El Guajataca. It is a tourism “parador” (Funded through Puerto Rican Government Aid) – Located in a beautiful beach in the north of the island, built in 1930 serving as tourist stop being an historical attraction with the beach and the tunnel as well as appreciation of the natural environment. It has a spa, swimming pool, Jacuzzi rooms and restaurant. They have social media marketing and local advertising if there are events. They have not suffered declines in their revenue recently. They have a new administration. Its tourism market focuses on relaxation, adventure and family.

Parador Villas del Mar. It is a complex located in the north of the island, the autonomous district of Isabela. It began operations in 1950, since it has not paused its operations. It is characterized by alternative technologies such as solar cells and wind generators. They have different sized cabins with ocean view and beachfront. Similarly they have a garden of lettuce and tubers. They have special features such as the arrival of turtles, manatees and whales in certain times of the year. It has online marketing, reservations and television programs abroad, as caribbean vacations and

places to go. They suffered some decreases in their tourist influx by social contingencies in 2001 and hurricanes.

Tourism enterprises analyzed in Puerto Escondido, Oaxaca, Mexico

Hotel Chegue. It is located in Agua Zarca Street, next to Hippocampus Restaurant in Colonia Agua Marina. Currently it has 14 rooms, 2 singles and 12 doubles, which features are Wi-Fi, paid TV, hot water and fan. The hotel has a hammock area and parking for small cars.

Hotel Casa Vieja. The hotel is located in Pérez Gazga Avenue, cobblestoned center area. The hotel offers 20 rooms, 6 doubles and 14 with king size, they have paid TV, Wi-Fi, hot water, air conditioning and fan. It has regional crafts store.

Rockaway Hotel Boutique. It is located in the heart of Zicatela beach, world renowned for its big waves. The hotel has its own style, with 32 rooms and 12 apartments, a restaurant, two swimming pools, a gym equipped with air conditioning, “Adala” conference lounge area a childr stay with babysitters and has a shopping area with several boutiques. The hotel also offers massage/spa, hot water, paid TV, WI-FI throughout the hotel, laundry. The hotel is promoted in social networks, familiarization trips, tourist blitz and airline magazines and some local advertising. Its market is oriented towards people looking for a pleasant stay or leisure tourists.

Hotel Nayar. It is located in the main avenue Perez Gazga, just a few minutes from the tourist cobblestones and the main beach. They offer standard rooms, and these have air conditioning, cable television, and WI-FI. It has reservations online, social media marketing and local advertising. The restaurant offers the best of regional and national cuisine. Its tourism market focuses on relaxation, adventure and family.

Hotel Paraíso Escondido. It is located in Puerto Escondido Downtown, having 20 rooms, each with two double beds, air conditioning, private bathroom and local TV. Those rooms found on the first floor have direct access to the pool and restaurant area, the second floor have balconies to the main bay. The suites feature a king-size bed, air conditioning, terrace and a shared kitchenette. The master suite contains two double beds, air conditioning, TV, terrace, kitchenette and mini pool. The hotel has a pool, parking, WI-FI and the restaurant is only open in high season.

Hotel Acali. It is located in the world famous Zicatela Beach. It has 20 cabins and bungalows. The beach houses are built with precious woods of the region. Their roofs are of clay tile, shingle walls and wooden floors, which allow good ventilation and freshness in their interiors. All cabins have private bathroom, ceiling fan, WI-FI, closet, chest of drawers, tables and chairs, mosquito nets, daily maid service, overlooking the pool and garden. Some cabins have air conditioning, kitchen, refrigerator, private terrace with hammocks and panoramic view overlooking the sea. The hotel has bar, pool, telephone service, parking, surf lessons, rental skis, boat rides and laundry.

Hotel Casa De Las Iguanas. It is located just few meters from Zicatela Beach. Iguanas Surf House and Hotel offers 12 double and triple rooms with air conditioning, ceiling fan, safe, cable TV, private balcony or terrace and a very special design for the most discerning guests. The hotel features whirlpool Jacuzzis, bar services within the pool, jumping waterfalls, comfortable chairs and umbrellas, etc. It offers excursions to the most unusual places, transfers to unknown beaches, surf lessons for beginners and experts. Snack Bar features the most exclusive drinks and board games with a good atmosphere.

Bungalows Puerta Del Sol. It is located in front of Zicatela Beach; from the rooms it is possible see the beach. The hotel has 17 single rooms and 2 departments. Bungalows Puerta del Sol offers not only accommodation at a reasonable price but also the following services: pool, kitchen, parking, air

conditioning, wireless internet, Spa massage and Temazcal, laundry service, cable TV services, cars and bikes for rent and travel agency for activities and tours.

Data analysis

The factorial analysis of the data from the interviews applied to managers of establishments in Puerto Escondido and Puerto Rico was performed. The results showed the formation of two factors in variable elements of Traditional Hospitality Management: (Authenticity and Own Initial Techniques); three factors in variable Elements from Modern Hospitality Management: (Innovation and Technologies, Marketing and Leisure) and one factor in variable Elements from Adequacy Hospitality Management: (Adaptation) Table 3.

Table 3. Factors in variables elements of hospitality management

VARIABLES	CATEGORIES	INDICATORS
Elements from Traditional Hospitality Management	Authenticity	Originality Market Targeted Guest Services Philosophy Offered Services
	Own Initial Techniques	Host Attention Information Systems Traditional Management Added Services
Elements from Modern Hospitality Management	Innovation and Technologies	New Services Growth and Contracts Incorporated Technologies Infrastructure Equipment Modern Management
	Marketing	Printed Media Electronic Media Market Analysis
	Leisure	Sports and Activities Agreements for Leisure Enterprises Natural Tourist Attractions Cultural Tourist Attractions Environment
Elements from Adequacy Hospitality Management	Adaptation	Added Elements Competence Norms Owners/Managers Change Agreements Reshuffle

Table 3. The results obtained from the factorial analysis showed six categories; five indicators for Authenticity, four indicators for Own Initial Techniques, six indicators for Innovation and Technologies, three indicators for Marketing, five indicators for Leisure and six indicators for Adaptation.
Source: Authors.

Results

With the results of the sixteen establishments analyzed in this study, indicators for explaining the permanence are included and can be observed. The featured categories are authenticity or traditional management, modern management and adequacy of which are shown in Tables 4 and 5.

Table 4. Indicators of permanence identified in tourism service providers in Zicatela and Puerto Escondido, Oaxaca, Mexico

TOURISM ENTERPRISE	VARIABLES	HIGHLIGHTED CATEGORIES	INDICATORS
Hotel Chegüe	Elements from Modern Hospitality Management	<i>Highlights with Technologies added, with infrastructure relatively new and Innovation through modern management.</i>	Equipment Infrastructure New Services Modern Management Incorporate technologies
Hotel Casa Vieja	Elements from Modern Hospitality Management	<i>With emphasis on Marketing, as its location is a very good sales strategy. Recreation stands as it has agreements with companies offering trips.</i>	Market Analysis Sport and Activities Cultural Tourist Attractions
Hotel Rockaway	Elements from Modern Hospitality Management	<i>It is based on Innovation, since its structure is completely new and its Marketing is focused on promoting. The location is in a very attractive place.</i>	Incorporate Technologies Market Analysis Agreements for Leisure Enterprises
Hotel Nayar	Elements from Traditional Hospitality Management	<i>It highlights the authenticity, as it was one of the first hotels. Initial Techniques and still becomes to the same owners.</i>	Originality Guest service Traditional Management
Hotel Paraíso Escondido	Elements from Adequacy Hospitality Management	<i>It emphasizes authenticity by years of operating. Initial Techniques and its administration has remained familiar.</i>	Reshuffle Agreements Added Elements
Hotel Acalí	Elements from Adequacy Hospitality Management	<i>Despite highlighting the Authenticity for being the first hotels in the region with initial own techniques, as it remains the same owner, Adaptation to information technology to promote despite competition arises.</i>	Agreements Owners/Manager Change Added Elements Reshuffle Agreements
Hotel Casa de las Iguanas	Elements from Traditional Hospitality Management	<i>Classical attention and incorporation of technologies and infrastructure. Marketing for its physical environment. Recreation, as it has agreements with companies that offer recreational activities.</i>	Traditional Management Market Target Agreements
Hotel Bungalows Puerta del Sol	Elements from Adequacy Hospitality Management	<i>Of Authenticity, it is because it was one of the first hotels. Initial Techniques, to remain in the same family. Adaptation, as it has strong competition to it is the surrounding hinterland. Recreation on the agreements it has with other companies.</i>	Added Elements Agreements Reshuffle Owners/Manager Change

Table 4. The results obtained from the analysis of data from interviews to eight owners or managers in the tourist destination Puerto Escondido are showed. In the results identifying factors of permanence and adaptation to new elements, mainly technological highlights. It can be observed the results on the island of Puerto Rico (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015).
Source: Authors.

Table 5. Indicators of permanence identified in tourism service providers in Old San Juan, Ponce, Guaynabo and Isabel in Puerto Rico

TOURISM ENTERPRISE	VARIABLES	HIGHLIGHTED CATEGORIES	INDICATORS
El Convento	Elements from Traditional Hospitality Management	<i>Authenticity to be a modern supply in the years of its opening. Technologies for the integration of infrastructure and new equipment after remodeling.</i>	Guest Service Traditional Management Added Services Philosophy
Plaza de Armas	Elements from Modern Hospitality Management	<i>By integrating factors and occupying updated hotel management techniques. Innovation integrating new services, contracting, remodeling, management changes and external agreements.</i>	Technologies Added Services Sports and Activities
Viejo San Juan	Elements from Traditional Hospitality Management	<i>Authenticity based on the then-new concept guest house</i>	Guest Service Originality Philosophy
Fortaleza Guest House	Elements from Traditional Hospitality Management	<i>Being a very basic classic management company</i>	Originality Guest service Traditional Management
Hotel Bélgica	Elements from Adequacy Hospitality Management	<i>Authenticity when combines Being a family business with new techniques. Initials owners but with modern elements such as adaptation to technologies and marketing.</i>	Guest Service Modern Management Added Services
Hotel Meliá	Elements from Adequacy Hospitality Management	<i>Initial Techniques for the specialized administration. Adaptation for harmony between old and modern elements. Innovation by changes in the management and growth</i>	Added Services Agreements Reshuffle Owners/Manager Change
Hotel El Guajataca	Elements from Adequacy Hospitality Management	<i>For authenticity giving a varied offer. Adaptation by integrating modern factors. Innovation for change between hostel and hotel. Recreation includes sports and nature tourism factors</i>	Added Services Agreements Reshuffle Owners/Manager Change
Parador Villas del Mar	Elements from Adequacy Hospitality Management	<i>The authenticity of the initial Techniques, Adaptation, Innovation, Technology, Marketing and Recreation</i>	Agreements Added Services Owners/Manager Change

Table 5. The results obtained from the analysis of data from interviews to eight owners or managers in the tourist destination Puerto Rico are showed. In the results identifying factors of permanence, adaptation and Adequacy to new element. It don't can be observed in the results on the island of Puerto Rico (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015). Source: Self-Elaboration. Source: Authors.

As Fortaleza Guest House, El Convento and Viejo San Juan highlighted the authenticity-management category **traditional hospitality management**. Continuity in the management of services and personalized attention to guests is evident. The same indicators were observed in Nayar Hotel and the Hotel Casa de las Iguanas in Puerto Escondido. The main match is because

they include low prices allowing them to have a customer base and customer base, which mostly are frequent customers, enabling their stay.

Adequacy hospitality management category was observed in Parador Villas del Mar, Hotel El Guajataca, Hotel Bélgica and Hotel Melia in Puerto Rico, in fact as in the Acali Hotel, Hotel Paraiso Escondido and Hotel Bungalows Puerta del Sol in Puerto Escondido, Oaxaca-Mexico. The indicators highlighted in an integration of classical elements including personalized guest service, classic elements of service but with modern elements such as integrating information technologies for booking, incorporating modern equipment in bedrooms. Adequacy is the factor that determined the remained of such establishments.

Meanwhile in the category of **modern hospitality management**, Plaza de Armas, Puerto Rico and Hotel Chegue, Hotel Casa Vieja, Hotel Boutique Rockaway in Puerto Escondido-Mexico include indicators of innovation. The management changes are highlighted by marketing, modernization of facilities and the incorporation of advances in technology and communication.

Conclusions

Analyzing the results of the sixteen establishments, it is possible to identify indicators that may explain the permanence of establishments providing hotel services and dating from the 70s in traditional places of Old San Juan, Ponce, Guaynabo, Isabela in Puerto Rico and Zicatela and Puerto Escondido in Mexico. They highlighted three categories Traditional Management, Modern Management and Adequacy Management unlike raised by (Gómez-Velázquez, Robles Maldonado, Velázquez-Sanchez, & Morales Santiago, 2015), who found only Operation and Management Modern or Traditional.

The low cost service and personalized guest service were most important indicators to define the classic management in the permanence of hotels with the Traditional Management category. The adaptation of services and infrastructure in the permanence manifests as a tourist service in hotels that are characterized by the Adequacy Category and growth potential was observed and there is work together for communication and collaboration with other tourism businesses. Innovation, modernization of infrastructure, implementation of communication technologies and partnerships with companies to complement services distinguish the hotels category of Modern Management.

The results allowed identifying three categories of hotel management and indicators of each, allowing show a match between the establishments that remain in the destinations despite the time, modernity and competition from large hotels. Also noteworthy is the result showing the categories for greater transfer was observed towards the category of Modern Management in Puerto Escondido hotels compared to Puerto Rico in which greater tendency to preserve the classic management was observed.

The results obtained in this research allow answering the research question. Indicators of modern hotel management and traditional hotel management can explain the permanence of classic hotels in the destinations of Puerto Rico and Puerto Escondido. There is a coincidence in the indicators of Classic Management and Modern Management and a new category named Adequacy Management was integrated which is defined by an inclusion of modern management with the conservation of the main elements of traditional management conserving elements of traditional hotel management allowing adaptation to new techniques and technologies hotel achieves a harmony and then a high value of permanency.

The results contribute to the body of literature with a methodology to assess the relevance of the hotel practices in Puerto Rico and Puerto Escondido, Mexico. The assessment of the importance of adaptation elements for the preference of the visitor can see the advantage in the variable representing tourist influx. It also contributes to the knowledge of the strategy of the adequacy of the classical or traditional hotel techniques with modern practices.

Limitations

Within the limitations of this study can be considered the characteristics from the perspective of tourists. The time the study was conducted. The small variability between owner and manager interviewed. Tourist companies analyzed. So they could be carried in other regions or countries and other periods of visitation.

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ROSALIA CASTELLANO¹, GAETANO MUSELLA² AND GENNARO PUNZO³

EXPLORING THE DETERMINANTS OF SEPARATE WASTE COLLECTION FROM A SPATIAL PERSPECTIVE

Abstract

A virtuous waste management is one of the main pillars of EU environmental policies. The European directives aim at minimising the waste generation and increasing the separate waste collection level. As a Member State, Italy is not far from the European targets, nevertheless it is characterised by wide regional differences. Some areas, especially in the South, experienced waste management crises mainly due to a failure to properly collect and separate urban waste. This makes Italy a noteworthy case study in the waste management framework. Our main research question is to assess the effects of different factors (i.e., socio-economic and morphological backgrounds, institutional quality, and individual motivations) on citizens' recycling behaviours. For this purpose, we analyse the determinants of separate waste collection by comparing two regions of Southern Italy, Sicily and Sardinia, characterised by opposite results in terms of separate waste collection. By using spatial econometric models, we examine whether virtuous waste management performances are driven by political dynamics rather than extrinsic motivations, such as social influence or monetary incentives, or intrinsic motivations, such as pro-environmental attitudes. The main finding is that extrinsic motivations, although important, are not the only driving forces behind the good waste management performances. The intrinsic motivations also play a key role: specifically, individual pro-environmental attitudes, knowledge and commitment to differentiate. In general, Sardinia performs better than Sicily. This advantage is explained by a more effective combination of factors (local institutional quality, monetary incentives, and citizens' good actions) and synergy between local governments and citizens.

Keywords: Separate waste collection, pro-environmental behaviours, local governments, spillover effects

JEL Codes: C21, Q53, Q58, R11, R5

1. Introduction

Nowadays, waste management represents crucial environmental issue attracting the attention of the European Union in an ever-increasing way. The European Commission has published several waste Directive aimed at encouraging sustainable development and environmental protection. In particular, the Waste Directive (WD, hereafter) 2008/98/EC identified the basic concepts and definition related to waste management (e.g., definition of waste, recycling and recovery), requiring that Member States adopt waste management plans in which the main objective is the prevention (i.e. reduction of the amount of waste generated). Then, the WD establishes an order of precedence in waste treatment actions: reuse, recycling, recovery and disposal setting. In this light, the separate waste collection (SWC, hereafter) becomes the pillar of the virtuous waste management system. Europe has enabled specific regulations regarding the waste management of a country, which encourage a sustainable development

¹ University of Naples "Parthenope", Department of Management and Quantitative Studies, Naples, Italy, lia.castellano@uniparthenope.it.

² University of Naples "Parthenope", Department of Management and Quantitative Studies, Naples, Italy, gaetano.musella@uniparthenope.it.

³ University of Naples "Parthenope", Department of Economic and Legal Studies, Naples, Italy, gennaro.punzo@uniparthenope.it.

through the enhancement of the separate waste collection operations. For this purpose, it is necessary that the EU legislation is accompanied by specific national waste management strategies.

In Italy, waste management is currently regulated by Legislative Decree 152/2006 (L.D. 152/2006), updated in 2010 (Decree 205/2010) to implement the guideline of the 2008 EU Directive, which sets the main regulatory pillars. The L.D. 152/2006 establishes an administrative hierarchy in terms of waste management: *i*) the regions issue regulations in compliance with the national legislation and define the waste management strategies; *ii*) the provinces coordinate the municipalities' waste management and identify instruments for separate collection, enhancing implementation of the regional waste management plan; *iii*) the municipalities are in charge of municipal waste collection and disposal and collect charges for managing waste. Moreover, the L.D. 152/2006 sets three targets to be achieved: 35% by 2006; 45% 2008; 65% by 2012.

The administrative system may be insufficient to achieve virtuous levels of separate collection. In fact, it is generally agreed that individual decisions, likely driven by the pro-environmental attitudes, play a fundamental role in recycling programmes. Much literature investigates the complexity of pro-environmental behaviours (PEBs, hereafter) at the individual and societal levels from the various perspectives of legislation (Lanza, 1983), engineering (Noll, 1985) and social-psychological models and theories (Van Poech and Vandenabeele, 2012; Turaga et al., 2010; De Young, 1986; Burn and Oskamp, 1986). Studies from the legislative perspective address the effects on PEBs of legal measures; those from the engineering perspective consider alternative technological systems to waste recycling and management; and those from the social-psychological perspective provide moral frameworks for understanding and modelling PEBs (Turaga et al., 2010).

Based on the above, our aim in this paper is to analyse the determinants of separate collection by comparing two regions of Italy, Sicily and Sardinia, characterised by opposite results in terms of separate waste collection rate (SWCR, hereafter). In order to perform our analysis, we use data provided by the Italian Institute of Statistics (ISTAT) at the municipal level, which refers to 2012. Specifically, we proceed in two steps. First, we provide a general statistic summary of the waste management process with the purpose to verify if the potential factors on waste recycling attitudes may differ across locations. Then, by using a spatial econometric model, we examine whether waste management performances are driven by political dynamics rather than extrinsic motivations, such as social influence or monetary incentives, or intrinsic motivations, such as pro-environmental attitudes. The paper is structured as follows. Section 2 shows the context analysis. Section 3 describes the econometric model while the main empirical findings can be found in Section 4. Section 5 concludes.

2. Study area and stylized facts

Sicily and Sardinia are two regions of Southern Italy located in the heart of the Mediterranean Sea. The choice of these two regions as areas of interest reflects the third approach to comparison between geographical areas identified by Kohn (1989). Following this approach, we compare the regions taking into account the dimensions in which the regions vary (i.e., the effectiveness of the actions of their institutions to manage the heterogeneous patterns of SWC and citizens' attitudes towards pro-environmental behaviours), and their common socio-economic and institutional backgrounds (both are insular regions in the southern part of Italy with a special statute). As regions with special status (Article 116 of Italian Constitution), Sicilia and Sardinia have broader power and autonomy in legislation, administration and finance to make allowance for cultural differences and linguistic minorities.

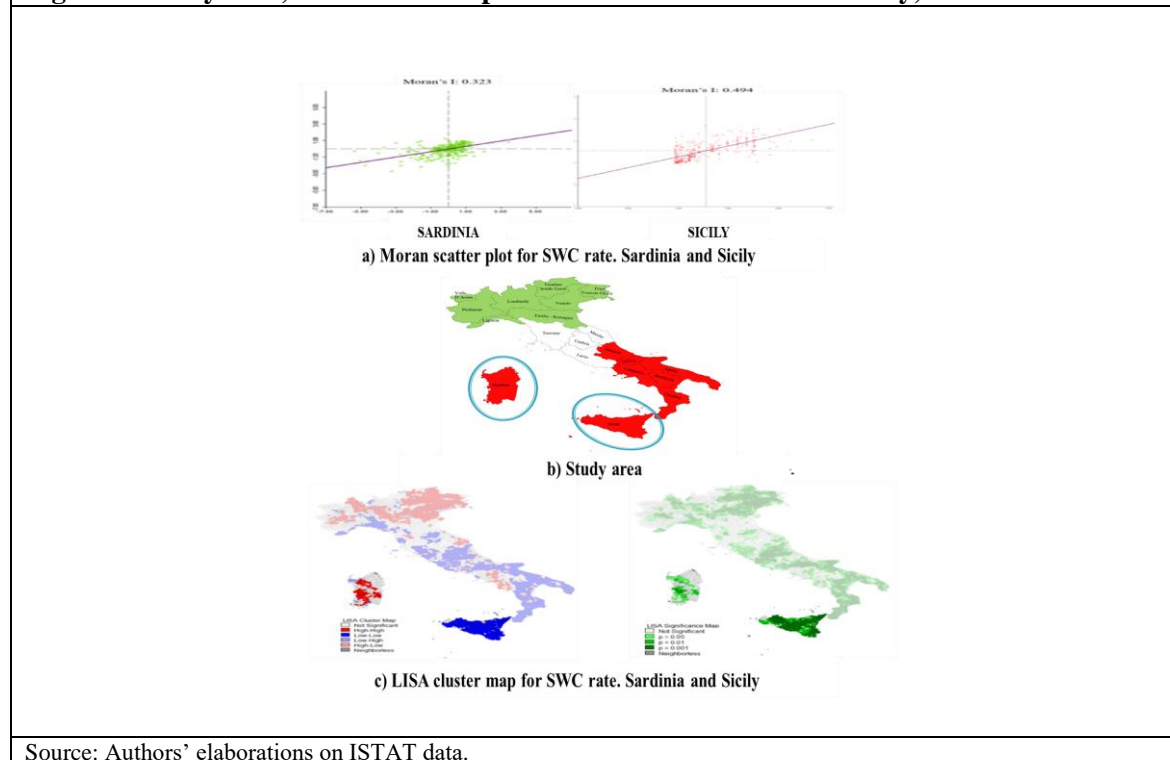
Sicily, which is separated from the Italian Peninsula by the Strait of Messina, covers a total area of 25,832 square km, and with over 5 million inhabitants, it is the most populous region in Italy

(approximately 8.4% of the national population) and the most densely populated island in the Mediterranean Sea (Istat online database). Most of the population is concentrated in large towns, especially along the northern and eastern coastlines. Sicily is administratively divided into 9 provinces and 390 municipalities, and its regional capital city is Palermo. From an economic point of view, in 2012, the regional GDP accounted for 5.4% of the national GDP; Sicily is also a very attractive tourist destination (with over 4.3 million tourist arrivals). However, the socio-economic growth of Sicily is limited by illegal activities and crime organizations that discourage private investments and restrict public institutions actions. In 2007-2013, the European Union, in an attempt to help local authorities, invested more than 60 million euros to convert former mafia properties into educational projects, agritourism sites and business centres. In 2012, the SWCR was 14.21% far below the national value (39.9%).

Sardinia is in the western Mediterranean Sea to the south of the French island of Corsica and covers an area of 24,100 square km. Since the 1980s, Sardinia has experienced population growth, which is essentially due to the rising number of foreign citizens (approximately 1.9% of the total population) and, in 2012, the population of Sardinia amounted to approximately 1,676,000 inhabitants. The Sardinian territory is administratively divided into 8 provinces and 377 municipalities, and its regional capital city is Cagliari, which together with Sassari is the region's most populous city. At the beginning of 2012, Sardinia's GDP amounted to 17,810 euros per capita, and the employment rate was 51.8%. In 2012, the SWCR was 57.74%.

In order to verify the existence of spatial dependence among the municipalities of two regions, in Figure 1 we show the global spatial autocorrelation (Moran scatter plot) and the local indicators of spatial autocorrelation (LISA).

Figure 1. Study area, Moran scatter plot and LISA. Sardinia and Sicily, 2012



As shown in Figure 1, the global spatial dependence of the separate waste collection rate (SWCR, hereafter) is significant in both regions, and it is much stronger in Sicily than in Sardinia (Moran's I equal to 0.494 and 0.323, for Sicily and Sardinia, respectively). The spatial distribution leads to the conjecture that the SWCR in a given municipality is heavily influenced by the related behaviours in neighbouring municipalities. To quantify the spillover effects among municipalities, we show the LISA cluster map that highlights interesting micro-concentrations of spatial dependence. The local Moran's I statistic detects significant spatial clusters of similar values. This measure identifies some "High-High" and "Low-Low" clusters where municipalities with high or low SWCRs are adjacent. Our results show significant clusters of high SWCRs in certain areas of Sardinia and clusters of low SWCRs throughout Sicily. This means that, while the poor results in SWCR of Sicily is also due to the indifference of its inhabitants to the environmental issues, the Sardinian citizens are more sensitive to environmental problems.

3. Empirical strategy

Our empirical analysis aims at understanding the main driving force being the separate waste collection. Many researchers highlight the importance of geomorphological, demographic, and socio-economic factors as well as the quality of institutions and spatial spillover effects (Mazzanti et al., 2008; Agovino et al., 2016a; Crociata et al., 2016a; Musella et al., 2018; Garofalo et al., 2018). In accordance with the above studies, we implement spatial autoregressive model (SAR) in order to take into account these factors and verify whether SWCRs are also characterised by spatial spillover effects. In the empirical literature, the SWCR is considered a good proxy of the pro-environmental attitude of individuals (Agovino et al., 2016a; Crociata et al., 2016a; 2016b) and the introduction of spatial effects allows us to distinguish between the internal and external effects. While the internal effects measure the impact of the variables on the municipality i , the external effects regard their impact on those municipalities which are contiguous to municipality i . SAR model consists of implementing a model that considers the spatial lag of the dependent variable in addition to the explanatory variables; formally, it is expressed as follows:

$$y = \rho Wy + X\beta + \epsilon \quad (1)$$

where y is the dependent variable (SWCR), W is the first order contiguity matrix (queen criterion); ρ is the autoregressive spatial parameter; X is the matrix of explanatory variables; β is the vector of coefficients associated with the regressors.

The spatial component introduces some endogeneity problems because the spatially lagged variables are typically correlated with the disturbance term (Anselin, 1988; Kelejian and Prucha, 1998). To overcome this problem, we use the instrumental variables (IV) and the two-stage least squares (TSLS) estimator. As argued by Anselin (2001), the IV allow capturing the exogenous share of the spatial component by using appropriate instruments that are simultaneously correlated with the spatially lagged variable and uncorrelated with the error term. Following the literature on spatial econometrics (Anselin, 1988; Kelejian and Prucha, 1998; LeSage and Peace, 2009), we use the exogenous covariates and their spatially lagged versions as instruments. Having the right number of instruments is a key issue of the procedure. Let m be the number of instruments and k the number of endogenous regressors, we can use the procedure if the regression coefficients are exactly identified ($m = k$) or overidentified ($m > k$). We test the over-identifying restrictions through the J test (Sargan, 1958, 1988; Hansen, 1982) that is distributed as a chi-squared with $m - k$ degrees of freedom (χ^2_{m-k}). The restrictions are valid when the null hypothesis is accepted. Once overcome the endogeneity problem, the coefficient of the spatially lagged variable can be estimated using the TSLS.

4. Data

Our analysis focuses on the waste generated by households, excluding the waste produced by other activities (e.g., construction or demolition), in the municipalities of Sicily and Sardinia for the year 2012. The information on the SWCR are collected by the Institute for Environmental Protection and Research (ISPRA). The SWCR – regulated by Art. 183 of L.D. 452/2006 (paragraph f) – represents the municipal waste separately collected as a percentage of total municipal waste (Agovino et al., 2016c). In order to perform the empirical analysis and investigate the factors determining waste management performances, we merged the data on SWCRs with a set of covariates taken from the Italian Institute of Statistics (ISTAT).

The choice of covariates aims to control the impact on SWCRs of some factors normally highlighted in literature. In particular, we consider the geomorphological, demographic, socio-economic, and institutional quality factors. The *overall surface area*, which refers to the square kilometres of the entire town, may affect SWCRs because if the surface area increases then the collection costs reduce (Domberger et al., 1986; Simões et al., 2012). The *elevation above sea level* may influence the operational complexity of the service and consequently its costs (Musella et al., 2018). *Population density* (the ratio of the number of people per square kilometre) may control for different land values and for economies of scale in waste management (D’Amato et al., 2015; Mazzanti et al., 2008). Controlling for the dummy variable “*Metropolitan area*” (1 if the municipality belongs to a metropolitan area and 0 otherwise) is important because larger areas may make the separate waste collection process more difficult mainly due to congestion problems (Garofalo et al., 2018). *Education rate*, expressed as the ratio of young people (aged 19-34) who have completed upper-secondary education to the total population of the same age-group can have a strong link with efforts in separate waste collection (Schultz et al., 1995; Callan and Thomas, 1997). *Unemployment rate* is the ratio of people, aged 16-64, who are unemployed (and seeking a job) to the overall labour force. Unemployment status may encourage pro-environmental behaviour in which the opportunity cost of the time spent to differentiate the garbage is likely to be lower for unemployed people (Hage and Söderholm, 2008). *Couples with children* is the share of couples with children of the total number of couples. Many studies show that pro-environmental behaviours are more common in people with altruistic values (Stern et al., 1995; Corraliza and Berenguer, 2000). This variable is a good proxy of citizens’ willingness to be involved in the separate collection process due to parents’ wish to maintain the environment in the best possible condition for their children (Musella et al., 2018; Garofalo et al., 2018). *Value added per capita* is the best proxy of the economic prosperity (Mazzanti et al., 2008) and one of the main driving forces of the waste management process (Mazzanti et al., 2008; D’Amato et al., 2015; Agovino et al., 2016b).

The *Institutional Quality Index* (IQI), proposed by Nifo and Vecchione (2014), represents a measure of the Italian institutional quality. Inspired by World Governance Indicator (WGI) proposed by Kaufmann et al., (2011), it is a composite indicator obtained by the combination of five dimensions of institutional quality: voice and accountability, government effectiveness, regulatory quality, rule of law, and corruption (for more details on IQI, refer to Nifo and Vecchione’s paper (2014)). Table 1 shows summary statistics for these variables.

Table 1. Descriptive statistics for the explanatory variables and SWCR

	SICILY				SARDINIA			
	Min	Max	Mean	Standard Deviation	Min	Max	Mean	Standard Deviation
<i>SWCR</i>	0.001	62.002	14.215	12.552	3.465	94.633	57.739	10.371
<i>GEOGRAPHIC/DEMOGRAPHIC</i>								
OVERALL SURFACE	1.168	554.992	66.236	80.249	2.474	547.041	63.925	61.821
ELEVATION AB. SEA	1	1,275	391.387	276.803	2	1,000	297.707	231.570
POPULATION DENSITY	3.34	5,214.98	331.672	625.585	4.32	3,178.62	76.054	204.468
METROPOLITAN AREA	0	1	0.635	0.481	0	1	0.045	0.207
<i>SOCIO-ECONOMIC</i>								
EDUCATION RATE	35.47	88.06	64.317	8.305	33.33	84.78	57.246	8.042
UNEMPLOYMENT RATE	7.21	31.32	19.605	4.888	6.06	40	18.837	4.909
COUPLES WITH CHILDREN	0.448	0.755	0.647	0.0499	0.371	0.875	0.686	0.056
VALUE ADDED PER CAP	13,301.9	18,158.4	15,366.32	1,221.005	12,493.6	21,458.1	14,845.6	6,257.9
<i>INSTITUTIONAL QUALITY</i>								
IQI	0.086	0.328	0.225	0.052	0.392	0.627	0.497	0.093

Source: Authors' calculations based on ISTAT data.

5. Results

In this section, we comment the main empirical results of our analyses. We use the log-log model, in which the coefficients represent the percentage change in the outcome variable (SWCR) for a percentage change in the given covariate (elasticity of the dependent variable with respect to the covariates). Table 2 shows the coefficients of the regressions.

Table 2. SAR coefficients on log-SWCR, Sicily and Sardinia

	Sicily	Sardinia
<i>GEOGRAPHIC/DEMOGRAPHIC</i>		
OVERALL SURFACE	-0.482***	-0.106
ELEVATION AB. SEA	-0.030	0.0005
POPULATION DENSITY	-0.461**	-0.129
METROPOLITAN AREA	0.276	-0.041
<i>SOCIO-ECONOMIC</i>		
EDUCATION RATE	0.107*	0.956**
UNEMPLOYMENT RATE	0.095**	0.461***
COUPLES WITH CHILDREN	0.227	0.454**
VALUE ADDED	0.021**	0.972***
<i>INSTITUTIONAL QUALITY</i>		
IQI	0.269***	1.002***
<i>SPATIAL EFFECT</i>		
SWC RATE Spatial Lag	0.191***	0.658***
Constant	7.226	3.758***

Source: Authors' calculations based on ISTAT data.

Sardinia performs better than Sicily in terms of SWCR (see Table 1). This advantage is due to the combination of different factors. The lower *population density* of Sardinia (Table 1) favours the region because in highly populous areas it is more difficult to implement a suitable and sustainable waste management system and takes efficient measures for the separate waste collection and waste prevention (Passarini et al., 2011). In fact, densely populated municipalities may have service inefficiencies due to limited spaces for storing waste and more difficulties in implementing adequate strategies for separate collection (Simões et al., 2012). In the same way, the size of the municipalities, measured by the *overall surface area* variable, influences the separate collection operations because collection is more difficult over large areas. In fact, the large area often affects the transport and traffic conditions (Hage and Söderholm, 2008), increasing the time required for the waste management companies (or the citizens) to reach the disposal sites or recycling centres.

The waste management performances are also influenced by the people's opportunity costs of time. We control this factor through the *unemployment rate* variable because the individuals who are active in the labour market have higher time constraints respect to inactive ones. The results show that the unemployed of Sardinia care about the environmental issue by spending their time in separate collection activities. Thus, the local governments of Sicily could stimulate the participation of their citizens through the adoption of policies that aim to decrease (or reward) the associated opportunity cost of time (Duggal et al., 1991). In this regard, the adoption of economic incentives for collection activities or taxes on the amount of municipal waste produced/landfilled can lead to higher SWCRs (Reschovsky and Stone, 1994; Bohm et al., 2010). The economic wealth of a region, measured by the *value added per capita*, is one of the main determinants of the waste management performances (Shekdar, 2009; Garofalo et al., 2018; Musella et al., 2018). In fact, the waste management system requires economic resources in order to finance advanced separate collection techniques that, in turn, can reduce individuals' opportunity costs of time. For example, the waste generated can be collected by fixed stations (the citizens are obligated to deposit their waste in the site decided by the local governments) or by the most expensive door-to-door system (home collection system). Intuitively, the door-to-door system reduces individuals' opportunity costs of time increasing the SWCR of municipalities but it requires significant economic resources of the local governments.

Historically, the *quality of institutions* in Sicily is rather low making the region vulnerable to the proliferation of crime organisations. By colluding with local institutions to control the waste market, crime organisations strongly affect waste management performance, making it harder to achieve high levels of SWCR (D'Amato et al. 2015). Attracted by the higher profits of landfills compared to those guaranteed by separate waste collection (D'Amato et al., 2015; Massari, 2004), the aim of these organisations is to manage both legal and illegal landfills (e.g., by buying under-priced land and thus promoting the use of landfills).

The spatial component has a predominant role in explaining the higher levels of SWCR in Sardinia. By considering the *lagged SWCR* as an indicator of the citizens' PEBs, the results of our analyses show the greater sensibility of the Sardinian population towards environmental issues (as also confirmed by *couples with children* variable). Thus, waste collecting habits tend to be strongly influenced by the neighbourhood effect (e.g., social pressures from the relational environment, family and friends) in either positive or negative ways (Crociata et al., 2015). The negative proximity effect (being under the influence of bad environmental behaviours) is found in Sicily, whose municipalities present weak pro-environmental orientations, as shown in Figure 1. Consequently, this negative contagion effect does not stimulate the peoples' inner satisfaction (the psychological state that underlies PEBs) that could be the driving force towards individuals' greater awareness in protecting the environment (Kaida and Kaida, 2016). Conversely, the inhabitants of Sardinia show greater sensibility towards environmental issues

because of the belief that their example could generate pro-environmental orientations in their neighbours and thereby leads to collective benefits (Agovino et al., 2017).

6. Concluding remarks

In this paper, we compared two Italian regions, Sicily and Sardinia, to understand the main forces underlying the waste management performances. Although other studies have analysed the impact of the morphological characteristics, socio-economic context, institutional quality or pro-environmental attitudes on the separate waste collection, there is little consideration on joint action of these factors using municipal-level data. Our results highlight how the better performances of Sardinia respect to Sicily are mainly attributable to the joint action of the local governments and citizens. In this light, Sicily can look to Sardinia as a good example to look up to.

Part of the success of Sardinia derives from the introduction in 2008 of a regional waste management plan, based on the guidelines of the EU Directive No 2008/98/Ce, which aims to reduce the amount of waste by improving the separate waste collection and by reducing the use of landfills. In fact, with the Resolution No 15/32 of 30/3/2004, Sardinia adopted a system of penalties/rewards that provides tariff discounts to municipalities that reach predefined separate collection thresholds and penalises the less virtuous municipalities (i.e., municipalities that use excessively the landfills). The effectiveness of this instrument is demonstrated by the growing number of municipalities receiving awards and by increasing regional SWCRs. A central role is also played by the operational collection activities. In Sardinia, home collection methods, such as door-to-door system, are predominant with a minority of municipalities that use mixed techniques (mixed use of door-to-door collection and garbage cans) or just road collection. The use of modern and time-saving methods allow Sardinian citizens to minimise the efforts required to differentiate. Moreover, Sardinian municipalities have formed several consortia to supervise the collection activities and reduce the associated costs.

Our results show that the external pressure/extrinsic motivations lead to virtuous results in SWCR if they are accompanied by intrinsic motivations. In fact, the separate waste operations have a cost for every citizen (time and efforts), but the benefits, both economic and environmental, involve the whole community. Therefore, institutions should explain to citizens why collective actions are necessary through information campaigns that aim to promote the environmental issues related to waste management. Our findings also suggest that policies should focus on the socio-cultural dimensions of environmental behaviours – and not only on technical monitoring of waste collection processes – through initiatives that involve all components of society, irrespectively of age, income or education level. In this way, through the separate waste collection, people could feel part of a virtuous social cycle that produces various kinds of benefits and personal approval within their community. If such perception is adequately reinforced by the social environment, it becomes self-fulfilling and generates large collective benefits.

In brief, virtuous performances can be reached when each actor plays his part. While in Sardinia a collaborative climate has been established between institutions and citizens, in Sicily, the poor SWCRs are caused by a lower institutional quality and by indifference of the population towards environmental issues. In other words, the waste management process might be optimised through a stronger collaboration between citizens and local government, which must jointly adopt appropriate behaviours.

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VALERIA COCCO¹ AND MARCO BROGNA²

MEGA EVENTS: A CRITICAL POINT OF VIEW

Abstract

The paper aims to focus on the debate about mega event, and in particular on the effects that an important “media event” is able to generate on the territory and on its tourism attractiveness. On the one hand, mega events can be considered as a strong tourist attraction, and as powerful opportunities to improve the image of the city and to attract national and international visitors (Mihalik and Simoneita, 1998); on the other hand, they can represent a real barrier to development, “contributing to the naturalization of social inequalities” (Horne, 2007). In the current socio-political context, the question concerning benefits of a mega event in the host city is widely discussed. In the last two decades, there was a “race for bidding”, but currently, the great number of protests and debts influenced the Olympic territories, discouraging the frenetic rush to the Games. In the literature, the question is controversial, and the experts doubt about strategies and policies applied by events’ stakeholders, not often meeting the concrete opportunities for territories and the needs of communities.

Keywords: Mega events, policies, legacy, tourism

JEL Codes: Z29

1. Introduction

This paper offers an analysis of mega events and, in particular, of the Olympic Games, that are considered one of the most celebrated sport mega events of modern times and characterized by a strong global media impact on host territories (Cocco, 2017).

Hosting a mega event such as the Olympic Games could be a challenge for the redevelopment of the host city and surrounding territories. In fact, according to Müller (2017), the Olympics are able to act as a catalyst for urban development, as a potent vehicle for post-industrial adjustment (Broudehoux and Sanchez, 2016). In fact, according to some authors (Essex, Chalkley, 1998; Mihalik and Simoneita, 1998; Guala, 2006; Celant et al., 2014), mega events are an opportunity for the restyling, renewal and regeneration of the host cities, or rather, a development tool for the territory and for the creation of a territorial brand, as well as a strong tourism attractor that thanks to adequate governance and appropriate strategies can generate large benefits, i.e. the use of culture and sport to revive already existing structures and depressed areas (Broudehoux and Sanchez, 2016), or even to renew the city’s image, with a particular emphasis on urban marketing and environmental strategies.

On many occasions, staging a mega event is a way of restating the priorities of urban actions and policies (Broudehoux and Sanchez, 2016). In this way, mega events as exceptional happenings are powerful engines for promoting market-oriented policies (Clark et al., 2016) and local economic growth (Dansero and Mela, 2007).

Since the “model events” of Los Angeles 1984 and Barcelona 1992 Olympics, there has been a clear increase in the number of cities bidding to host the Olympics, perceived by local leaders as an opportunity to improve national and regional economies, in the short run, offering social-economic benefits to the surrounding territories (Malfas et al., 2004). Furthermore, a discussion of the history of

¹ La Sapienza University, Italy, valeria.cocco@uniroma1.it.

² La Sapienza University, Italy.

the Olympic Games reveals that only a few cases of “legacy benefits” have occurred in the last 30 years. In effect, in the last two decades, staging a mega event has not been a good choice for cities, as in most cases they have come out defeated and indebted because of the huge expenses linked to overestimated forecasts of a mega event ‘legacy benefits’ (Clark et al., 2016, p.87). For this reason, the legacy of the mega event on the territory that was often called heritage, emphasizing the positive meaning of the term; nowadays, it is defined more generally legacy, without necessarily placing a positive accent on the term, because they have not always been favorable the territorial changes achieved during the Games (Brognia, Cocco, 2017).

In this context, it is evident a double effect that a mega event can generate in terms of opportunities or damages on a territory.

So, the aim of the paper is to investigate the concepts of ‘Regeneration Games’ (Cochrane and Peck, 1996, p.1319), “urbanalisation” and “boosterism” (Hiller, 2000, p.440) and the wide debate on mega events, related to the debate between growth and development, bottom up and top down policies, elites and minorities needs.

In addition, through an analysis of the key ideas of experts, this paper also traces the changes in the strand of the literature in the last few decades, in terms of a change of perspective as evolution, or consequence due to the damage done to many cities “spoiled” by mega events. In fact, many experts have made critical evaluations of the impact of mega events on host cities and regions. They are skeptical on the actual benefits, cause of the too many broken promises and the combination of overpromising benefits and underestimated costs, that emphasized the so-called “mega- event syndrome” (Müller, 2017, pp.6-15).

Thus, focusing on the legacy effect, it is evident the socio-economic impacts generated by mega events in urban transformation, in particular the social, cultural and economic effects are able to modify the quality of life.

An analysis of the different literature, of divergent perspectives, allows a critical discussion of the urban transformation of host city and about policies and strategies applied by elites and stakeholders during the mega events.

The last goal of the research, therefore, is to investigate the reasons for this change in the experts thought, and to find out whether this change of interest in the literature could reflect the end of an era of mega event as an instrument of regeneration and competitiveness of the territories host.

2. A changing literature

Mega events’ literature is vast and varied. Mega events’ study fits into many different fields, so experts’ study has many different points of view.

The Olympic Games are considered the most important and significant sport events of the modern era, and they are defined as mega events because of the strong global impact that characterizes them.

The literature highlights a profound thought change over time, so that it is possible to identify two clear literary strands, often contrasting.

Experts' interest seems to shift from the socio-economic to the sociological context, leading experts to increasingly focus their attention on issues such as the right of minorities and social justice and equity.

The contrasting issues of the two main strands of literature are also confirmed by the current socio-political context of the Olympic territories. There is a radical passage from neoliberal thinking that enhances the mega event as an instrument of regeneration of territories, to a heterodox literature, capable of investigating themes such as the relationship between mega events and local communities, between elites and minorities.

From the analysis of the literature and the socio-political context, it is natural to wonder the meaning and causes of change, and if the mega event can still be able to bring added value to the territory, or if it never has been able to make it.

Such a radical change in literature can be read as an evolution by experts, who begin to shift the focus of their attention from the only factors and determinants of economic and environmental impact (i.e. regeneration of the territory, etc.), to take into account social equity and the right to the city (Harvey, 2014).

Therefore, literature changes its approach, increasingly focuses on sociological themes. It is a new interpretation that studies the phenomenon no longer quantitatively, but qualitatively.

Due to a reading of reality from a less orthodox or less neoliberal perspective, supported by the last two decades' Olympic failures that occurred from Atlanta 1996 to Rio de Janeiro 2016 Summer Olympics, literature is now shifting its focus on issues of big relevance (i.e. social justice), providing a significant contribution to the new vision of the event in the socio-political sphere.

In fact, the different fragments of question of this "new" literature find "common ground" in the critical approach to Orthodox literature, which paid too little attention to issues related to the quality of life of local communities and minorities.

The "new" literature defines itself as critical, in considering the mega event as an opportunity for regeneration, competitiveness, creation of urban marketing, and it condemns the neoliberal spirit assumed by contemporary globalization, which is shown here in the form of a mega event itself.

Therefore, analyzing the different literature, in both divergent perspectives, it is possible to suggest a critical discussion on the transformation of the vision of the instrument of the mega event, related to a new awareness of cities and communities that aim to brake the rush to the Games.

2.1. From hallmark event to mega event

The literature is interested in socio-economic terms to the issue of mega Olympic events since the '70s, when the Olympics were defined hallmark events (Ritchie, 1974).

For about fifteen years the Olympic event is considered a quality event - *hallmark event*- and only in a few cases appear other terminologies, such as *landmark event* (Hiller, 1990), and *special event* (Getz, 1989).

Since the early 90s, a new terminology has been affirmed in the literature to indicate the great events and better identify the importance of the Olympic event, so it is introduced the concept of *mega event*. Already in 1987 Ritchie, and a few other authors (Socher and Tschurtschenthaler, 1987; Kurtzman, 1987) introduced the new term with reference to the big events attractors of tourism.

With the new millennium, the term mega event seems to increasingly take hold in the literature related

to the Olympics, marginalizing the now obsolete terminologies - hallmark events, special events - in reference to events of lesser importance, although, still "some authors use indifferently mega or big events, or still special or hallmark events" (Guala, 2015).

Maurice Roche (2000) identifies four categories of events: mega events, special events, hallmark events, community events, based on a re-elaboration of the classification previously carried out by Hall in 1989 (Guala, 2015).

In the works of a few years prior to the ones of Roche (2000), realized by Ritchie (1984), Hall (1999), Chalkley and Essex (1999), the term "hallmark event" is defined as the type of event able to obtain recognition, attention and interest at international level, in other words, an event worthy of a "quality label".

Hiller (2000), Hall (1992) and Getz (1997) define special events as "short-lived and high-profile" events (Hiller, 2000), whose organization has considerable territorial effects with a particular economic, social, cultural and political value (Hiller, 2000) and characterized by a massive involvement of users from different territories.

The community event, having a regional or local scope, is therefore excluded from the discussion regarding the use of this term in relation to the literature of Olympic interest and relative to large-scale events.

In 1987 Ritchie defined the "mega event" as an important, recurring or only once organized event, of short duration, which serves to increase the awareness, the charm, the economy of a short and / or long-term tourist destination. The prefix "mega" refers, therefore, to an out-of-the-ordinary and large-scale event (Salazar, 2016, Brogna, Cocco, 2017). The success of these events depends on their uniqueness, importance or ability to create interest and attractiveness (Ritchie, 1987). This definition fits perfectly with the mega sport event, named Olympic Games.

3. Mega event as media event

The mega event is a complex phenomenon: it is characterized by a temporary duration, but it is able to involve significant changes in the urban fabric of the host territory and in the daily life of the community. First of all, it is necessary to define the mega event according to its characteristics such as duration and scale, depending on the abundance of participants and spectators, (Celant et al., 2014, p.81), which may also include online/TV broadcasts.

A mega event can have an exceptional character, it is unrepeatable or repeatable only after many years (e.g. the Olympics, Jubilee, Expo), or it can have a more ordinary character thanks to regular and planned intervals (Celant et al., 2014).

Mega events are different according to size, scope and reach, geographical location and appeal (Salazar, 2016), and the ones with a major effect in economic and business terms are characterized by frequent periodic trends, a stable schedule and a worldwide reach (Cocco, 2017; Celant et al., 2014).

According to Müller (2017) there are four integral dimensions to be considered in the study of mega events: visitor attractiveness, mediated reach, costs and transformative impacts (Cocco, 2017).

In fact, although the Olympic Games are temporary mega events, just two weeks' duration, they are able to attract millions of people from all over the world, thanks to their international media coverage

(Kassens-Noor, 2016). For this reason, the Olympics, in the literature of the last twenty years, are defined mega events to affirm the relevance of interest at the global level, so the impact of global media on the host territories.

In essence, the city hosting the Games is transformed into a huge stage, obtaining a double possibility from such overexposure. Thanks to the worldwide scale, the mega event is often considered as a “media” event and it is able to experience as an opportunity for urban redevelopment and a push towards the modernization of the territory. The media involvement of a mega event can be distinguished between direct and indirect audiences – i.e. participants and spectators on the set or on the audiovisual streaming - (Celant et al., 2014: 81) and it is able to increase the notoriety and the visibility of the Olympic territory. Moreover, the strong impact of global media can have a double effect, precisely because of the excessive exposure of the host city during the period of the event. On the one hand, in fact, the mega event can act as a trigger to urban regeneration, offering the city the opportunity to gain notoriety and visibility at a global level (Brognia, Cocco, 2017); on the other hand, instead, as Zimbalist points out, this overexposure of the territory hosting the event can be a great asset to be managed, which can bring degenerative consequences to the territory in terms of image.

The role of the media can raise awareness of the host city. If, therefore, the territory conquers notoriety and interest through media spaces at a global level, it is thanks to the success of the event, but being at the center of the scene also entails considerable risks. At the same time cities, like celebrities, expect a certain respect also after the event, but their memory is likely to fade over time (Malfas et al., 2004, p.213). These features affect the tourism attractiveness and the territorial appeal (Roche, 2000), on the host city (Malfas et al., 2004). In fact, the implications of these events go far beyond the sport field (Guala, 2006), highlighting in this sense a transition from a sporting event to an urban event (Cocco, 2017).

4. The event and the city

Sports and events have always had a spatial and geographical dimension (Golubchikov, 2017: 253). In fact, the Olympics are closely linked to the figure of urban designers, engineers and architects, who become the actors in the organization of the event and are active in the transformation of the city (Malfas et al., 2004). So, analyzing the question from the Keynesian point of view, a great event offers the opportunity of a large-scale urban improvement (Malfas et al., 2004: 212) and it is often aimed at realizing a real mega- project (Golubchikov, 2017: 245).

The event marks the uniqueness of a certain place (Roche, 2000), thus, the challenge for the host territory in the performing time of the mega event must not only be to attract people and capital, but it is well more complex.

Events of global scale, such as the Olympics, are able to stimulate and accelerate the implementation of existing urban development plans (Kassens-Noor, 2016: 41-54), - as happened, for example, in the case of the Barcelona Olympics in 1992 -, or they can trigger a political strategy to relaunch abandoned urban areas (Kassens-Noor, 2016: 41-54), as in the case of the Sydney Olympics.

Observing the Olympics, under a neoliberal view, Golubchikov says that mega events are considered an opportunity to promote territories thanks to strategic plans (Golubchikov, 2017: 237-255). Graham and Marvin (1995: 169-189) believe that the vision of a mega event as an opportunity for urban regeneration is strongly associated with "post-Fordism". Mega events, in fact, are often considered as an opportunity for restyling, renewal and regeneration of the host cities, due to considerable capital expenditure and investments on venues and infrastructures in host territories.

Highlighted the link between territory and event, it is interesting to understand why the cities are pushed to host the mega Olympic events.

Matheson and Baade underline the link between the notoriety of the territory and the event, therefore the mega event "marks the city on the map", which can be a first reason to bid for Games, which can be better recognized in urban and citizens' pride. Not only. Cities want to bid the game to regenerate the urban fabric, renew abandoned areas and create a global brand of the territory. In short, their goal is to take advantage of the opportunity offered by the event to improve the urban fabric and increase visibility, notoriety and tourism attractiveness. Cities decide to stage an event of this magnitude of benefits, because they are blinded by the over-expected economic benefits and by the possibility and opportunity for urban regeneration.

The Olympics, as an exceptional event, has a temporary nature and a fixed date, so it is important to respect the deadlines and the constraints imposed for the realization of the event. The time constraint, on the one hand, may be able to help speed up the process of change and renewal of the city, i.e. construction of sports buildings, infrastructures, etc. in a short time (Hiller, 2000: 440). On the other hand, the deadline can generate distortive effects, with negative impacts on the territory. According to Müller (2017: 6-15), it is urban development that becomes an instrument for the event, not the reverse. From the sporting event to the urban event, the Olympics become an opportunity for a great urban transformation (Müller, 2015: 6-15), to the point that experts like Cochrane and Peck (1996: 1319-1336) define the Olympics as "Regeneration Games" (Malfas et al., 2004: 216), to underline the strong link between territory and event, symbolizing the basement of the transformation of the urban landscape of the host city. There are several factors that influence the rebirth and regeneration of the territory. For this reason, stakeholders have to choose the right strategy to adopt for the host region.

The mega event, changing the urban fabric, is also modifying the image of the territory and consequently the quality of life of the residents. In this context, governance plays an important role in urban regeneration. Considering, for example, the urban policies of the Sydney Olympics, at first glance, they appear virtuous ones. In fact, the Olympic Park, realized through the reclamation and recovery of an abandoned industrial area reserved for the containment of toxic waste, was destined to become the most important sports and recreational center in Sydney, with the greenest Olympic Village in the Olympic history. Instead, less than a year after the end of the Games, the huge Olympic installations of the park were abandoned, leaving as a legacy, in addition to the red budget, the so-called "white elephants" - Furrer (2002: 13) introduces the concept of "white elephants" as places and structures of excessive size that have been planned on the basis of Olympic crowds -. The territory acquiring great visibility at the world level during the event, needs an intelligent direction (Celata, 2016) to give life to a tourist imaginary and allow the territory itself to increase its competitive performance compared to other territories.

Although the classical literature does not doubt the catalytic drive of the Olympic event on the territory, the often more frequent case of "white elephants" (Furrer, 2002), raised up in recent decades, highlights the waste of resources and money effect of the Olympics and also the decay of the affected areas.

The heterodox literature reflects on the idea of "Olympic Barrier". In a first spot, it can sound as an oxymoron. In fact, sports are often thought as the element able to break down social and cultural barriers and to overcome limits. Yet, the Olympics, being a global event, is such as to contribute to the "naturalization of social inequalities" (Horne, 2007), to widen the social gaps between the city elites and that part of the poorest population. In fact, Roche (2000) defines the Olympic event as a bridge to whose margins are found, on the one hand elites and stakeholders who are the real beneficiaries of the event, on the other the population and minorities.

From an economic point of view, the Olympics can become a barrier to the growth and development of the territory, when investments in infrastructure represent a waste of money that leaves negative legacies to the territory. The Olympic legacy, in fact, can have degenerative impacts on the territory, which inevitably go to invest the tourism sector. According to the critical strand of literature, it is not enough to carry out an event, albeit with a global scope and character such as the Olympics, to generate tourist development on a given territory, because there is missing the allometric process through which to create a breaking point in the territory necessary to promote development (Celant, 2014). Moreover, in terms of tourism, a world event, tends to create more economic and social costs (i.e. the problems of temporary overcrowding of areas dedicated to the construction of new buildings or the Olympic Parks) rather than benefits, mostly considering a territory that already enjoys a strong notoriety and appeal in terms of tourism.

4.1. Build or preserve? The case of white elephants

Even if the main literature about mega sport events emphasizes the ‘legacy benefits’ offered by the Olympics to the host city in terms of new facilities and infrastructure, urban revival, notoriety, the city’s image and tourism appeal, major public welfare, additional employment and local business opportunities (Kasimati, 2003), negative impacts and the more and more frequent “white elephants”, - i.e. Olympic Villages - symbolizing the waste of money and decay of certain areas, have often proved the result of the Olympics games especially in the last 20 years (Flyvbjerg and Stewart, 2016).

Recent literature has also discussed the high construction costs of public sports infrastructure and venues, temporary crowding problems, the loss of visitors, property rental increases and temporary increases in employment and business activities, (Kasimati, 2003), as well as the “burning money effect”, social justice and poverty problems, e.g. Rio de Janeiro, 2016 (Costa, 2012; Venturini, 2014), and also abandoned Olympic areas and over-sized, underutilized sport facilities referred to as “white elephants”. Furrer (2002, p.1), ex-project manager of the International Olympic Committee (ICO), defined the concept of ‘white elephants’ as “over-sized venues and facilities that were planned with Olympic-size crowds and ticket sales in mind”. In fact, enormous urban venues such as Olympic parks, stadiums, or even hotels are designed into the urban fabric of host cities just for the two weeks’ mega event duration, and not for the post-event. As a result, the new buildings do not fit into a long-term urban planning policy. The new facilities neither respond to the local population’s needs in terms of leisure and cultural facilities, i.e. colossal hotels after the staging of the Games are oversupplied bringing negative effects on the host city or region’s hotel industry (Furrer, 2002), or they even become abandoned places, degrading the urban fabric of the Olympic area.

The Sydney Olympics 2000 is an interesting example in terms of white elephants and the recovery of abandoned areas. In fact, Sydney was credited with paying special attention to the environmental impact of mega events, and that is why the Sydney Olympics are defined as the “Green Games”. Despite the fact that the Sydney Olympic Park was built on a decontaminated and recovered industrial area, that was previously disused and designated to containing toxic waste, it became the most important sports and recreation center in Sydney with the greenest Olympic Village of all history. Nevertheless, nowadays, it represents a huge failure. Just a few months after the end of the Games, the massive Olympic facilities of the park were abandoned, leaving a “white elephant’s legacy” and the so-called ‘Sydney Jurassic Park’, so that the host city suffered a significant territorial and economic defeat (Furrer, 2002; Brogna and Cocco, forthcoming). In truth, new stadiums, new village accommodations and adapted transport systems draw attention to specific geographies because of their transformative, the environment and population effects across a city (Clark et al., 2016).

In other words, the Olympic Games change the city, not only during the duration of the event, but also in the so called "Olympic tails" – i.e. legacy of the event -.

Oversized venues became a white elephant problem, when they do not fit into the reuse strategies. There is a very fragile relationship between mega events and urban regeneration. In fact, the accomplishment of urban transformation and the construction of new facilities (i.e., a stadium, an Olympic Village, etc.) has to match the expected event capacity, but it is necessary to think, even before the creation of new venues, of the post-event reuse and the needs of the local people, so as to find a balance between the event and post-event capacity.

Thinking about the post-event during the implementation of urban planning policy would have given the opportunity for new buildings to be re-used in the long run after the end of the mega event. It is therefore necessary to rethink the cities in dynamic terms, paying particular attention to the socio-economic, territorial and environmental processes, which have always given rise to the evolution of the territories and which, if desired, can be positively influenced by the presence of mega events.

The reuse of sports facilities, built for the Olympics, is nowadays the real challenge the host city has to overcome in terms of territory development (Brognia and Cocco, 2017).

In a recent paper about the modern concept of urban regeneration and new approaches to the transformation of cities, Cangelli (2015, p.59) defines three basic concepts, "cities as common good, territory with a strong structure, and light architecture". Analyzing the concept of territory as a scarce resource, the new regeneration approaches are moving beyond traditional urban restoration and large-scale plans towards the idea of non-invasive initiatives (Cangelli, 2015), so that planning moves in the direction of recovery, preservation, reuse and the recycle of already existing structures, in this way reducing the construction of new buildings and consequently saving public money.

The idea of 'urban regeneration games' has to be balanced between the ancient and modern, the building of new venues and the preservation of already existing ones (Cangelli, 2015, p.66). Light architecture represents the modest intervention of the new venues accomplishment in urban fabric; thus, there is a need for urban planners, engineers, architects, and moreover, politicians and event stakeholders to fully understand the context, the social dynamics and citizens' needs.

A vivid debate still subsists about the issue 'build or preserve?' Local leaders and event stakeholders are generally inclined towards the creation of new structures as symbols of the city and an event's success, or even as an Olympic milestone (Furrer, 2002). Nevertheless, the last two decades has highlighted more failures than successes in the Olympic history. Indeed, in the last decade, the ICO raised the issue of permanent structures, proposing a reduction in the waste of resources, with the realization of temporary installations and removable works (Furrer, 2002). Using temporary structures is convenient for many reasons: first of all, it is a way of avoiding possible white elephants in the host city, with the consequent benefits of cost reductions, and a restricted environmental impact. Temporary venues also guarantee greater flexibility in the event planning phase and are a minor inconvenience to the local population due to lower construction time (Bozzato, 2012).

According to Müller (2017, p.14), "building temporary facilities such as sports venues can both be cheaper than building permanent facilities and eliminate maintenance costs after the event for facilities that are hardly used or would otherwise be too large. [...] There is, however, a drawback to temporary structures: they increase event-specific expenditure that is unproductive for urban development, so hosts must weigh the costs and benefits in each case".

Indeed, the positive legacy and local benefits promised by host cities, create public enthusiasm and support for the staging of the event. However, even though, large public expenditures seem to be justified by optimistic predictions, some experts are skeptical about the actual net economic benefits of hosting mega events (Zimbalist, 2010), as mentioned above, most of the new infrastructures built for the Games, typically become white elephants, generating, thus, the creation of a hybrid peri-urban area, and enlarging the unsolved question of the preservation of existing buildings and the debate about the legacy of events that nowadays is still open.

4.2. Reuse, reduce, recycle. The case of the Olympic village

In this regard, it is interesting to briefly open a parenthesis on the issue of the Olympic Village and its evolution over the years. “The origins of the idea of Olympic Village can be found in the thought of the same inventor of modern Olympics, Pierre de Coubertin” (Bortolotti, 2009, p.1).

Over the decades, there has been an evolution in the concept and idea of the Olympic Village. At the beginning of the modern Olympics, not so many athletes were involved in the competition, therefore there was less interest in building accommodation to host them. As the modern Olympics started to take hold, the need to create temporary accommodation for athletes during the Olympic Games led to the construction of a proper village, a miniature city (Bortolotti, 2009). From prefabricated structures to permanent structures, the Olympic Village became an integral part of the urban fabric; and the event started to move from a simple sports event to an urban event, able to regenerate the urban fabric and the redevelopment of peripheral areas, mainly thanks to the creation of new sites, or also, the transformation of already existing spaces. The Olympic Village became the ambitious building of new urban areas (Broudehoux and Sanchez, 2016). However, the past reveals more cases of Olympic Villages considered symbols of failure, rather than symbols of “Regeneration Games” (Cochrane and Peck, 1996, p.1319).

An interesting case study, is the Roman Olympic Village built in the late 1960s. On the occasion of the XVII Olympiad hosted in Rome an Olympic Village was created not far from the sports games center (Foro Italico). In actual fact, it was built in an area of the city consisting of shacks and abandoned land known as “Campo Parioli” (Salvo, 2014, p.139). The Olympic Village, as permanent accommodation, was an opportunity, offered by the Games, to socially ‘reclaim’ the area which was also very close to the historic center and, even more, to the wealthy suburbs (i.e. Parioli district) of the city of Rome (Salvo, 2014).

From an architectural point of view, the Olympic Village houses represented a huge innovation, inspired by Le Corbusier and “upgraded to the North European experiences, characterized by an unusual opening and permeability to the city historical and its natural surroundings” (Salvo, 2014, p. 139). The new Village emphasizes “home for all”, symbolizing ‘a different processing of the public housing complex type’ with respect to the Roman suburbs planned to house families displaced from demolished neighborhoods called “borgata” (Salvo, 2014). In the 1970s, just 10 years after the Games, the Village started its degradation process which ended thanks to the construction of the new auditorium in Rome, leading to an unexpected re- evaluation of the Olympic Village.

5. The élites and the event

Élites had a wide influence on Games’ planning and they are able to deviate event benefits towards their own interests at the expense of the disadvantaged segments of the population, creating segregation of minorities, inequality and social conflict (Oliveira et al., 2007, Veiner, 2009, Broudeoux, Sanchez, 2016). Mega events are strictly involved in the relationship between territory and élite; in fact, according to Roche, events could be represented as bridges able to link elites and people (Booth 2002). Mega

events are defined as an “integral component of 20th century urban development” (Muñoz, 2006; Clark et al., 2016), and also as “one of the most fundamentally political acts of the modern age” (Horne, Whannel, 2012) which, necessarily, advantages the few - elites - and disadvantages the more - people - (Clark et al., 2016). The strong influence of elites, that are able to convey any event benefits to their own interests, does not guarantee that elites’ presence delivers success of mega events (Roche, 2000, Booth 2002).

Therefore, looking at the issue from an economic point of view, a host city can spend a huge part of the public budget on building new infrastructures for the private interests of local élites.

Powerful elite groups, as entrepreneurs and politicians, head urban mega events; hence, local citizens’ influence is likely quite marginal (Roche, 2000, Booth 2002). If urban elites abuse their power in planning and organisation of the mega event, the gap between elites and disadvantaged people sharpens. According to many experts, there is no doubt that mega event has a determinant role regard to the issues of poverty and social exclusion (Malfas et al., 2004). Well, there is a wide discussion about it, particularly according the aspiration to social justice, as essential premise to obtain autonomy and social transformation (Marx and Engels, 1991; Freire, 2011, Clark et al., 2016).

Mega events can act as tools of social justice (Hiller, 2000), as response to poverty alleviation (Pillay, Bass, 2008), or in an opposite way, increasing social inequality. For example, considering the opportunity of building social houses through Olympic Village, and new infrastructure as facility and service improvements for disadvantaged people – i.e. Cape Town 2004 Olympics – (Hiller, 2000), mega event acts as catalyst and accelerator to the process of urban transformation, thanks to the fixed deadline’s bond (Hiller, 2000). However, there are many cases of negative political impacts of Olympic games, regarding housing relocations, rising rents and real estate prices (Roche, 2000), going to increase the gap between elites and people, in other words, social inequality increasing problems.

A recent case of social protest and inequality problems enlarged by staging mega events is the question of social conflicts of Rio de Janeiro, that in 2 years hosted the biggest sport events FIFA World Cup 2014 and Olympics 2016, and that was considered by Broudehoux and Sánchez as a “double whammy”. In fact, bidding to the World Cup and Olympic Games represented for Brazilian economy a negative factor: costs were escalating and the country was living an economic crisis, accompanied by “negative growth and a lack of funds to cover costs” (Flyvbjerg, 2016) with a difficult opportunity of readjustment. In light of this, administrations and citizens are starting to become aware of the riskiness of a mega event that is a development barrier, deciding to renounce the bidding to avoid debts and problems of social justice, protests and poverty.

Conclusions

According to a large part of the recent literature on mega events, the ones who benefit most from the Olympics in terms of positive effects are the economic and political elite. Urban leadership groups, entrepreneurs and politicians use their power to deliver the mega event (Clark et al., 2016), creating general consensus through a booster mechanism (Hiller, 2000), due to the fact that the community is instrumental for the success of the event (Clark et al., 2016). According to Pillay and Bass (2008, p. 329) ‘mega events are often used as “spectacles”, to promote urban “boosterism” that wed to a narrow-minded pro-growth vision of the city’. The large debate about mega event fits into the debate between growth and development, in fact, economic growth does not mean being capable of favouring the disadvantaged part of the population and guaranteeing equity. Taking into consideration the growth factor, there is no doubt about the mega events’ capability in creating jobs, considering both those jobs directly associated with the organization of the event itself, and those jobs indirectly associated with the

event, such as the construction industry, tourism and the retail industry. Yet, the issue of job creation is not devoid of problems: many jobs are temporary and there are over expectations, so that again it is the urban elites and entrepreneurs who mainly benefit, contributing to enlarging the inequality gap.

The debate is also open from the socio-economic point of view. Several times, infrastructures and venues built to host the mega event represent extra expenditures which neglect the real needs of the social community. At this point, what must be figured out is what is better for the territories: using public money to build a mega event that can be a local growth tool, but that cannot guarantee a legacy of success and benefits, or using public money to satisfy the primary needs of local communities, in so doing not taking advantage of the accelerator mega event. Creating a virtuous path, able to generate a balanced event, could be considered a utopia, but thanks to a synergistic approach between territories, it could also represent a first step towards curbing “mega events’ symptoms” (Müller, 2017, p.6).

But also, a virtuous governance that is able to reduce the bridge that is separating the elites from the people. A governance that is including bottom up strategies and the activeness of people in the decision of the future of territories, where the network between people and elites represents the only solution.

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ANA MARIA DIVISEVICI¹

THE ROLE OF THE COLONIZATION PROCESS IN THE DEVELOPMENT OF 19TH CENTURY BUKOVINA: A CASE STUDY OF CULTURAL GEOGRAPHY

Abstract

Bukovina (Buchenland in German means the "land of beech trees") is a historic region which has been formed in 1775 due to the detachment of the northern part of Moldavia and the inclusion in the multinational Austrian Habsburg state. The most important changes that have taken place in Bucovina's 144 years of existence were caused by migration and colonization. The 19th-century Bucovina's both ethnic and cultural changes have produced permanent effects that are still visible today. Peculiarities of the colonization process, such as the involvement of a wide variety of ethnic groups and radical changes in the Bukovina economy led to the development of cultural geography typical phenomena. We can mention the following stages: value exchange, domination and subordination, acculturation and assimilation derived from the enrollment in the ethnic competition of 11 entities. Thus, were the Romanians in the north were assimilated by the Ruthenians, while the Slovaks passed through acculturation being assimilated by the Poles and the Germans. The Hungarians were subordinated to the Germans, the Ukrainians in southern Bukovina were subordinated to the Romanians, and the Romanians from the northern part of the country to the Ukrainians. At same time the Jews were subordinated linguistically to the Germans while the Armenians underwent a complex process of acculturation under the domination of the Poles and the Ruthenians. On the other hand the Lipovans and the Hutulians were subordinated according to their territorial position either to the Romanians or to the Ukrainians. In this way the cultural vectors indicate the dispersion and the cultural diffusion.

Keywords: Bukovina, colonization, cultural geography, acculturation, assimilation, ethnic diversity

JEL Codes: N93, R23

Introduction

Through the agency of colonialism as the main factor in the reconversion of cultural landscapes, the north of Moldova emerged in the modern era. The entrance of ethnic groups in Bukovina was facilitated by the Austro-Hungarian administration established after 1775 in the north of part of the Moldova state. The roots of the colonization process from which new specific elements were created and contributed to the structural reconstruction of the landscape typology ensured the diversity and uniqueness of the Bukovina cultural landscapes.

The main socio-cultural contribution of the complex colonization process in the Bukovina area was the acceleration of the cultural dynamics through the exposure of the relatively closed, traditionalist, archaic and conservative Moldovan northern cultural space, towards to a modern and progressive Europe at the dawn of industrialization.

The particularities of Bukovina colonialism are marked by the way in which the emigrants integrated and became Bukovineans. The naturalization of such diverse ethnic groups evolved from their relationship with the Moldovan natives, without the proliferation of major, irreparable side effects such as ethnic exclusivity or xenophobic manifestations that led to deep critical issues in massive social masses in similar situations for other regions of the globe.

¹ "Ștefan cel Mare" University of Suceava, Romania, amdivisevici@yahoo.com.

Methodology

Several analytical techniques specific to cultural geography have been used in this present research. The interdisciplinary character has led to the use of methods such as monographic study, historical and statistics data analysis. Techniques needed to investigate the trajectory of cultural diffusion and methods of spatial observation and interpretation were used, to identify the traces of the presence of 11 ethnic groups. The cartographic representation was made by using data elevation model offered by San Diego Supercomputer Center (University of California, San Diego) and processed in Arc-Gis programme.

Results and discussion

The complicated effects of the colonialism were perceived differently and subjectively by each ethnic group. Due to the colonization process, the total population of Bukovina has increased 10 times. The most relevant demographic indicator was the population density, from 6.8 square kilometres, the increase came up to 61.9 square kilometres in 1890, and in 1910 the population density was 76.46 square kilometres².

The colonization course began after the demarcation of the borders and the establishment of the military administration according to the proposals plan presented by General Spleny, but materialized after the visit of Emperor Joseph II in 1783.

The imperial administration needed a specialized workforce, diversified, non-unitary, easily controllable population productive and able to work to ensure the economic development of the empire, capable of paying the contributions to the Kaiser's Crown.

The initial carefully organized process through negotiations between the administration and the settlers would become so vast as to exceed the monitoring capacity of the Austrian military administration; Both-way migratory flows confused imperial plans, alogene masses were fluctuating, the resources needed and promised for the newcomers were insufficient.

The colonists came from various financial reasons, whether they were refugees, day-labourers, craftsmen, businessmen, landowners interested in property, religious missionaries, wanderers, all tried to create spatial connection and construct a particular place by building a good social relationship.

The Romanians also known as the Moldavians formed an indigenous people, with a continuous existence of more than 2000 years in northern Moldavia. They represented the majority population in the year of 1775 at the time when Bukovina was formed by being separated as the northern part of Moldova.

The Hutuli were the Slavs and they formed a secluded community in the mountain area with uncertain roots that are lost in the darkness of times.

The Germans settled in the Franzthal colony and other villages around Cernauti, in Mariensee, Eisenau, Louisenthal, Karlsberg, Bori, Fürstentahl, Lichtenberg, Schwazthal, Poiana Mikuly, Clit, Buchenhain and other communities around different settlements. In 1850 in Bukovina there were 25.592 Germans registred in total from a population of 371.131 inhabitants³.

²The population of Bukovina in 1910 was of 798.355 inhabitants.

³ K., Czoering (1857)- *Emographie der österreichischen Monarchie, bande I-III*, Wien, Braumüller 1855-1857, p. 80, Austria.

There were 5 major colonies of Hungarians, the first colonies resulting from the negotiations between the imperial administration and the Hungarians were Fogodisten and Istensegits. The Hungarians were moved to region of Voievodina in northern Serbia, in 1941 and then in 1944 in the south of Hungary. The Lipovenians settled in Prisaca, Fântâna Mare, Climăuți, Lipoveni, Mitocul Dragomirnei. In the night from 17 to 18 April 1878 many of them emigrated to Moldavia.

The Polish, The Armenians and the Jews have formed communities in Cernăuți, Suceava and Gura Humorului, Zastavna and Sadagura as well as in other market towns. In 1850 the Polish were estimated to 4008 inhabitants⁴ and founded establishment in Cacica, Soloneț, Poiana Mikuly, Pârtești and at the cities outskirts.

The Slovaks first settled in the town of Huta Veche and Crasna. After that they moved to Tereblecea, after the glass factory in Huta closed and in Humoreni in 1803. In 1820 in Hliboca there was a community of 30 families. After a long negotiation process with the local authorities, they managed to establish colonies at Solonetul Nou, Ples and Poiana Micului and become landowners. Also, the agreement with the administration offered them endorsement tax relief for a period of 6 years. In 1850, there were 1844 Slovaks present in Bukovina.

The Jewish collectivity was one of the most powerful ones. The Jews were present in Bukovina ever since the land was part of the Moldova state. In 1775 the Austrian census recorded 2375 Jews⁵. In 1789 there were 463 Jewish families in Bukovina who lived mostly in cities like Cernăuți, Radauți, Siret, Suceava, Sadagura, Gura Humorului and Zastavna. In 1800 there were 692 families registered⁶.

The military administration took severe measures against the Jewish community, poor Jews being forced to leave Bukovina. The Roma or Gypsies were divided into two groups the nomads and the sedentary. Most were slaves and servants in the houses of the great boyars. In 1783 Slavish Gypsies were declared free. Being a nomadic people it was difficult to assess their number. They usually settled temporarily at the edge of larger settlements and villages.

General Enzenberg as the military governor is the one who restored the course and the direction of colonization after 1778. He stopped the massive flow of Ukrainian immigrants into Bukovina and made a selection of them, supervised the process, even imposed drastic measures of expulsion process of Jewish settlers. He also led negotiations and finalised the operation of establishing new German, Lipovan, Hungarian colonies. At the same time, the uncontrolled process of free colonization through spontaneous immigration was carried out with lower intensities, continuing the penetration of the Ruthenians and the Moldavians, Moldovans and Transylvanian fugitives, who had randomly settled in rural settlements, especially in abandoned homes.

The end of the military period is marked in statistics indicating the presence of 9 ethnic groups and a total population of 135,000⁷. After the end of the military administration, a difficult period followed when Bukovina disappeared as a province, becoming part of Galicia. The dissolution of the western borders of Bukovina generated the massive penetration of Slavic nations or those ethnic groups assimilated by the Slavic element; A complex process of cultural assimilation had been ongoing and the Slavic cultural element became dominant in the north part in the detriment of the Romanian Latinism and many Bukovineans, especially the Romanians. The population exodus was recorded in the most difficult political period of Bukovina, 1814-1817. In northern Bukovina, in the Prut-Nistru region, the

⁴ Idem p.74 and p.80.

⁵ J.Poliek (1893) –*Ortschaftsverzeichnis der Bukowina aus dem Jahre 1775*. In JBLM No.1 Vienna, Austria.

⁶ The Regional Archives of Chernovtsy, Ukraine, Fund No. 1, inv.1.Record 1106.

⁷ C. Ungureanu (2003)–*Bucovina în perioada stăpânirii Austriece (1774- 1918)*, Ed. Civitas, Kishinev, Moldova.

Romanian community was detached from its ancient roots and almost disappeared from the area and fled to Moldova⁸.

The strategy of the Habsburg administration was to position colonies formed in the second period along the main access roads to reduce crime, to protect economic goods traffic and passenger safety.

A particular geographic aspect of the establishment of enclave communities is mentioned by K. Czoering (1861)⁹ in his statistical and ethnographic works. The author points out the formation of an area comprised of the Ruthenian localities in the Romanian dominant structure, along the eastern boundary which ranged from north to south including Mamornița, Lucovita, Tărășeni, Stăneștii de Jos, Poeni, Hliboca, Climăuți, Fântâna Albă, continued to the south with the settlements Slatioara, Gemenea and Ostra. Inside these enclaves there were processes related to cultural diffusion through the penetration of the Romanian elements within the Ukrainian communities.

A less studied phenomenon is that of migration of the wealthier peasants, craftsmen, landholders and small Romanian boyars who have completely separated themselves from the Romanian lands, traveled through the world and emigrated to Canada and the United States, along with the Armenians, the Jews and the Ruthenians.

Besides the particularities of the mentioned colonization process, phenomena typical of cultural geography are evident: value exchange, domination and subordination, acculturation and assimilation, derived from the enrollment in the ethnic competition of 11 entities.

The Romanians in the north were assimilated by the Ruthenians, the Slovaks passed through acculturation, being assimilated by the Poles and the Germans.

The Hungarians were subordinated to the Germans, the Ukrainians in southern Bukovina were subordinated to the Romanians, and the Romanians from the northern part of the country to the Ukrainians. Besides these groups, there were also the Russian, the Turkish and the Tatars with a less prominent features in the cultural landscape.

The Romanians who remained extremely reduced in number in the northern part of Bukovina were culturally drowned by the massive Ruthenian waves that penetrated from the west of Galicia and underwent an extremely rapid acculturation as historian N. Iorga pointed out: "Small country, but rich, as there is no other in differences, in mismatches and enmity, of the earth and of men!"¹⁰ Although massive depopulation should have favoured an accelerated development of colonization, the administration of the imperial "black eagle" failed to replace the emigrated population with an equivalent number of new settlers, the process being much slower. During the Galician period new German and Slovak colonies were formed.

New members of other ethnic groups settled in the existing settlements or at the city or village outskirts. Some Polish and Armenians were assimilated by the Jews, clandered clandestinely in the urban mass, providing various commercial services, crafts, or civil servants, becoming land owners.

⁸ C. Ungureanu (1997)- Evoluția etno-demografică a Bucovinei în anii 1774-1850. PhD –Academia de Stiințe a Republicii Moldova, Institutul de Istorie, p 92.

⁹ K. von Czoering- Statistisches Handbüchlein für die Oesterreichische Monarchie- Wien, 1861 și Ethnographie der österreichischen Monarchie, bande I-III, Wien Braumüller 1855-1857.

¹⁰ N. Iorga (1996)-The Romanian Nation in Bukovina Published by Bukovina- Basarabia Institute, Rădăuți- Bukovina, the historian highlighted the phenomenon of the Romanians' acculturation through the rapid assimilation into the Ukrainian mass through the loss of language.

The situation will change after 1848, the revival of Bukovina will occur with the establishment of provincial autonomy starting with 1861. A period of spectacular development followed in Bukovina and implicitly, a numerical growth of the population. Sustained by the growth of the quality of life and the economic development, a cultural effervescence unfolded which unleashed the multiethnic free expression forces of the spiritual, literary and artistic cosmopolitanism, intensely valorized in the urban environment.

There was a unique cultural spirit in which the multiethnic vectors were harmonized, being converged towards the art center of Chernivtsi, becoming a notorious cultural treasure throughout Europe, grounded on urban philo-germanic culture and obvious in the literary and musical production, from the Jewish theatrical art, from Slavic and Romanian lyricism and from the elation of the Roma people.

The Jews subordinated linguistically to the Germans, the Armenians underwent a complex process of acculturation under the domination of the Poles and the Ruthenians; the Lipovans and the Hutuli were subordinated according to their territorial position either to the Romanians or to the Ukrainians, the cultural vectors indicating the dispersion and the cultural diffusion.

A form of cultural pressure produced within the Armenian community was due to the existence of permanent religious dissensions based on the presence of two distinct Christian denominations. The maneuvers practiced by the Catholic missionaries of converting the Armenians who follow Monophysism to Catholicism largely failed. But some of the Gregorian rite Christians crossed the Catholic Church, generating changes in statistical evaluations.

Another particularity was generated by the gradual achievement between two parietal cultural groups, the Armenian and the Polish, situated in the upper position in the social psychologic structure, a process shaped by the course of historical time.

The vectors indicated an exchange of values in both directions but the geopolitical situation of the empire and the positioning of ethnic groups towards the *cultural hearth*¹¹ was different, more favourable to the Polish than the remote Caucasian Armenian center, inclined the balance of cultural transfer in favour of the Polish community. The process of structural assimilation followed, leading to the dilution of the Armenian identity. The polonization of the Armenians residing in Galicia was a complex process that started before Bukovina came into being. The Galician Armenians have adopted the Polish attitudes and behaviour, but most importantly they gave up their native language, many of them using the Polish language. These Polonized Catholic Armenians entered Bukovina while it was subordinated to Galicia. In the censuses carried out, the Polish Armenians were registered as ethnic Polonians. Having succeeded economically, many of these Armenians or their descendants returned to Galicia.

The end of this social complex process conducted by the imperial political-administrative naturally occurred in the 1860s. After this date in Bukovina, the number of allochtones arriving in previously established colonies significantly reduced, the numerical increase of the population being achieved by the contribution natural growth. The cumulative factors that triggered the cessation of the process vary, but the decisive moment was represented by the revolution and historical events of 1848 and its effects. The idiographic character of the movements of the social masses in Bukovina was highlighted by the struggle for the setting up of new associative social laws, both the desire of the peasants to own property and the collapse of the colonies. The 48th Revolution of Bukovina brought together for the first time the interests of the majority of the members of the ethnic communities in order to obtain the status of autonomous province within the empire. Thus, in the new Constitution of Bukovina on February 26,

¹¹ Sauer C. (1925) The morphology of landscape. University of California Publication in Geography 2 (2)-19-53 and Sauer C. (1925) Agricultural origins and dispersals. New York: American Geographical Society.

1861 was for the first time specified the provincial autonomy, confirmed by Franz Joseph I in 1862 by royal diploma¹².

Conclusions

The colonization process in Bukovina was a particular piece of the demographic kinetic complex of the global engine that produced the transformation of the sociosphere into the Modern Age. The industrialization, enlightenment psycho-social reformulations, political remodeling of space are just a few of the generalized phenomena induced by extremely diverse, complex and particular regional causes.

The mechanism of the social system in modernizing Bukovina was initiated by the colonization process. The pressure of social and political factors has grafted on historically vulnerable areas, exemplifying the conjuncture with northern Moldavia, complicating psychosocially the existence of masses with a collectively unprejudiced mental culture neither for the new social order nor for multiculturalism and globalization.

The following types of colonizations for the Province of Bukovina can be identified as:

A. Under the direct management of the Austro-Hungarian Empire

- coordinated by the general Spleny
 - the Germans
 - the Jews
 - the Armenians
- coordinated by the general Enzenberg
 - the Germans
 - the Ruthenians
 - the Hungarians
- *Under the private management of the industrialists and landowners*
 - the Germnas
 - the Slovaks
 - the Poles
- Administrated by the Religious Trust
 - the Ruthenian
 - the Hutuls
 - the Gypsies
 - the Moldovians

B. Unorganized, by randomly settling immigrants without material benefits and administrative support

- the Ruthenians
- the Jews
- the Armenians
- the Poles
- the Transylvanian fugees
- the Moldovian
- the Hutuls
- the Gypsies

¹² An official request named *Chemarea Bucovinei* (Bukovina kalling) at the emancipation from 24 December, signed by the majority of the ethnic representatives.

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LEDIA THOMO¹, INES NURJA (HEBA)² AND KOZETA SEVRANI³

THE DECOMPOSITION OF INEQUALITY AND POVERTY IN ALBANIA

Abstract

The continuous fight to reduce poverty in the country brings the necessity to explore the contribution of different factors that might account for changes in poverty. The situation and the structure of population have changed with years. Also the situation in different countries have been changed through several effected factors related with migration flows, access, employment opportunities and other social-economic factors. The paper tend to show the inequality related with different factors like geographic division, employment, education, migration and the identification the determinants that have influenced on poverty difference by area and poverty change by years. It tends to show the poverty through decomposition of changes in growth and distribution components. The study will try an empirical application for all decompose poverty measures given the assumption that specific tendencies of the contribution components might impact the poverty measures differently. In this way we can identify the largest changed and impact to target a significant factors for different strategies related with rural, employment, children, etc. The study takes to the consideration ten years study through using as a base source of information the data from Living Standard Measurement Survey used to measure poverty and inequality. The analyses are done using different statistical package mainly SPSS and Stata.

Keywords: Poverty, decomposition, sectoral growth, inequality

JEL Codes: I32, I24, P25

1. Introduction and country background

The phenomenon of poverty has been known in Albania from late nineties but there have been only from 2002 that, with the support of World Bank and other international organization, that a regular system in collecting and analyzing the relative data establishes and is functioning nowadays in the National Institute of Statistics. Efforts have been done from the researchers in understanding poverty trends and compiling poverty profiles. Focus in this study will be put into evaluating the dynamics of poverty with regard to the contribution of different components like growth, inequality and spatial distribution. Understanding in details the determinants of poverty and how their contribution has evolved in time would enhance the effectiveness of policies in alleviating poverty in the country.

To understand the variation of poverty by effects of growth, redistribution and sectorial shift effects, a brief description of the situation in the country during the ten-year period of study can be done. The period of concern refers to the second decade after the liberalization of economy. In the first decade, after a strong economic decline, high levels of unemployment, high rates of inflation and massive migration towards the developed country, the situation was progressing quickly, given the effects of the stabilization programs on the economy.

Nevertheless, the country has known another drastic recession in 1997 of both economic and stability situation due to the crisis from the collapse of the pyramid saving schemes. From 1998, supported by the policies of economic stabilization and political stability, the economy recovered and grew rapidly recording an average of 7% growth of real GDP in 2008 (Figure 1 in Annex).

¹ INSTAT, Albania, lthomo@instat.gov.al.

² New York University of Tirana, Albania, inesheba@gmail.com.

³ University of Tirana, Albania, Kozeta.sevrani@unitir.edu.al.

The sustainable growth during most of the period had a very positive effect in the reduction of poverty that fell by 7.5 percentage points in 2005 from 2002, and 5.4 percentage points in 2008 compared to 2005 (Table 1 in Annex). Unfortunately for the country, from 2009, under the impact of the international crisis, the growth went through a slowdown process. The economic growth was weaker reaching the 1.4% in 2012.

As a result, in 2012 other parameters also showed to be worse off like unemployment and the poverty rate. The latter increased by 1.8 percentage points from 2008. The inequality instead, has been stable in time with slight increase and then decrease over time (Table 2 in Annex) confirmed by different measures of inequality. If, differences in inequality by urban and rural areas are explored, it is evident that the increase in 2005 compared with 2002 is the result of the increase in urban areas while the decrease in 2008 compared to 2005 is attributable to the decrease in the rural ones. The decrease in 2012 is related with the decrease in urban areas.

On the other hand, the continuous migrations outside the country, the internal mobility and the changes in the structural decomposition of the families have brought the shrinking of the rural areas in favor of the urban and richest ones. The shares of the population shift by 4.4 percentage points from 2002 to 2005, 5.4 percentage points in 2008, and 2.5 percentage points in 2012 in favor of urban population. (Table 1 in Annex)

The main objectives of this study are to evaluate how poverty changed due to growth, inequality and mobility effects. The rest of the paper will be organized in five sessions. Section 2 will give a theoretical background of the decomposition matter. Section 3 will present the methodology applied to the LSMS data. Section 4 will report the results of the decomposition and the related findings. Section 5 will end with conclusion remarks.

2. Theoretical concepts of the decomposition

The approach of evaluating poverty changes by decomposing the effect of its determining components is largely studied in the literature, regarding especially the developing countries that have a commitment in fighting poverty and have included it in their development country strategies. It is generally accepted that growth (moreover, if it is persistent in time) may bring the largest impact in reducing poverty, due to a positive effect in the incomes. However, it is intuitive that, despite growth would bring a decrease in the poverty of a country; the poorest people may not benefit the same from the increase in the mean income. It is largely debated that a decrease or increase in inequality may enforce or reduce the growth effect hence the redistribution has to be taken into account along with growth [1]. Another aspect to be added in the exploratory analysis is the sectorial shift and/or the population migratory effect. It is known the tendency of the population from the poorest areas to the richest ones, which can play a positive and sometimes a considerable role in alleviating poverty. In some studies, has been assumed that the migration, especially if associated with remittances to the original families can be a potent strategy used by the poor themselves to leave them out of the worse effects of poverty [2].

The decomposition technique generally relies on the Shapley value⁴ as a theoretical framework for various decompositions. The change in poverty can be measured by any class of indicators that can be decomposed into the sum of subgroup poverty indices. The aim is to evaluate the contribution of the explanatory factors on poverty changes and/or identify which subgroups show higher poverty and can be used to design cost-effective anti-poverty reductions. They can also be used to evaluate the contribution of each subgroup to total poverty. Shorrocks (1999) propose a unified framework based on

⁴ The Shapley value is a well-known concept used in the theory of cooperative games.

the Shapley value, and demonstrate that it can allow the derivation techniques for the decomposition process [3]. Let's consider, for example, the change in poverty, DP like the variable under study and its n contributing factors. The assumption is of course that the n contributing factors determine completely and independently the value of DP . Two properties are required indeed for the decomposition process: first to be symmetric (or anonymous ensuring that the contribution of each factor is not depending from the order in the list); second to be exact (and additive). The principle of the procedure is to evaluate the marginal effect on the change on poverty, removing each contributing factor in sequence and computing their mean for each factor for all the elimination sequences. This mean is the contribution of each factor to the change of the studied variable and the procedure, gives that way, an exact additive decomposition of DP into n contributions.

The application of Shapley decomposition has been used to study the extent to which the economic growth can help reducing poverty. Growth is normally expected to raise incomes of the poor and reduce the value of a poverty index, but this tendency can be moderated or even reversed when the growth is accompanied by redistribution in the direction of increased inequality. The most frequent used method to separate effects of growth and redistribution on the change in poverty between two points of time (t_0 , t_n) is given by Datt and Ravallion (1992). They demonstrated that the change in poverty measures (given a fixed poverty line) between two points in time, can be expressed as a function of the mean income and the Lorenz curve. It can be decomposed in a pure effect of growth, which corresponds to the poverty change that would have been observed if the Lorenz curve observed at time t_n remain unchanged, and the pure redistribution effect, that is, the poverty change that would have been observed if mean income at time t_n had been equal to mean income at time t_0 . It results a residual term that originates from the interaction between the growth and redistribution effects. This is different from the Shapley approach where the contributions of growth or inequality components were averaged with respect to the mean income levels in the two periods or Lorenz curve prevailing in the base and final years. Datt and Ravallion instead associate the growth and redistribution effects with the marginal change in poverty using as reference the base year. A middle way between the two alternative decomposition procedures is to measure the growth effect as the average of the two growth effects. This also requires measuring the redistribution effect as the average of the two redistribution effects. Proceeding in this way has the advantage of eliminating the error term in the poverty decomposition. However, according to the same authors, the initial date of the period has been considered a natural choice for the decomposition process and recommended to be used in the empirical work.

Important studies have been done related to the effects of growth in the poverty alleviation of the countries, and it has been argued that the magnitude of the relative contribution depends further on the country levels of economic development, the initial inequality and the aversion towards inequality [4]. The effect of growth comes along with the elasticity of poverty measures towards growth and the level of inequality. Evidence has been used to illustrate, that countries with an initial low level of inequality benefit more than countries where the initial level of inequality is high. In this context, the aversion of society towards inequality is also important. A negative redistribution effect can offset gains from growth in alleviating poverty, and the redistribution in favour of the poor can increase the reductive effects of growth in poverty measures. This latter, in some rare cases can reverse the effects of negative growth and bring poverty alleviation by the improvements in inequality alone.

The effects of growth to poverty changes in a country, according to the literature, are considered as the major explanatory variable that counts for the changes in the incidence of poverty. Indeed, as they depend largely on the sensitivity of poverty measures for the growth, the relevance of growth declines moving from headcount of poverty to the gap and squared gap of poverty. This is explained by the fact that more bottom sensitive poverty measures place more weight on changes in the distribution than on growth. Reduction associated with a given growth rate, depends on a distributional correction (one

minus the initial Gini inequality index). Therefore, depending on the initial level of inequality, a one-percent increase in income levels could result in a high-poverty reduction for low inequality countries or low poverty reduction for countries with high inequality. When growth comes with an increase in inequality, it offsets gains from the poor from increased growth in economy. It is to say that growth is an instrument against poverty when growth comes with falling inequality.

3. Methodology

The two main decomposition methods that analyses changes in poverty over time are into sectors and by contributions of income growth and changes in inequality.

3.1. Decomposition into growth and inequality

Following the methodology of Datt and Ravallion (1992), the decomposition in growth and inequality of poverty measures based on the absolute poverty line z^5 , take into account the mean income of the distribution μ , and the Lorenz curve representing the structure of relative income inequalities L . The poverty measure at time t can be written as:

$$P_t = P\left(\frac{z}{\mu_t, L_t}\right)$$

Where P_t is the poverty measure at time t , z is the poverty line (using constant prices), μ_t is the mean income at time t and L_t is a vector of parameter that fully describes the Lorenz curve at time t . The method is based on the assumption that the variation of poverty may be explained by growth and inequality. Therefore, we can explore the effects of growth maintaining the Lorenz curve constant at a reference level L_r , and the effects of the redistribution of income maintaining mean income constant at the reference level μ_r .

The changes in poverty will be decomposed into growth and inequality impact using the formula:

$$\Delta P = P_{tn} - P_{t0} = [P(\mu_{tn}, L_r) - P(\mu_{t0}, L_r)] + [P(\mu_r, L_{tn}) - P(\mu_r, L_{t0})] + R$$

Where $P(\mu_t, L_t)$ is the poverty measure corresponding to a mean income in period t of μ_t and L_t is a Lorenz curve⁶. The first term represents the growth effect and the second, the inequality, while the last term corresponds to the residual effect, often considered as the interaction effect of growth and inequality. To measure the decomposition of poverty, three general indexes are used: P0 – the headcount (or incidence) of poverty, P1 – the gap of poverty and P2 – the severity of poverty⁷. While an increase in the mean income can generate a reduction in the incidence of poverty, the two other indicators give an insight if the average income shortfall below the poverty line is increasing as well and if the poorest

⁵ The poverty line in Albania is set at 4891 ALL per capita per month (2002 prices), representing the minimum level of consumption that an individual can afford in order to be considered non poor. This level has been computed using the costs of basic needs methodology (Ravallion and Bidani, 1994).

⁶ The Lorenz Curve is a graphical representation of the cumulative distribution function of the empirical probability distribution of wealth.

⁷ The FGT class of indices (P_α) used for measuring poverty where $\alpha=0, 1, 2$ is the aversion of society towards poverty: P0 - measures the proportion of the population that is poor. P1 - measures the extent to which individuals fall below of the poverty line, indicating how poor the poor are. The sum of these poverty gaps gives the minimum cost of eliminating poverty, if transfers were perfectly targeted. P2 - averages the squares of the poverty gaps relative to the poverty line. It allows reflecting changes in inequality among the poor, varying the amount of weight on the expenditure level of the poorest members in society. (World Bank - Poverty manual).

of the poor have benefited from this effect.

The *growth component* represents the change in poverty attributable to changes in mean welfare (economic growth) when holding the relative distribution of the reference year constant.

$$G(t_0, t_n; r) = P\left(\frac{z}{\mu_{tn}}, L_r\right) - P\left(\frac{z}{\mu_{t0}}, L_r\right)$$

This is the change in poverty that would have occurred if everyone had experienced the same rate of growth as at the mean and therefore, maintained their position relative to one another (i.e. the distribution curve shifts but maintain the same shape).

The *redistribution component* represents the change in poverty attributable to changes in the distribution curve holding mean welfare constant.

$$D(t_0, t_n; r) = P\left(\frac{z}{\mu_r}, L_{tn}\right) - P\left(\frac{z}{\mu_r}, L_{t0}\right)$$

This is the change in poverty would have occurred if the observed change in the shape of the welfare distribution curve (i.e. redistribution) had occurred without any shift in the mean of the curve.

The *residual*, referred as the interaction term, represents the effect of the simultaneous changes in mean income and distribution on poverty that is not accounted for by the other two components. This is essentially, the part that cannot be exclusively attributed to growth or redistribution. When the residual term is not negligible in size, the interpretation of the other components may be taken with reserves [1].

3.2. Sectorial decomposition for urban and rural areas

If the population can be divided in subgroups that represent some different socio-economic characteristics, it might be worth evaluating the contribution of each group in the changes of poverty over some period of time. The measures of poverty used for this purpose can be again the FGT class indices (P0, P1, P2) given their additional property. The implication of this property is that the overall level of poverty would fall whenever poverty decreases within some sub-groups of the population and is unchanged outside that group. The methodology used follows the Ravallion-Huppi (1992) approach:

$$P_{tn} - P_{t0} = \underbrace{\sum_k (s_{t0k})(P_{tnk} - P_{t0k})}_{\text{Change in poverty}} + \underbrace{\sum_k (s_{tnk} - s_{t0k})(P_{t0k})}_{\text{Intra-Sectorial component}} + \underbrace{\sum_k (s_{tnk} - s_{t0k})(P_{tnk} - P_{t0k})}_{\text{Inter-sectorial component}} + \underbrace{\sum_k (s_{tnk} - s_{t0k})(P_{tnk} - P_{t0k})}_{\text{Interaction component}}$$

where t_0 is the initial year of the period, t_n is the final year and k is the sector, P is the poverty measure, and s is the population share. The purpose is to identify the factors that mostly account for the changes in poverty aggregates between dates t_0 and t_n in terms of changes in poverty within sub-groups and the population shifts between sub-groups.

The *intra-sectorial effects* are the contribution in poverty changes within sectors when we suppose that the population shares are the same as in the initial period. That is, the change in poverty is attributable to changes in poverty rates that would have occurred if the population shares in each sector did not change.

The *population shift effects* between groups are the contribution of changes in poverty due to changes in the distribution of the population across sectors between the initial and terminal periods supposing the poverty remains unchanged within sectors. It is to indicate to what extent initial poverty (base-year period) is reduced by various shifts in the population proportions in each sector between the two dates (0 and n). Their signs reveal whether the population tends to shift towards sectors in which poverty is falling [5].

The *interaction effects* arise from a potential correlation between population shifts and changes within sectors of poverty.

4. Empirical results and findings

The data present the decomposition of the change in poverty for the period 2002-2012 divided in three sub-periods 2002-2005, 2005-2008 and 2008-2012.

4.1. Contribution of growth and inequality

The first method of decomposition by impact of growth and redistribution of on the change in poverty underlie the extent to which growth can help in alleviating poverty and the related role in affecting this situation of the increase or decrease in inequality.

The overall growth in the study period has brought a reduction in poverty, from 2002 to 2012, with a fall in poverty by 11.1 percentage points as the result of growth that accounted in this reduction for 8.5 percentage points and the decrease in inequality contributing with 1.5 percentage points, though the scenario is different when sub-study periods are taken into account. The greatest influence of growth has been detected during 2002-2005 sub period where the increase in the mean income accounted for 10.0 percentage points in the reduction of poverty. However, given the increase in inequality, the gain from growth has been reduced by 2.3 percentage points. As a consequence, being the residual ineligible (0.3 percentage points), the poverty felt overall by 7.5 percentage points. During 2005-2008, both growth and the change in inequality contributed to the reduction of poverty. The positive growth accounted for about three percentage points in the reduction of poverty (a magnitude much lower than in the previous period) and the overall reduction (by five percentage points) in poverty, has been enhanced by a larger contribution (3.4 percentage points) of the redistribution of income of the population. The last sub period 2008-2012 has seen negative growth. As a result, the reduction of mean incomes accounted for an increase by 3.6 percentage points of changes in poverty. Nevertheless, the increase in poverty (by 1.8 percentage points) compared to the previous sub period is alleviated by the decrease in inequality, that contributed to the reduction of poverty by 1.8 percentage points. (Table 1)

Table 1. Poverty Decomposition of P0, P1 and P2 into Growth and Inequality, 2002-2012

P0	Change in Poverty	Growth component	Redistribution component	Residual
2002 - 2005	-7.476	-10.038	2.26	0.30
2005 - 2008	-5.41	-2.75	-3.37	0.71
2008 - 2012	1.80	3.64	-1.84	0.00
2002 - 2012	-11.08	-8.48	-1.50	-1.10
P1	Change in Poverty	Growth component	Redistribution component	Residual
2002 - 2005	-1.86	-2.66	1.08	-0.27
2005 - 2008	-1.47	-0.64	-0.94	0.10
2008 - 2012	0.58	0.88	-0.19	-0.11
2002 - 2012	-2.75	-2.30	-0.66	0.20
P2	Change in Poverty	Growth component	Redistribution component	Residual
2002 - 2005	-0.64	-0.97	0.51	-0.17
2005 - 2008	-0.59	-0.23	-0.41	0.05
2008 - 2012	0.28	0.31	0.01	-0.04
2002 - 2012	-0.95	-0.85	-0.22	0.12

Source: Author's calculations following Ravallion and Datt method.

As far as concerns the second and third measure of poverty considered in this study, the contribution of growth is smaller in magnitude (as refereed above the relevance of growth declines moving from headcount of poverty to the gap and squared gap of poverty). The poverty gap follows the same trend as the headcount of poverty. The contribution of growth component is positive related to the reduction in the poverty gap for 2002-2005 while the effects of the increase in inequality clearly augmented the incidence of poverty. During 2005-2008, both growth and redistribution contributed to the reduction of P1. In 2008-2012, the poverty gap increased as a result of the negative contribution of growth reduced by the decrease in inequality. For the overall period, seems that both growth and redistribution component contributed to the decrease of the second measure of poverty. Regarding the squared poverty gap, the results bring to similar conclusions except for the sub-period 2008-2012 when the increase in poverty is attributable both to negative growth and the increase in inequality.

4.2. Contribution of sectoral effects

The *second method of decomposition* uses the variable area of settlement with urban and rural modalities for the distributive analysis. The exploratory analysis of the intra and inter sectoral effects of the changes in FGT class poverty measures, gives insight in the contribution of urban and rural areas both within each zone and from the shift of population between them in the overall reduction of poverty for the period under study.

The fall in the incidence of poverty between 2002 and 2012 (by about 11% percentage points) was more attributable in rural areas (for its 14 percentage points) than in urban ones (for 7 percentage points). The rural areas, indeed, contributed in explaining the total fall of poverty by 74.1% in 2012. Population also shifted over the study time, from rural to urban areas. The inter-sectorial effects from the mobility of population from higher income to poorer areas were positive and considerable, and accounts for about 12.1%. That way, both the intra and inter sectoral effects contributed to the reduction of poverty. (Table 2).

During 2002-2005, the drastic fall in poverty that accounted for about 92.5% of the total change is almost equally attributable to the decline of the headcount index in urban (47.0%) and rural (45.5%) areas. The shift of population from rural to urban zones also contributed positively, with 6.0% while the interaction was not negligible (1.5%).

The 2005-2008 can be considered the most important period for the fall in rural poverty that alone accounted for 87.9% of the total decline. The effects of population shift have contributed much more, than in the previous period (by 12.7%), revealing that during this period, the population mobility has acted as a natural factor in reducing poverty.

In 2008-2012, as mentioned previously, the effects of negative growth brought an increase in poverty that was attributable for 88.8% to the contribution of the increase in urban areas and only 15.5% in rural ones. The continuous shift of population towards urban areas contribute to reduce the negative effect of the within sector increase in poverty, by 9.2%. This way, the population movement has had a positive impact on the overall change of poverty but with the negative consequence that migration in urban areas has contributed in fueling the urban poverty.

Table 2. Sectoral Decomposition of P0, P1 and P2 for urban and rural areas, 2002-2012

P0	Change in Poverty	Urban	Rural	Intra-sectorial effect	Population-shift effect	Interaction effect
2002 - 2005	-7.48	46.99	45.46	92.46	6.00	1.54
2005 - 2008	-5.41	7.41	87.87	95.28	12.63	-7.91
2008 - 2012	1.80	88.82	15.46	104.27	-9.16	4.88
2002 - 2012	-11.08	23.28	74.06	97.34	12.13	-9.47
P1	Change in Poverty	Urban	Rural	Intra-sectorial effect	Population-shift effect	Interaction effect
2002 - 2005	-1.86	49.26	43.75	93.02	5.07	1.91
2005 - 2008	-1.47	7.01	90.56	97.57	10.65	-8.22
2008 - 2012	0.58	69.97	31.57	101.54	-3.99	2.46
2002 - 2012	-2.75	24.72	74.04	98.76	10.25	-9.01
P2	Change in Poverty	Urban	Rural	Intra-sectorial effect	Population-shift effect	Interaction effect
2002 - 2005	-0.64	54.43	38.99	93.42	3.76	2.82
2005 - 2008	-0.59	9.75	89.48	99.23	8.57	-7.80
2008 - 2012	0.28	49.33	52.15	101.47	-1.06	-0.41
2002 - 2012	-0.95	30.26	68.09	98.35	7.53	-5.88

Source: Author's calculations following the Ravallion and Huppi (1991) standard approach.

The results of the decomposition for depth and severity of poverty show a similar trend evolution presenting however some particularities. The effects of the mobility of population towards urban and richest areas are less important when poverty gap is taken in consideration and even more so for gap squared. The contribution of urban area in reducing poverty gap during 2002-2005 is greater for P1 and even more pronounced for P2 revealing the fact that urban areas do better in reducing deepening and severity of poverty. During 2005-2008 the contribution of urban is greater for P2 revealing a continuous tendency in improvements for the poor of the urban poor. In 2008-2012, unlike the increase in headcount due for 88.8% to the urban areas, the increase in P1 and P2 due to urban contribution is less for P1, 70.0% and only 49.3% for P2. At the end of the whole period under study, the contribution of rural in the reduction of poverty was about three times higher than urban both for headcount and for depth of poverty, while it became lower for its severity (the contribution of urban being just half of the rural). The intra-sectorial effects accounts for most of the changes in poverty during 2002-2012 while the inter-

sectorial effects were positive and considerable for both bottom sensitive measures even that becoming lower with the α increase. That way, the poverty gap and poverty gap squared seems to have been less sensitive to the population shifts during the period revealing the fact that migration may have a major influence in reducing the incidence of poverty but the impact may be reduced when we consider strongly related measures to inequality.

5. Conclusions and recommendations

This study has analyzed the dynamic of the changes in poverty decomposing the contribution of the determinants: growth, redistribution and sectoral effects.

The empirical results show that between 2002 and 2012 poverty is reduced as a result of positive growth effects and decreasing inequality over the whole period. The influence of economic growth linked to the inequality has been explored with regard to the evolution of FGT class of poverty measures (headcount, depth and severity of poverty) during three sub periods 2002-2005, 2005-2008, 2008-2012 and 2002-2012.

There has been a considerable impact of growth during 2002-2005, that would have caused larger effect in reducing incidence of poverty if it would have not been suffering the offset gain from the rise in inequality. In 2005-2008, the continued positive growth effect (even that smaller from the previous period) have been reinforced by the decrease in the inequality. The 2008-2012 period have been characterized by negative growth effects and a decrease in inequality. The increase in poverty that would have occurred during this time, due to the decrease on the mean incomes, has been reduced due to the redistribution effects. These results confirm the importance of a pro-poor growth policy in a country to reduce not only inequality but also incidence of poverty. As far as concern the depth and severity of poverty they have shown a less sensibility to the growth and some larger impact of the inequality.

The decomposition by sectors focusing in urban and rural areas aims to quantify the sector contributions that have accounted for the poverty changes observed during the ten years period under study. During 2002-2012 periods, the reduction in poverty headcount has been the result of both urban and rural poverty decline but with larger gain in rural than urban areas, while the population mobility from rural to urban has had a positive and significant contribution. The significant fall in poverty during 2002-2005 was the result of equal contribution of poverty reduction in urban and rural, being reinforced by a positive and non-negligible effect of the population shift from rural to urban and high income areas. The continuous reduction of poverty in 2005-2008 was instead, largely due to gains in rural sector, while the inter-sectorial effects have had the largest impact during the whole period. This is to indicate that the rural areas were shrinking in favor of urban areas but leaving open the debate whether this migration of poor toward urban can be accommodated without problems of marginalization or would cause in the long run social problems and insecurity. In 2008-2012, the increase in urban areas over-accounted for the increase in total poverty, but the positive effect of the population shift contributed to reduce the worse intra-sectorial effects by allowing poverty to be lower than would have been without population mobility.

These empirical results may lead to some recommendations for targeting poverty reduction strategies combined with social protection policies. Basically they may lead toward two directions: a) empower the rural areas through programs that aim to alleviate poverty, subsidize the agriculture activities increasing employment and productivity, improve living conditions, and provide better education and increasing skills opportunities; b) increase interventions in the urban areas that host migrants improving accommodation facilities, infrastructure, basic and public services, provide qualifications courses, vocational education and employment opportunities to avoid fuelling urban poverty and the

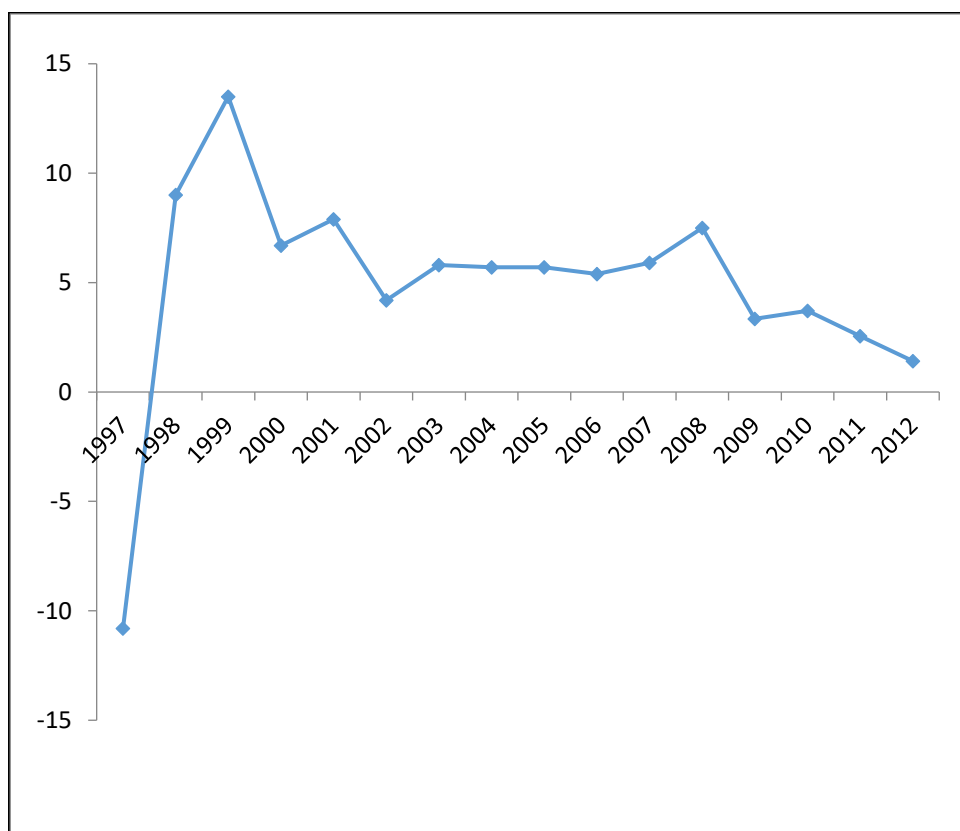
marginalized part of society.

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Annex

Figure 1. Annual real growth of GDP at constant prices compared to previous year in %, 1997-2012



Source: INSTAT, 2014, <http://instat.gov.al/en/themes/economy-and-finance/national-accounts-gdp/>.

Table 3. Poverty headcount and population shares evolution, 2002-2012

	Poverty headcount	Population share	Poverty headcount	Population share	Absolute change of P0
	2002		2005		2002-2005
Urban	19.5	41.71	11.1	46.15	-8.4
Rural	29.6	58.29	23.8	53.85	-5.8
Total	25.4	100.0	17.9	100.0	-7.5
	Poverty headcount	Population share	Poverty headcount	Population share	Absolute change of P0
	2005		2008		2005-2008
Urban	11.1	46.15	10.2	51.53	-0.9
Rural	23.8	53.85	15.0	48.47	-8.8
Total	17.9	100.0	12.5	100.0	-5.4
	Poverty headcount	Population share	Poverty headcount	Population share	Absolute change of P0
	2008		2012		2008-2012
Urban	10.2	51.53	12.5	54.0	2.3
Rural	15.0	48.47	15.5	46.0	0.5
Total	12.5	100.0	14.3	100.0	1.8
	Poverty headcount	Population share	Poverty headcount	Population share	Absolute change of P0
	2002		2012		2002-2012
Urban	19.5	41.71	12.5	54.0	-7.0
Rural	29.6	58.29	15.5	46.0	-14.1
Total	25.4	100.0	14.3	100.0	-11.1

Source: Author's calculations based on LSMS 2002, 2005, 2008, 2012 data.

Table 4. Inequality measures, National, Urban and Rural, 2002-2012

	National			
	2002	2005	2008	2012
Gini coefficient	0.28176	0.29627	0.28225	0.26019
General entropy index, Ge(1)	0.13223	0.15105	0.14074	0.11986
	Urban			
	2002	2005	2008	2012
Gini coefficient	0.28450	0.29715	0.29471	0.27720
General entropy index, Ge(1)	0.13669	0.15380	0.15679	0.12705
	Rural			
	2002	2005	2008	2012
Gini coefficient	0.27114	0.27316	0.26001	0.25683
General entropy index, Ge(1)	0.12110	0.12381	0.11257	0.10834

Source: Author's calculations based on LSMS 2002, 2005, 2008, 2012 data.

TIMUR MADREIMOV¹ AND LI LEIMING²

GAS DEMAND AND GROWTH IN MIDDLE INCOME COUNTRIES

Abstract

In this study we explore the link between gas demand (consumption) and economic growth. Earlier studies have shown that renewable and non-renewable energy consumption is significantly related to economic growth. While earlier studies have been limited to a single country or case studies, this study utilizes the advantages of panel data. Our sample contains, middle income nations which data is available over the period 2006-2015. We use fixed effects and Arellano Bond linear dynamic panel-data estimation. Our results show that gas demand is positively and significantly related to economic growth. The results are robust for a set of validity checks. To tackle the environmental issues it is crucial for bureaucrats in emerging markets to shift to energy efficient technologies, understand the peak-valley phenomena when there are significant differences in gas demand and increase the rate of transformation to renewable energy sources.

Keywords: Gas demand, economic growth, peak valley

JEL Codes: F43, N10, O10

Introduction

The research on economic growth has identified that apart from investment, human capital, trade and institutions (Vinod & Kaushik, 2007), energy consumption is also an important driver of economic growth (Cheng, 1997; Nachane et al., 1988; Glasure, 2002; Paul & Bhattacharaya, 2004). For example, Nguyen (1984), applying the conventional Cobb-Douglas production model and incorporating energy consumption, documents that energy and growth are positively related in a sample of OECD economies. In a more recent research, Huang et al. (2008), extends the sample to cover the years 1972-2002 reports that energy consumption is important determinant of economic growth only for middle income nations. Likewise, Narayan and Smyth (2008) investigated how the causality runs between energy consumption and economic growth using data for G7 economies. Their findings suggest that energy consumption is causal to economic growth. Quantitatively, when economy increases consumption of energy by 10%, economic growth increases by 4%, *ceteris paribus*.

In this study we add to extant research on energy-growth nexus by investigating the impact of gas demand (consumption) on economic growth for a group of middle income countries. To do so, we use two conventional panel data statistical models such as fixed effects regression estimator and Arellano Bond linear dynamic panel-data estimation.

Considering that we explore the effect of gas consumption on economic growth, the dependent variable in this research annual GDP growth. We obtain this variable from World Development Indicators (WDI). The main independent variable is per person gas consumption, expressed in '000 cubic tons downloaded from BP statistical dataset.

We follow related cross-country literature on economic growth and include a set of other variables that predict GDP growth in our statistical framework. Thus, we add lagged per capita GDP (convergence speed), average years of schooling (human capital proxy), life expectancy (productivity proxy), gross

¹ China University of Petroleum (HuaDong), China, tmadreimov@bk.ru.

² PhD professor, School of Economics and Management, China University of Petroleum, China, sdllming707@163.com.

fixed capital formation as % of GDP (investment rate), exports plus imports normalized by GDP (openness), government final consumption expenditure as % of GDP (government spending), foreign direct investment (FDI) inflow, population growth, inflation rate and democracy index (democratization rate).

Table 1. Variable definitions, data sources, and summary statistics

Variable	Description	Mean	SD
GDP growth	GDP growth (annual %) Source: World Bank	4.04	7.18
Gas consumption	Per capita gas consumption in '000 million cubic meters Source: BP dataset	0.82	0.97
GDP per capita	GDP per capita, PPP (constant 2011 international \$) Source: World Bank	7.5	5.52
FDI	Foreign direct investment, net inflows (% of GDP) Source: World Bank	4.31	8.58
Inflation	GDP deflator Source: World Bank	53.52	433.06
Population growth	Population growth (annual %) Source: World Bank	1.42	1.20
Investment	Gross fixed capital formation (% of GDP) Source: World Bank	23.51	12.37
Democracy	Democracy index Source: Freedom house	4.13	1.83
Trade	Trade as % of GDP Source: World Bank	84.41	41.82
Government spending	General government final consumption expenditure (% of GDP) Source: World Bank	15.73	9.09
Human capital	Average years of schooling Source: Barro Lee dataset	7.41	2.88
Life expectancy	Life expectancy at birth, total (years) Source: World Bank	68.12	9.76

Source: World Bank.

The econometric model to estimate the effect of gas demand (consumption) on economic growth can be expressed as:

$$growth_{it} = \alpha_1 + \alpha_2 Y_{i,t-1} + \alpha_3 GAS_{i,t} + X'_{i,t} \gamma + \delta_t + \varphi_i + \varepsilon_{it} \quad (1)$$

where growth is the average annual GDP growth for country i in year t . Y is logged GDP per capita in year $t-1$, GAS is per capita gas consumption, X is a set of control variables. δ represents unobservable time effects, φ captures country effects and ε is an error term satisfying normality assumptions. The descriptive statistics for the variables used in this study are presented in Table 1.

We now report the key results in Table 2. Column 1 presents the results for the fixed effects regression. As expected gas consumption is positively and significantly linked to economic growth, at the 10% levels. For example, a 10% increase in gas consumption is associated with nearly 1.1 percentage points increase in GDP growth.

Turning to control variables in column 2 we find that:

- Lagged log GDP per person is negative and significant displaying a convergence trend across middle income countries
- FDI seems to be an important ingredient of economic growth in the region. For example, a 10 percentage points increase in FDI as a share of GDP is associated with 0.8 percent increase in GDP growth
- Investment rate, human capital and trade openness also matter for economic development in middle income countries.

Table 2. Main results

	(3) Fixed effects	(4) Arellano-Bond
Gas demand, log	2.192* (1.116)	2.386** (0.973)
GDP per capita lagged, log	-20.837*** (3.322)	-23.664*** (2.823)
FDI as % of GDP	0.080*** (0.021)	0.080*** (0.019)
Inflation rate	0.090** (0.040)	0.054* (0.033)
Population growth	0.191 (0.173)	0.185 (0.149)
Investment rate	0.546*** (0.084)	0.462*** (0.079)
Democracy index	-0.255 (0.424)	-0.141 (0.361)
Trade as % of GDP	0.047*** (0.014)	0.042*** (0.013)
Government spending	-1.056*** (0.159)	-1.252*** (0.155)
Human capital	1.073** (0.485)	1.657*** (0.497)
Life expectancy	0.941*** (0.326)	0.938*** (0.278)
GDP growth lagged		0.044 (0.050)
Constant	137.483*** (30.718)	166.806*** (25.781)
N	320	287
adj. R ²	0.379	

Standard errors in parentheses
* p<0.1, ** p<0.05, *** p<0.01
Source: Authors.

Conclusions

While earlier studies explored the effect of aggregate energy use on economic growth, this study extends this line of research by researching the effect of gas consumption on GDP growth for a sample of middle income nations for the years 2007-2015. Our estimates suggest that gas demand (consumption) is an important aspect of economic growth in developing regions.

A probable argument could be that middle income countries are associated with energy models that switch from conventional fuel sources to gas driven manufacturing and services, this gas consumption may have significant effect on economic growth.

The results in this research not only assist to extend related literature, but are also entitled to greater attention from policy makers in developing countries where economic growth is energy intensive and greater ecological degradation takes place. To tackle the environmental issues, it is crucial for bureaucrats in emerging markets to shift to energy efficient technologies, understand the peak-valley phenomena when there are significant differences in gas demand and increase the rate of transformation to renewable energy sources.

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REZART PRIFTI¹

BLENDED LEARNING: INNOVATING TO IMPROVE ALBANIAN EDUCATION SYSTEM

Abstract

Albania is living in an era of accelerating change, not only regarding socio – economic development, but technological as well. Also, the rise of online technology has change the way people learn and has created the so called modern classrooms that enable student's imagination and boosts their conceptual skills. The purpose of this paper is to analyse the attitude and the perception of teachers and students about blended learning in vocational high schools. Highlighting the growing importance of blended learning, this paper focuses on the adaptation of innovative learning techniques as a quality improvement in the Albanian education system. A focus group of teachers and students was formed in three regions of Albania, who took part in blended learning classes with dedicated online learning management system and a survey was assessed to evaluate their reactions. The results show that both teachers and students find the integration of technology in learning a necessity in improving the education quality, both in teaching and in learning. They perceive improvement in understanding of the classes, motivation and dedication, learning environment and critical thinking.

Keywords: Blended learning, learning management system

JEL Codes: O32, O35, I22

Introduction

Today learning ecosystems have been disrupted by different tools and instruments suiting the purpose. The prolific use of technology has changed and moved the ways of learning, communicating and socializing. Considering technology integration in learning, another concept that comes to light is the place will replace the brick and mortar class room, or the one that will be the virtual classroom, otherwise called online platforms that serve as the ecosystem of learning and teaching process.

The terminology used for such virtual platforms that manage the learning and teaching process is Learning Management Systems (LMS). This is the habitat of students/pupils and teachers which allows them to manage their day to day duties, which normally are performed manually in the classroom. The matters in question here are several. For once, is whether the learning process will be fully integrated or not (or somehow integrated). Second, whether to use an objectivist or constructivist teaching and learning approach. Third, should the whole process be more oriented to in-person teaching or mostly online teaching. If the second one than what to do with the time in class? Fourth, if introducing the concept of blended learning then how to decide which model to implement? Fifth, how to design an online course that offer more interaction between students, and how to create digital content?

Shifting the learning process online might be a viable option in overcoming the issues mentioned before. Moreover, technology improves access to education by bringing learning materials to a wider audience, also giving students a wide selection of options thereby making the whole process more student oriented. Online learning is already a main driver in all kinds of education; higher education, K-12, corporate training, employee training, skills gaining, etc. Technology and new methods of learning aim to maximize the impact of the knowledge and skills gaining process through innovative teaching and building sustainable education systems

¹ University of Tirana, Albania, rezartprifti@feut.edu.al.

In the recent years, Albania is experiencing a technological development, altogether with the growing economy. The connection between education and employment will be more indispensable and technological change, along with technology infusion in education will foster this trend. Labour markets and job profiles are changing more frequently forcing people to continuously adapt and flexibly respond to new requirements. It is a well-accepted view that modern economies and sustainable economic growth are driven by knowledge, hence the term “knowledge economy”. This means that schools and universities should equip students with skills needed to compete in the job market. Late efforts do define the main skills needed for the 21st Century have depicted 7 categories: creativity & innovation, critical thinking & problem solving, communication & collaboration, information literacy, media literacy, ICT literacy, and life and career.

Albanian government has developed strategic documents for VET and during the last two decades it is gaining an important attention. Attention has been drawn not only to creating vocational education schools and trainings, but also to the modernization of the system as a whole, this way a well suited and sustainable architecture for future generations can be set up.

Professional education is seen as a tool bringing the young labour force closer to the market. The number of students that decided to learn in a vocational school is growing every year, but still in Albania, the number of early school leavers is high. There are several reasons for this dropout phenomena; they may be family-related reasons, job-related reasons and/or school-related reasons (Doll, Eslami, and Walters 2013). Many students leave their schools because they don't like the lessons, cannot get along with teachers or they don't find the lessons too attractive for them (Rumberger and Lim 2008). In Albania however, the reality is somehow different. The main reason of student drops out is economic. Mainly from a traditional and skewed education system, students that enter in VET schools are the worst performers and also those that come from economically challenged families. Student drop out reasons and its study as phenomena is beyond the scope of this report and pilot study. However, taking into consideration the phenomena and the driving factors behind it can help us with new ways of learning that will ensure more engaging, economic, innovative and purposeful techniques of teaching and transposing knowledge. The modus operandi here is to know the importance of modernization of the system, investigate new techniques and technology infusion in education, measure their effects and develop an integrated new ways of learning approach.

Technology nowadays is turned as a way of living, especially for young people, which use it almost for everything. Also, the rise of online technology has change the way people learn and has created the so called modern classrooms that enable student's imagination and boosts their conceptual skills. Taking into the consideration those factors, we raise the question how attractive it will be to integrate technology in vocational high schools? Will it be difficult to integrate if there is no appropriate infrastructure, teachers and students are not familiar with technology? Adopting technology in the classrooms may highlight some other problems, like, what are the perceptions and attitudes of teachers and students related with technology use in class? How open are teachers to modulate their curricula appropriately for digital content? Therefore, in this paper we try to understand those attitudes and perceptions and to develop a general approach towards the integration of technology in education system in Albania.

Literature review

Blended learning

Since the mid-1990s, there have been proposed and tested to many empirical and theoretical models for designing online learning environments (Hannafin, Land, and Oliver 1999; Jonassen 1999; Morrison 2003). However, knowing the advantages and disadvantages of online and traditional model of learning

many researchers (Christensen, Horn, and Staker 2013; Garrison and Kanuka 2004; Graham 2006; Roseth, Akcaoglu, and Zellner 2013) have come to a hybrid form that include both face to face and online learning called “Blended learning.” The term “blended learning” represents a wide spectrum of delivery options, tools, and pedagogies, but conceptually refers to distance education that emphasized flexibility of time, place, and pace of student learning. Staker and Horn (2012) define blended learning as “any time a student learns at least in part at a supervised brick-and-mortar location away from home and at least in part through online delivery with some element of student control over time, place, path, and/ or pace”. Blended learning is a new innovative methodology of education that aims to combine the traditional and online way of learning. Designing a blended course has to incorporate many stakeholders and contextual settings. Integrating technology to facilitate the educational process and to expand the reach and scope is important in today digital context. Many authors (Picciano et al. 2012; Staker and Horn 2012; Watson 2008) argue that online and blended learning have experienced significant rates of growth in recent years, and further expansion is anticipated. Blended learning is seen as an instrument that help students to express their ideas, share with others, develop critical thinking and cognitive learning (Gardiner 1998).

In developing a blended learning environment is important to take into account the initial troublesness of a new ecosystem, resistance toward change, the fear of using technology in class of both teachers and students, because is important to remember that blended learning process not only requires educators to reconsider their pedagogical practices, but also requires students to acquire new learning skills (Collopy and Arnold 2009). As Campbell (2006) noticed, not only teachers but also students are to reconsider and change their attitudes, beliefs, behaviours, perspectives, and habits to be able to adapt to the use of technology efficiently. Bielaczyc and Collins (1999) noted that students and teachers react to new educational technologies with varied emotions, ranging from enthusiasm to disabling fear. This raise the problem of evaluating the perception and attitudes of teachers and students toward technology use.

Four models of practical blended learning

In literature are defined four models of blended learning (Staker and Horn 2012). Below we introduce main characteristics of each model:

1. Rotation model, in this model, students rotate between online learning and other learning modalities, either on a fixed schedule or at the instructor’s discretion. In this model, least one of the stations is an online learning station. This model includes some other sub models like, Station Rotation, Lab rotation, Flipped Classroom and Individual Rotation. In this model students learn primarily on campus
2. Flex model, in this model every class is divided into online and offline components. Instruction are delivered primarily by the Internet. Here, students switch between learning modalities on a customized, fluid schedule that uses online learning as its cornerstone.
3. Self-Blend model, in this model in addition to traditional courses at a brick-and-mortar campus, students take one or more courses online. Unlike full-time online learning, in this model, students may choose between online and offline courses at their convenience.
4. Enriched-Virtual model, under this model student does not necessarily come to campus every day. Learning is divided between online and offline components.

Constructive approach vs. Objectivist approach

If we analyse learning environments, it is important to understand their determinants. Richard Millwood, (2013) has developed a concept map with learning theories. To highlight some differences between a passive and an active approach to teaching and learning in this report we will discuss objectivist and

constructivist learning theories. There are many authors that have studied and compared objectivist vs. constructive approach in classroom environments (Cronjé 2006; Jonassen 1991; Lister and Leaney 2003; Miguel Baptista 2003; Moallem 2001; Vrasidas 2000).

To explain the objectivist approach in this article we are referred to Jonassen and Land (2000) as a more comprehensive definition on the topic. Teachers think that in learning process they have to effectively communicate ideas to learners by improving message clarity. In this context, teachers control learning process. Students from the other side are obligated to learn what teachers tell them, because is assumed that teachers know better. In this learning environment students have no need, desire, motivation, and interest to learn what teachers transmit to them and it is difficult for students to be creative and to develop new learning skills. Different from objectivist approach, constructivist approach puts more emphasize to students. Constructivist learning environments are student-centred environments where students control the learning process (Marra 2005). Therefore, students are those who set learning goals and objectives by creating this way an open and flexible learning environment. Teachers role in this environment is to direct students to resources, to find answers and give them time to think and develop new ways how to fix a problem and express their ideas (Brooks and Brooks 1999).

Important Caveats

In designing an effective online course is important to take into consideration several requirements. First of all, before creating an online course, it is necessary to identify resources needed. It is important to understand that developing a blended learning course requires technical resources and expertise especially when an institution is in early stages of such educational model. It will require investment in physical, technical and human resources. In addition, it will be necessary to evaluate the readiness of the institution for appropriate implementation of such model and assess whether existing course materials can be integrated with the new virtual material.

Secondly, when implemented blended learning is important to understand which lectures to bring into the class in face to face discussion and what to put online. For this reason, teachers have to adapt their curricula and design an effective online syllabus, which should reflect course description, leaning objectives, evaluation and grading. In that way to create an effective learning environment, teachers have to keep in mind students' workload, create active learning strategies and while the course is running teachers have to monitor students' understanding and engagement through regular feedback. Students' feedback will help to improve the course. Online and outside activities make up the third condition that have to be considered when developing a blended learning course. To make courses more attractive for students, teachers can use video lectures or weekly surveys in order to create an interactive learning environment but also to measure students' involvement and attitudes toward their courses.

Online learning gives students another opportunity to engage with the material. To use this blended learning tactic effectively, require students to complete assignments, presentations, or tests before moving on to the remaining portion of the course. Adding an online component in lectures improves communication with students. Teachers Not only can still communicate face-to-face, but can also have automatic (email) notifications as well as built-in bulletins for the student to see as they log into whatever system you use. Being online allows teachers to be available and make materials accessible anywhere, anytime.

Teachers and students can access the course content whenever they need to. Online assignments, course commenting and discussion boards naturally encourage student collaboration. In a blended learning classroom, you have the best of both worlds, with both online and offline teamwork opportunities. One of the greatest benefits of online learning, especially through an LMS, is data tracking and reporting.

LMSs have the ability to track each step the student takes throughout the course, including logins, time tracking and grading. This brings online learning full circle, allowing teachers to better engage with students and provide personalized materials based on what the data says. The table below summarize main elements of each stage.

Table 1. Important caveats	
Resources needed: <ul style="list-style-type: none"> • institutional resources • physical and technical resources • course readiness evaluation • institutional readiness • course team capacity 	Online and Outside activities: <ul style="list-style-type: none"> • lectures in class and online • weekly surveys • weekly walk in sessions • video lectures
Syllabus: <ul style="list-style-type: none"> • keep in mind student workload • create active learning strategies • maintain consistence across environments • high interaction • regular feedback (manual or automated) 	Grading Policy: <ul style="list-style-type: none"> • class participation • peer assessment • online quizzes • exams • group projects
Source: Boris (2004).	

Challenges of Blended Learning

Blended learning is e methodology that has its benefits and challenges. It is important to remember that designing an effective blended learning environment is difficult. Students and instructors often are required to acquire new skills and spend more time preparing for class. Listed below are some of the specific challenges that have been highlighted by research:

- Deciding which elements of a blended learning model requires in-person interaction and which ones are best mediated by technology is a complex decision (Aldrich 2004).
- Dahlstrom et al. (2013) found that while students expect technology to be used in the classroom, they still want the instructor to provide some guidance for its use. Therefore, it is important for instructors to use technology purposefully in their courses and make it clear how it is benefiting their students.
- As technology becomes more integrated with students' academic and personal lives, students become warier of their privacy (Dahlstrom et al., 2013).
- Some institutions and regions are resistant to changes in pedagogy that include the use of ICT (Hamuy and Galaz 2010) .
- Many faculty members have little training and experience using online tools in the classroom, and feel that they will not be able to use them effectively to meet students' needs (Haydn et al. 2014).

Learning management system

Owning to technology, nowadays knowledge is more readily available than ever before, not only for students but also for teachers. According to Prensky (2001), today's students have changed radically, so they are no longer the *people* our educational system was designed to teach. Learners today are

immersed in a variety of educational experiences, therefore teachers need to transform learning in their classrooms from a traditional model to a student-centred model, in a way to make students be more involved in classrooms. In order to do this, schools have to create an environment when students can be more responsible for their own learning and can develop analytic and cognitive skills (Gillani 2003). To manage this student-centred environment, is important to implement a Learning management system (Naddabi et al., 2007). A Learning Management System (LMS) is a software application for the administration, documentation, tracking, reporting and delivery of e-learning education courses or training programs (Ryann K. Ellis 2010). There is a lack in literature in defining the concept of Learning Management System, maybe because of its nature or the fact that essentially it is an evolution of various technologies used over the years. Parr & Fung, (2006) argues that there are some terms used for what they call *drill-and-practice programs*, such as, computer-managed instruction (CMI) (Baker 1978), computer-based instruction (CBI) (Clark 1985) and computer-assisted instruction (CAI) (Levy 1997; Niemiec and Walberg 1987). Learning management system is a concept emerging directly from the e-Learning, the first introduction of LMS is in the late of 1990s (Davis, Carmean, and Wagner 2009). ***It is designed to help educators create and deliver content, monitor student participation, and assess student performance.*** Through LMS, teachers, are able to create and integrate course materials, articulate learning goals, align content and assessments, track studying progress, create customized test for students. LMS lets you communicate your learning objectives, organize learning timelines, and make possible to learners exactly what they need to learn and when. LMS leverage is that it delivers learning content and tools strait to learners, and also ***can reach marginalized groups through special settings.*** Such systems have built in customizable features including assessment and tracking. Thus, learners can see in real time their progress and instructors can monitor and communicate the effectiveness of learning. One of the most important features of LMS is creating a streamline communication between learners and instructors. Such systems, besides making possible online learning, tracking learning progress, providing digital learning tools, manage communication, and maybe selling content, can provide different communication features. It is important to let know learners that can have real time feedback on their results. Another additional element provided by LMS systems are visual reports. The interface of this kind translates in easy, finely designed, easy to grasp information, the report about their performance and progress. However, to achieve high level of user experience design we should keep in mind that the two main groups have different needs to be assessed. From the instructor's perspective, the platform should be easy to learn, highly customizable, and fit for the organization. From the learner's perspective, it should be engaging, easy to use and understandable, and easily accessible.

Identifying the key elements for the student experience is essential for creating the right student experience in a learning environment. Moreover, such initiative has to rethink the role of the teacher because the traditional role slowly becomes rudimental. Shifting the mind set of both, the student and especially the teacher, is necessary for such an innovative process.

A learning management system should be able to do the following:

- Allow students to choose what to focus on and to take control of their own learning experience (Jabr and Al-omari 2010)
- Improve the interaction between students and teachers, through question bank students can ask questions and send them to the teachers (Jabr and Al-omari 2010)
- Use self-service and self-guided services (Ryann K. Ellis 2010)
- Personalize content and enable knowledge reuse (Ryann K. Ellis 2010)
- Help students to organize themselves to organize, to practice do their research at their own time and pace (Naddabi and Centre 2007)
- Creates an engaging and fun environment for students (Naddabi and Centre 2007)

Advantages of LMS

As an online tool, LMS has some advantages and disadvantage. According to Kakasevski et al. (2014) there are six major advantages of LMS, interoperability, accessibility, reusability, durability, maintenance ability and adaptability, which in themselves constitute the concept of LMS. Some other advantages include:

- A LMS supports content in various formats, text, video, audio etc.
- You can access materials anytime, from everywhere, teachers can modify the content, and students can see the update material
- The evaluation of students is more easy and offer a fair evaluation, based on student attendance and online quizzes
- Students and teachers can re-use the material every time they need

Disadvantages of LMS

Although there are many advantages of LMS authors have identify some disadvantages of using this system:

- Implementing LMS requires well build technology infrastructure. Teachers have to be willing to adapt their curricula from face to face lecture to online lectures (Samsonov and Beard 2005).
- Sometimes schools don't have the appropriate infrastructure to develop LMS, so it might be difficult to them to operate in this environment and adopt their curricula (Samsonov and Beard 2005). Some current research suggests that online teaching leads to an increase in teacher workload (Dralle 2007).

Interaction in online courses and digital content

Interaction in online courses

To understand the new roles and responsibilities of teachers and learners in online courses, we must begin with a discussion of the interaction in online course and digital content. The importance of interaction in online courses is studied from many authors (Anderson and Garrison 1998; King and Doerfert 2000; Moore 1989; Sherry 1996). (Kenny 2002) has described some dimensions that comprise the concept of interaction, such as computer confidence, flexibility, active learning and practicalities of teaching. Those dimensions constitute in itself the concept of interaction. According to Thurmond (2003), interaction is a reciprocal exchange of information between, learners, teachers and technology. Building on the idea of a systems approach to effective distance education, Moore (1989) highlighted the importance of interaction in online classes. Moore (1989) identified three types of interaction inherent in effective online courses: (a) learner-content interaction, (b) learner-instructor interaction, and (c) learner-learner interaction. Also these types of interactions are studies from other authors (Navarro and Shoemaker 2000; Smith and Dillon 1999; Swan 2001).

The definitions of the three types of interaction used in this article are referred by Moore (1989), given that he provides an in-depth explanation of all types of interactions. Moore (1989) explained that “without learner content interaction cannot be education”, this conclusion is a result of the fact that content change learners understanding and perspective. Other authors also identify some factors that affect students' perception of learning the course content; such as: time (Atack and Rankin 2002), clarity (Swan 2001), participation in online discussions (Jiang and Ting 1999) course content delivery method (Faux and Black-Hughes 2000). Additionally, Moore (1989), argues that teachers have to build their interaction with students to motivate, evaluate and make them be more involved. Thus, teachers have to

adopt their learning curricula to initiate and maintain student interest and engagement in online courses. Students will be able to interact with content in a more effective way if they interact with teachers. To successfully build and maintain a relationship between students and teachers Moore (1989) discussed the use of a wide range of tools like video or audio. The interaction between teachers and students is important to help student apply new knowledge. Students value the interaction with their teachers (Debourgh 1999; Thurmond et al. 2002) and much of the research reported in the literature strongly supported learner-instructor interactions.

Finally, Moore (1989) discussed about, that he called “the challenge to our thinking and practice in the 1990s”, the interaction between one student and other students, this interaction increases group work and communication and develop cooperation skills to students. Although that in online courses we don't have face-to-face interaction, studies show that the interaction in online course between students were sometimes increased (Lytle, Cross, and Lenhart 2001).

While Moore (1989) has classified those three phases of interaction in online courses, in literature we identify a fourth type of interaction, named learner-interface (Hillman, Willis, and Gunawardena 1994). This type of interaction may be present or totally absent in traditional classroom courses, and includes computer experience, access to technology and students' perceptions regarding the technology.

Digital content

One of the key components of blended learning is to identify what is already working well in your classroom, and what might be better suited as digital content. Teacher have to adjust their curricula conform virtual learning systems. Given that blended learning is a combination of face to face and online learning, teachers have to keep what is going well in face to face and add what could be more effective in digital format. Students nature is different, some prefer studying in the library, others need to be alone, there may be students that find it difficult speaking in public etc., thus the main goal of the teacher is to improve the learning experience for their students.

Creating digital content involves several components: content development, content management and content standardization. To better design a blended learning course is proposed to use backwards design process (Bonwell and Eison 1991). This process has three phases that need to be completed, first teachers have to established their learning objectives for the course, which will be served as guidelines, secondly teaches have to design the assessments, the way how they will measure the students' progress, and at least teachers have to choose the activities that students have to complete in order to achieve course objectives. In developing digital content teaches have to analyse existing course material, to find out if their course materials need to be revised before they are used in blended learning format, they can revise or change their course materials in a way to improve learning process and to adapt digital content. In creating online courses, it is important to take into consideration students nature and their attitudes toward such tools. Teacher have to create a flexible environment for everyone who have to use this platform. In literature, this concept is defined as Universal Design Learning. This concept was developed by Rose and Meyer (2002) and it is comprised by three principles which servers as its core components:

- Multiple means of representation to give learners various ways of acquiring information and knowledge
- Multiple means of expression to provide learners alternatives for demonstrating what they know
- Multiple means of engagement to tap into learners' interests, challenge them appropriately, and motivate them to learn.

In the literature of Universal design learning, we see this instrument also related with students with disabilities, risky students etc., this relation goes beyond the scope of this report, so in this study we confine the concept only with the its definition, its principles and tools how to develop an attractive and flexible learning environment. Flipped learning and active learning are two main tools that are used to make learning more universally designed.

Flipped learning

Flipped learning is a type of online learning in which the typical lecture and homework elements of a course are reversed. Students have lectures online when they study before they come to the class, while in-class time is devoted to exercises, projects, or discussions. The notion of a flipped classroom draws on such concepts as active learning, student engagement, and hybrid course design. As the Flipped Learning Network (2014) describes: “Flipped Learning is a pedagogical approach in which direct instruction moves from the group learning space to the individual learning space, and the resulting group space is transformed into a dynamic, interactive learning environment where the educator guides students as they apply concepts and engage creatively in the subject matter”. Typically, flipped learning incorporates video lectures, readings, online modules, online quizzes, and other online activities to engage individual students so they can come to class with background knowledge about the topic intact, and be more involved in active learning techniques during the face to face or online classes (Stone 2012).

Active learning

Active learning has received considerable attention over the past several years. The importance of such concept has stems from the research for alternatives to traditional teaching methods. Active learning is generally defined as any instructional method that engages students in the learning process. Active learning is different from the traditional learning where students passively receive information from the instructor. As defined by Stanford University, **active learning** means *students engage with the material, participate in the class, and collaborate with each other*. Active learning includes in its umbrella three elements: collaboration, cooperation and problem based learning (Prince 2004). This type of learning tries to increase cooperation, motivation and encourage creative thinking between students. To create such an environment some types of active learning are developed, like clarification pauses, self-assessment, large-group discussion, think-pair-share, brainstorming, group evaluations, case studies, hands-on technology, interactive lectures, experiential learning etc. (Bonwell & Eison, 1991).

Collaborative learning refers to a method when students work together for a common goal in groups (Rocca, Margottini, and Capobianco 2014). Working together encourages students’ motivation to study and promote positive interaction among students. According to Orr (1997) cited by Panitz (1999), collaborative learning is an interactive form of learning when teacher and students work together to achieve a greater understanding on what they are studying. Cooperative learning is almost similar with collaborative, but is differs from the fact that this is more structured, directive and closely controlled by the teachers (Kagan 1989). Rockwood, (1995), explains that both cooperative and collaborative learning have to do with groups, but cooperative deals exclusively with traditional knowledge while collaborative ties into the social constructivist movement. So, in this context collaborative learning is more open than cooperative one. While problem based learning, refers to a method when teachers introduce problems at the beginning of instruction and then lets students identify new ways on how to solve those problems. This method is considered “*the most innovative pedagogical method ever implemented in education*” (Rocca et al. 2014). Problem-based learning is based on constructivist approach about learning (Mergendoller, Maxwell, and Bellisimo 2000), because it is student-cantered (Chung & Chow, 2004; Glasgow, 1997) and self-directed (Miflin, 2004; Miflin, Campbell, & Price, 1999; Ryan, 1993; Schmidt & van der Molen, 2001).

Although, many authors find some difficulties in defining the concept of active learning and its components (Prince 2004), studies show that the application of certain elements of this method increase collaboration, motivate the students, and contribute to a more effective learning environment (Bell and Kozlowski 2008; Braxton, Milem, and Sullivan 2000; Major and Palmer 2001).

Methodology

We identified the most innovative methodologies used today in education and the newest tools used by the most advanced economies and industry and constructed a version of a new innovative virtual learning ecosystem. In this context, we introduced a new online learning platform with virtual material for several subjects. The content for those subjects were virtualized for testing purposes and were integrated with test assessments for each theoretical part. Courses were divided as usually in topics and each topic had its own theoretical material to be included such as: video lectures (not all subjects), power point presentations to be downloaded, illustrations, and test assessments. Tests were made of different types in order to experiment with students and teachers. It included simple tests such as true/false questions categories, alternatives, open questions, and more complicated puzzles, cross-words, and interactive assessment tools.

Teachers were introduced with the context of blended learning and many tools available to make their work easier. Teachers were subject of a four days training program on blended learning methods, virtual learning ecosystems, reporting tools, and assessment techniques. The training module was combined with pedagogical training on teaching methods. The training started with the introduction of institutional needs of such initiatives in order to give them the full perspective. It followed with registration in the platform and presenting them with its main features. After a full view of platform capabilities, they were put in the position of registering students in the system. Managing users in different groups and enrolling them to appropriate courses was part of the platform training scheme.

On the other hand, students, also were an important part of the piloting scheme. They were introduced with the platform and fully integrated. Students took a detailed tour in the course view mode and experienced how an online lecture, e-book section, and quizzes looked like. The feature of real time feedback on test results impressed most of the students. Teachers also saw the real time reporting as very useful. The testing of the platform took part using different devices including personal computers, lap-tops and tablets.

To assess the pilot phase, we used a range of evaluation methodologies including focus groups, online open questions and surveys, and in class observations. One size fits all surveys were created and adapted from previous research on the topic. Surveys were created in order to measure all the above-mentioned components and issues raised. We assessed reactions toward in class behaviour, online environment, devices used, teachers' behaviour regarding students, and how technology is perceived.

Toolset structure

The sample for this analysis is comprised of four vocational high schools in Albania, "Kolin Gjoka" high school in Lezhë, "Kristo Isak" high school in Berat, Industriale (industrial) "Pavarsia" high school in Vlorë and "Tregtare" (commercial) high school in Vlorë. From these 4 high schools are chosen 12 master trainers and two classes from each school. The first phase of the project drew the attentiveness of teachers not included in piloting phase, for this reason there were 15 teachers that express their interest to be part of this project. So, in total the sample was comprised by 27 teachers and 400 students. We have used both qualitative and quantitative research method in our research to better understand and address all the issues in developing a blended learning environment.

Pre-assessment

Focus groups

At the first phase of this project, as introduced above we have used focus groups. There are several reasons why we have chosen to use focus groups with open question at this stage of the project. According to Patton (1990), focus group interviews are a qualitative research method that consist of a carefully designed discussion which allows people to express their points of view in a group setting and provide researchers with indicators of program impact. Focused groups provide insights into how people think and provide a deeper understanding of the phenomena being studied, through these researchers can capture deeper information and can easy understand what are the real issues and how people think about a specific situations (Greenbaum 1998). Many authors have discovered that focus groups create the potential for “*good return on investment*”, given that they generate high-quality data with modest resources (Walden 2008). Said all these, we have decided to use this form of research to understand the real situation from teachers’ perspective. The aim of this stage is to get a snapshot on the current situation and build an understanding on the perception and attitudes of teachers regarding to technology use in their classes. Focus groups are organized into groups of 10 to 12 teachers facilitated by a moderator, each person is asked to answer the questions and then to discuss in group with each other for what they have head by their peers. Teachers are asked to answer seven open questions and discuss with each other’s regarding to technology factors that may be core elements in taking into consideration when decide to integrate technology in classroom. This form will help to identify the most important issues regarding to institutional infrastructure, learning methodology, teachers-technology familiarity. The first phase is a descriptive and exploratory approach to collecting data on needs and requirements from the participants and at the same time serves as a tool validation phase and served to better understand how familiar teachers are with the technology and if they find it useful to integrate it in their teaching. The organization of the second phase is also build based on focus group discussions and is designed to facilitate the process.

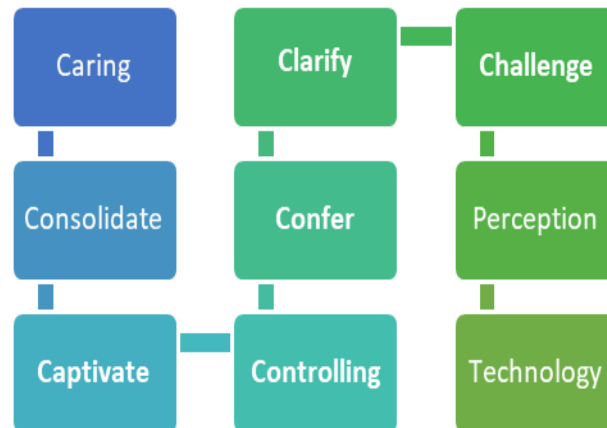
Mid assessment

Building on the outcome of the first phase, the second phase consists of gathering data and analysing the teachers and students’ perception and attitude toward technology use in classroom.

This phase is conducted by means of quantitative questionnaires, which are sent by email to all the participants part of the piloting project. Part of this phase has been both teachers and students. In developing such a platform is necessary to measure not only teachers’ attitude toward technology but also students’ perceptions according to their teachers and technology. Therefore, there have been developed two different questionnaires to gain insight of the technology use in classroom. This tool is used to collect information from teachers and students to measure their perceptions and attitudes. Through questionnaires we will take a snapshot of the current situation and we will better understand what teachers and students think about technology integration in their classes. For each stage is used a different questionnaire. Below is given the methodology for each one:

Students perception toward their teachers and technology questionnaire

Figure 1. Students questionnaire components

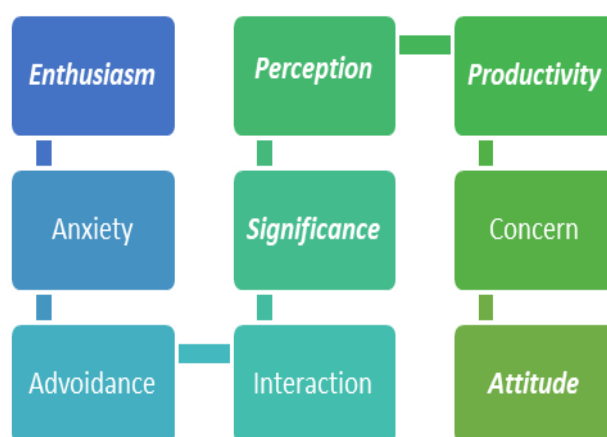


Source: Ferguson (2012).

The questionnaire developed for students is an adoption of 7 C's survey developed by Ronald F. Ferguson in 2001 (Ferguson 2012) and also 5 other questions related with technology use developed by the author based on literature review. This questionnaire is built to measure students' perceptions for their teacher, to better understand classroom learning conditions and have an insight into teaching practices and student engagement, also to gain an important student feedback regarding teacher behaviour's and the classroom environment. Measuring students' perception for their teacher helps to understand what factors teacher should take into account to make students be more engaged and motivated. This questionnaire has 7 blocks named: care, challenge, control, clarify, captivate, confer and consolidate. The seven Cs are designed to measure teaching practices when: **Caring** refers to the concern for students' emotional and academic well-being. **Captivate** refers to the ability of teachers to maintain student interest in learning. **Consolidate**, how teachers help students to integrate and synthesize key ideas. **Controlling**, identify if a teacher uses an objectivist or constructivist approach (Chen 2007). **Confer**, how teachers encourage and value students' ideas and views. **Clarify**, if teachers help students understand content and resolve confusion. Lastly, **challenge** refers to how teachers push students to learn new things and do their best. To evaluate students' level of agreement a five Likert scale format was used when 1= Strongly Disagree, 2 = Disagree, 3 = Undecided, 4 = Agree, 5 = Strongly Agree. The questionnaire includes 49 questions organized in 9 sections.

Teachers' attitudes toward technology questionnaire

Figure 2. Teachers questionnaire components



Source: Ferguson (2012).

Given that the success of using computers in classroom relies on teachers attitude toward technology (Albirini 2006; Baylor and Ritchie 2002), teachers' attitudes are considered as a major predictor of the use of new technologies in the educational settings (Albirini 2006). Thus, their attitudes toward computers can play an important role in acceptance and actual use of computers. To understand teacher attitudes toward technology, two separate questionnaires were used in this study, namely Teachers' Attitudes Toward Computers developed by (Knezek and Christensen 2009). This questionnaire was developed for a study analysing the effects of technology integration in education on teachers' attitudes. Sets of items were selected from 14 well-validated computer attitude survey instruments during the construction process (Knezek and Christensen 2009). This questionnaire includes 41 questions organized in nine items, *interest*, *comfort*, *accommodation*, *interaction*, *concern*, *utility*, *perception*, *absorption* and *significance*, plus a section named *attitude* developed by (Al-zaidiyeen and Mei 2010). A five Likert scale format was used to assessing teachers' level of technology use for educational purposes (1= strongly disagree, 2 = disagree, 3 = undecided, 4 = agree, 5 = strongly Agree). Achieving a meaningful use of computer technology in the field of education can be influenced by many factors. Through this questionnaire, we try to identify the main factors that influence the use of the technology in this sample with vocational high school teachers. The data collection was limited to vocational high schools' teachers in Berat, Lezha and Vlora. The intended population for this questionnaire research was 51 teachers.

Observations of students and teachers during coaching

Teachers were a heterogeneous group, meaning from different ages and different backgrounds. At the beginning when setting up course settings they had different coaching needs regarding their technology literacy. Nevertheless, the knowledge gap was manageable and can be handled in a one size fits all solution. Teachers were urged to add image illustrations to their text in the platform. Teacher that had no tech experience and were relatively older than others rushed to get images from the book that they had in print. Once it proved to be hard then asked for help. They were explained with a simple protocol of

how to find, select and edit in basic functionalities the image, and then attach it to the theoretical text in order for it to make sense and create context. If the imagery was relatively easy for many teachers, the whole process was not. During observations was noticed that teachers lack the vision of where the teaching methodology is going. Adding plain text, lack of material interactivity, and requiring in an old fashion way was reflected in how they constructed their courses initially. In this phase two well-constructed courses were introduced in order to show them where the process was going. Reflections started immediately. First, teachers contacted through mail and through the platform and wanted to know whose subjects were those and then started to modify their own based on that standard.

On the other hand, students were put in different situations. Some students started immediately with the platform and got right into the system. They almost immediately started using mainly communication channels such as chat box and forums. Beside communications students asked 'What do we do here know?!', - after they quickly went through the platform. This means that the platform needs structured digital and interactive content and teachers need to be coached for the right approach of using it. Other students were teased with other useful tools for learning. In one classroom, we introduced OneNote application as information repository and as a tool in order to help students with information acquisition. The approach proved needed development because of superficially using it did not give the whole picture of the tool. Getting them into OneNote first and then into the platform proved to be somehow confusing for students at the beginning. However, they started getting into the context and quickly made the difference of their roles.

Post Assessment

This section summarizes all the result from pre-and mid assessment. To summarize and address, the attitudes, perceptions, issues and experiences of teachers and students toward blended learning at this phase of the project it is developed focus groups interviews with teachers and students. This interview aims to identify and understand how the perceptions and attitudes has changed after students and teachers have been part of online platform. Also, we try to identify how satisfying was the experience studying in blended learning environment, students and teachers' preferences for particular aspects of blended learning. Students and teachers are asked on:

- How often they have used the platform?
- How easy was for them to understand the online platform?
- How helpful the platform was for them?
- What would they like to change?

Focus groups are organized into groups of 5 students, each person is asked to answer the questions and then to discuss in group with each other for what they have heard by their peers, teachers are asked individually, one by one. First, focus group is organized with students to identify and understand how their perception has changed now that they have been part of platform, then the second focus group round is organized with teachers, they are asked not only for their perception and attitude but also for platform functionalities. Teachers are asked to answer eight open questions and discuss with each other's regarding to the use of the online platform, its benefits and problems that they have faced using such a platform, which functionalities they used more, and what need to be improved. Students from the other side are asked to answer seven open questions and discuss their experience with this platform and how their perception have changes before and after they have been familiar with such method of learning. This form will help to identify if this platform has met students and teachers' expectations, and what need to be improve in future, in that way to better serve their needs.

Results and discussions

Focus group analysis: Teachers & technology

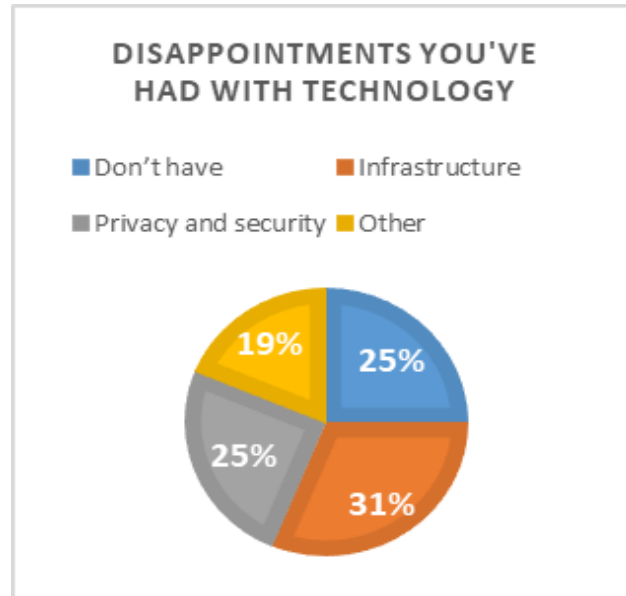
To measure teacher perception and their experience toward technology, during pre-assessment phase an interview with 6 questions was developed. There were 16 teachers that are asked for their positive and negative experiences with technology, what influence their decision to engage in particular technology and which are factors that are most important for them during technology process.

When asked about how and when do they use technology, most of teachers cited that they use technology a lot at their daily life and at their work. Also, they use technology in class for lecture presentations and projects with students. What is noticeable is that just two of sixteen teachers have answered that they do not often use technology, one of them argue that is comes due to the lack of materials. When teachers are asked about their positive experiences they have had with technology, it is observed that almost all of them have cited the importance of technology use in class for two main reasons, first of all it facilitates teachers work because it is more easy for them to find the right information, secondly technology in class according to teachers make students be more involved and motivated, it also makes lessons more attractive to students and it is reflected in students' participation and activation. Important to note is the fact that, also the two teachers that have answered to do not use technology so often, have had a good experience with technology. Moreover, one of them cited that when using technology, lessons looks more pleasant. Related with their bad experiences or disappointments with technology, many of them answered that they don't have any bad experience with technology use, whereas others classify the problems in two main pillars. First, is difficult for them to use technology because inadequate infrastructure, they mention the power outages, internet shortage and lack of technological equipment. The second pillar is privacy and security, teachers emphasize the problems related with plagiarism, data security and information security. Sometimes is difficult to understand if they are using appropriate information without falling into plagiarism.

Asked about who or what influence their decision to engage in particular type of technology, the answers where different, but to summarize all factors, teacher mostly mention, the speed of change, desire to walk with the pace of time, comfort that technology offers etc. The last two questions were related with the factors that teachers consider like most important for them, when they decided to engage in or use technology. Factors that push them to engage in technology are related with the satisfaction, motivation and the involvement of students. If integrated technology in classroom provide more information to students, help them to achieve their learning objectives, make lesson more attractive, improves performance and motivate students to be more involved, they are open and ready to implement and/or adapt the use of technology in their classrooms. It is worth mentioning the fact that the implementation of technology depends heavily on technological infrastructure, and internet access.

To this point, results show that teachers find the use of technology in classroom relevant for two main reasons: First, it facilitates teachers work because it is easier for them to find the right information, secondly technology in class makes students more involved and motivated. On the other hand, bad experiences with technology are related with bad infrastructure, privacy and security and teachers are ready to integrate technology in their classroom, the only problem with that is related with technological infrastructure, and internet access

Figure 3. Disappointments with the technology



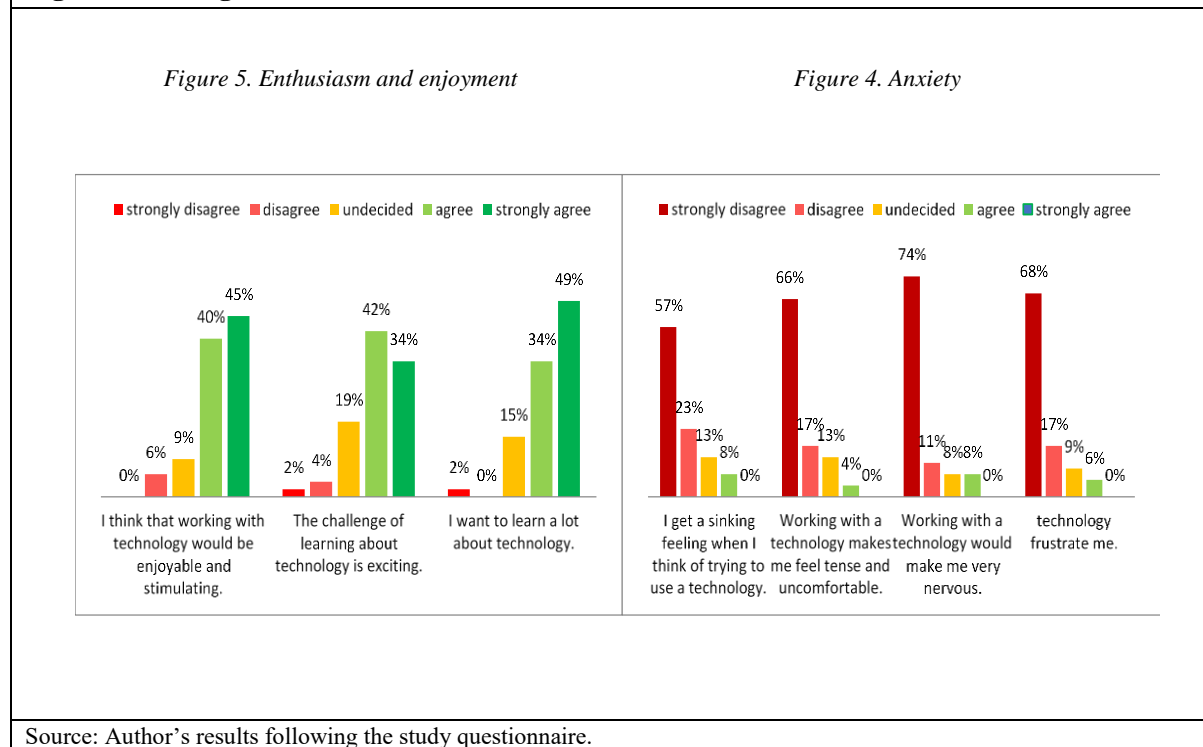
Source: Author's results following the study questionnaire.

In total the questionnaire from the mid assessment section was filled by 171 respondents, where 118 or 69% of them were students and 53 or 31% were teachers. In total, including both teachers and students the school located in Lezha had the most respondents comprising roughly 50.6% of the total, followed by 31.6% from the two schools in Vlora and 17.9% from the school in Berat. Overall, 52% of the respondents were female students/teachers and 48% were male students/teachers.

Teachers View

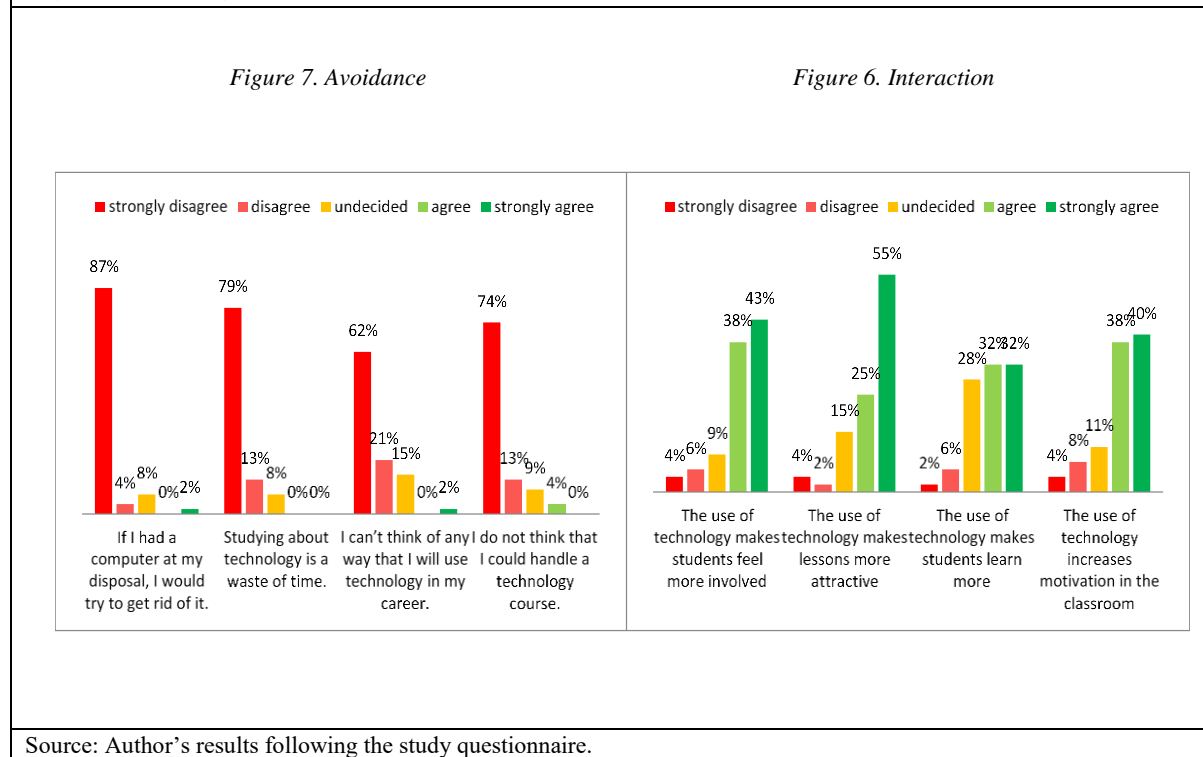
The sample is comprised by 53 teachers, 81% female and 19% male. The questionnaire was sent and filled online. The majority of teachers were from Lezha, vocational high school, 20 teachers or 38%, followed by Vlorë Tregtare 25%, Berat 21% and Vlorë Industriale 13%.

Figure 4 and Figure 5



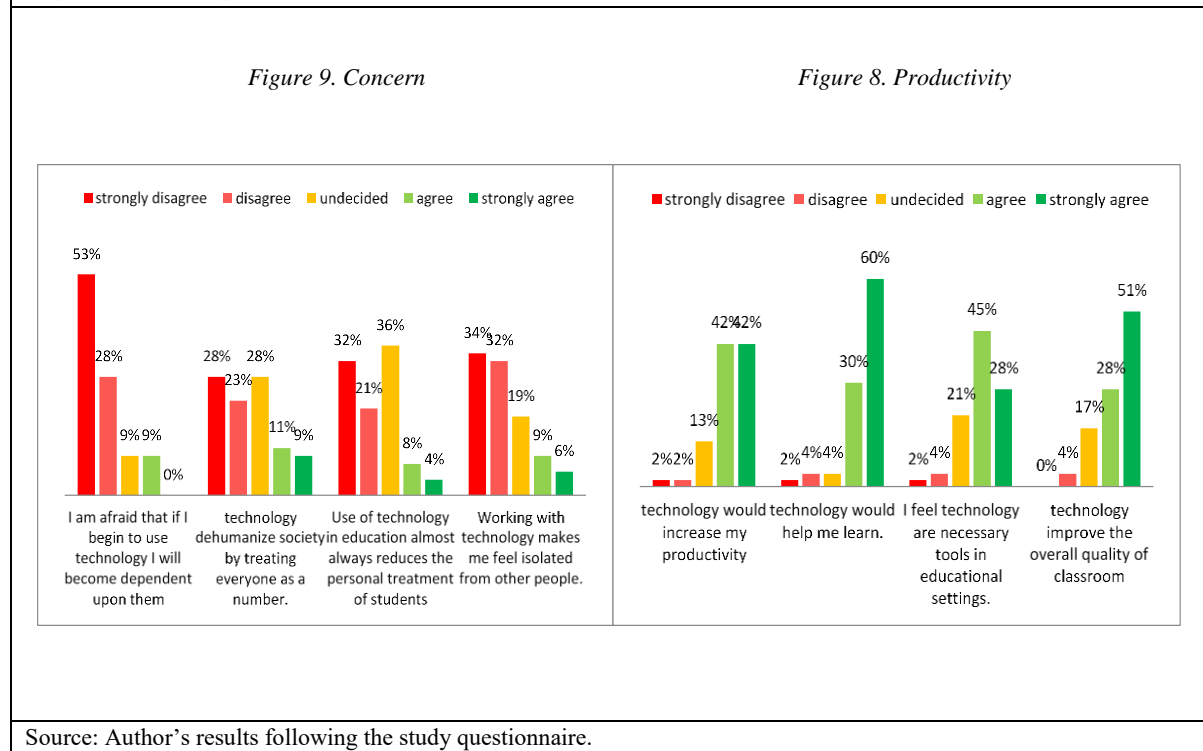
In analysing how enjoyable teacher see the use of technology in their work, we notice that the majority of them strongly agree that technology would be enjoyable and stimulating (45% + 40%), learning about technology is exciting (34% + 42%), and they want to learn about technology (49% + 34%). Study about how comfortable they feel using technology, we asked for the anxiety that could create by using technology and avoiding it. From the graphs, we can see that teachers don't agree with statements regarding to anxiety. They do not get a sinking feeling (57% + 23%), they do not feel tens and uncomfortable working with technologies (66% + 17%), teachers don't feel nervous when using technology (74% + 11%) and technology does not frustrate them (68% + 17%).

Figure 6 and Figure 7



According technology avoidance teachers strongly disagree to every statement, they do not consider studying about technology a waste of time and they are ready to handle a technology course. Regarding to interaction with technology, teachers think that the use of technology makes students feel more involved (43% + 38%), learn more (32% + 32%), more motivated in classrooms (40% + 38%) and makes lessons more attractive (55% + 25%).

Figure 8 and Figure 9



Teachers answer related with their concern in using technology shows an acceptance of this instrument, without being apprehensive about it. From the graph above we see that teachers are undecided (36%), about the reduction of personal treatment of student, that may arise from the use of technology. Moreover, regarding productivity, teachers claim that technology; would increase their productivity (42%), would help them learn (60%), improve the overall quality of classroom (51%). 45% of teachers agree that technology is a necessary tool in educational settings.

Teachers find technology as a significant tool, which will help them organize their work (40%). Also, they claim that technology is important for students and they should have the opportunity to learn about it at schools (70%). Technology is an instrument which could stimulate creativity to students, 43% of teacher strongly agree and 42% of them agree with this statement.

Figure 10. Significance and Figure 11. Attitude

Figure 10. Significance

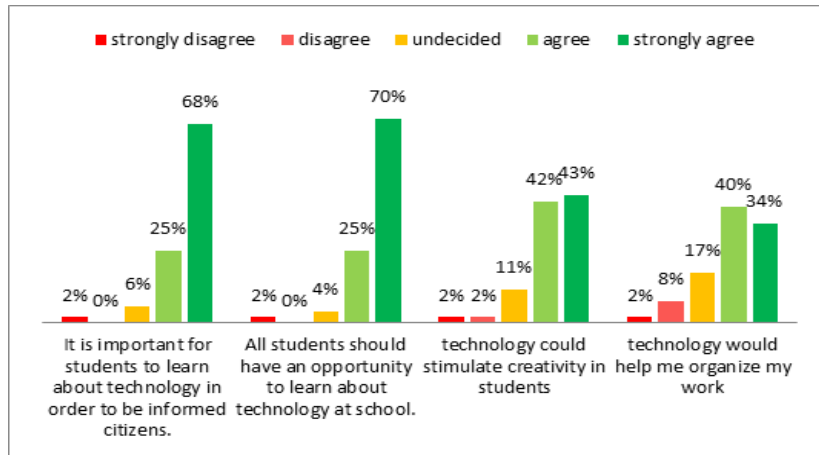
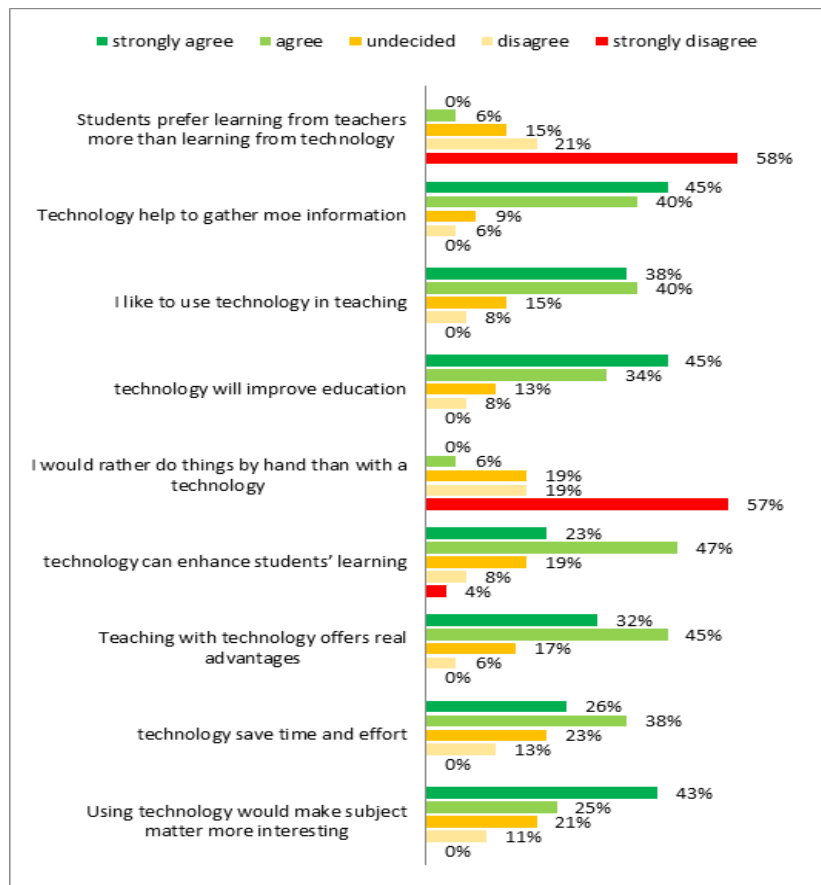


Figure 11. Attitude



Source: Author's results following the study questionnaire.

Analysing teachers' attitude toward technology offers a snapshot of the real situation. Teacher agree that technology helps them to gather more information, save time and raise effort, offers real advantages, make subjects matter more and also technology enhances students' learning. 40% of teachers argue that they like using technology in teaching and 57% of them strongly disagree with the statement "I would rather do things by hand than with a technology". What is surprising from the graph below, is the percentage of teacher disagreement with the statement "Students prefer learning from teachers more than learning from technology", 58% of teachers strongly disagree with this statement, which indicates for the acceptance of using or integrating technology use in classrooms.

Students View

The sample is comprised by a set of 118 students, 39% female and 61% male. The questionnaire was sent online to teachers, who then distributed questionnaires to students. The majority of students were from Lezha, vocational high school, 65 students or 56%, followed by Vlorë Industriale 17%, Berat 16% and Vlorë Tregtare 11%.

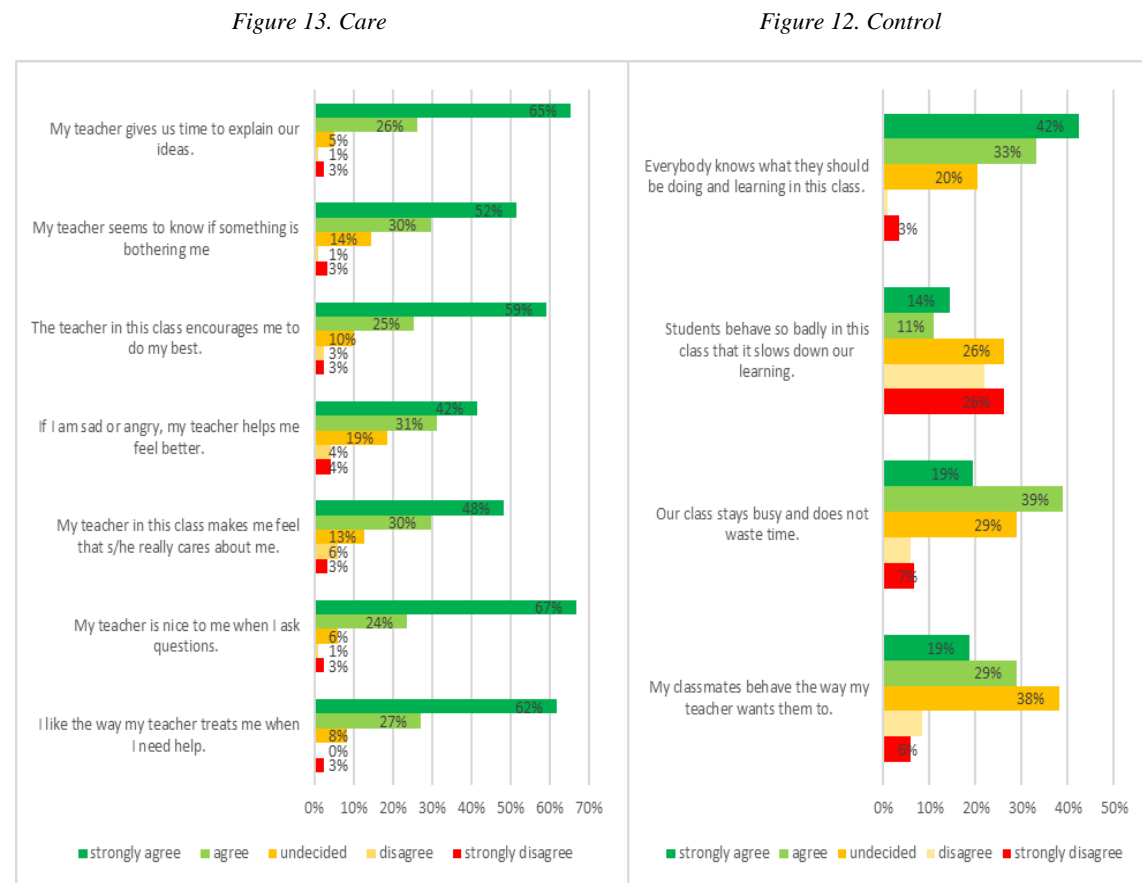
Table 2. Questionnaire score

Factor	Confer	Care	Challenge	Perception	Clarify	Consolidate	Technology	Captivate	Control
Average	4.33	4.32	4.24	4.18	4.10	4.06	3.85	3.73	3.44

Source: Author's results following the study questionnaire.

Starting with the average of each question we can notice several worth mentioning issues. The bottom of the table contains the two worst performing elements: captivate and control, exactly 3.73 and 3.44. Which means that student don't like the way they learn in class and teachers don't have classroom control all the time. When asked about the behaviour of students in classrooms (My classmate behave the way my teacher wants them to) 38% of students are undecided and only 19% strongly agree. From the table we can see that confer is performing better than other factors, which indicates for a constructive approach (Jonassen 1991), when students are involved in classroom and teachers encourage their students sharing their thoughts.

Figure 12 and Figure 13

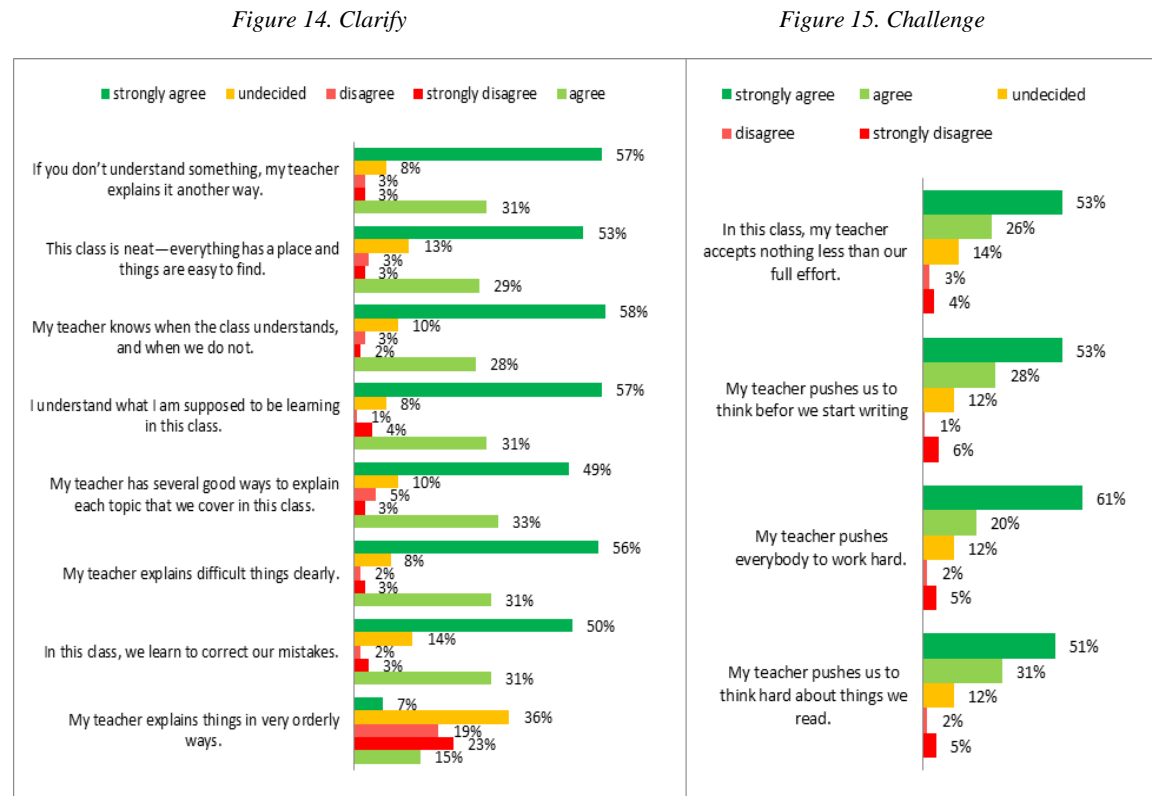


Source: Author's results following the study questionnaire.

Care (mean 4.32) contains an average of 4.32 from 5, what shows its importance. This factor shows how students think that their success and well-being really matters to their teachers. From the graph above we can see that exists a gap between statements (strongly agree to strongly disagree) of the students for each question. For all questions, students strongly agree that teachers give them time to explain their ideas (65%); teachers encourage them to do their best (59%); teachers are nice to them when they ask questions (67%) and they like the way teachers treat them when they need help (62%). It is worth mentioning the fact that in all seven questions related with the care, 3% of students strongly disagree.

Control (mean 3.44) measures the control that teachers have in their classrooms. Students answer that they know what they are doing and learning in class (42% strongly agree). They disagree for the fact that students behave badly in class, but what is observed is the fact that 26% of them are undecided. In this question, we have almost the same distribution of responses. This may come by the fact that, when it comes to their behaviour students are more careful when answering.

Figure 14 and Figure 15



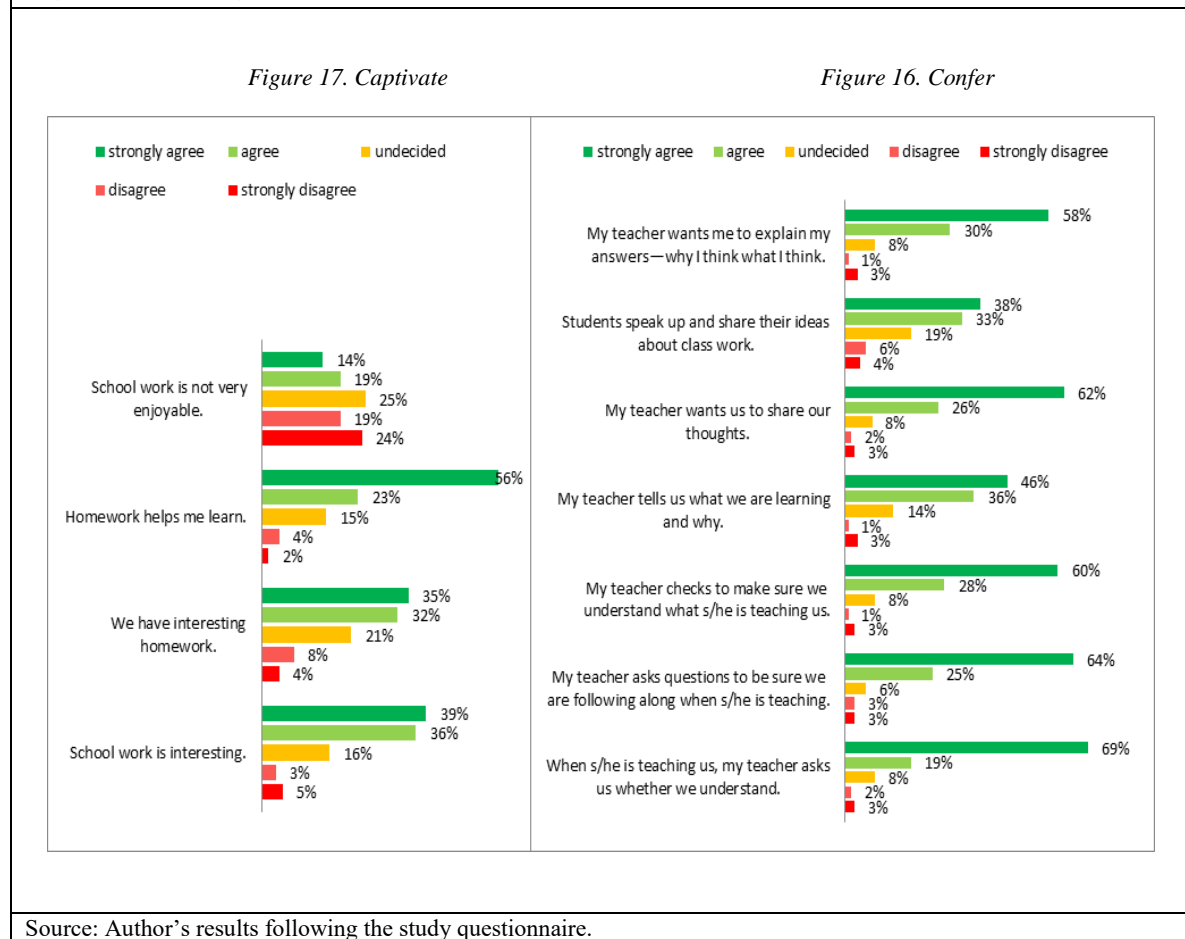
Source: Author's results following the study questionnaire.

Clarify (mean 4.1) stands for the clarity of the explanation and interpretation of the lesson from teachers. From students answers we see a strong agreement for each question related with clarity. They understand what teachers explain to them, and also confirm teachers using different ways to explain if students don't understand the lesson.

Challenge (mean 4.24) in our context means stress. Challenging students to work hard and think rigorously will succeed best if the right balance is found between imposing teachers learning objectives and allowing students to set and pursue their own goals in classroom. From the graph, above we can see that teachers encourage their students to think and work harder. Challenge is important because, without it students find it difficult to keep going when their natural impulse is to relax (Bill & Melidan, 2012).

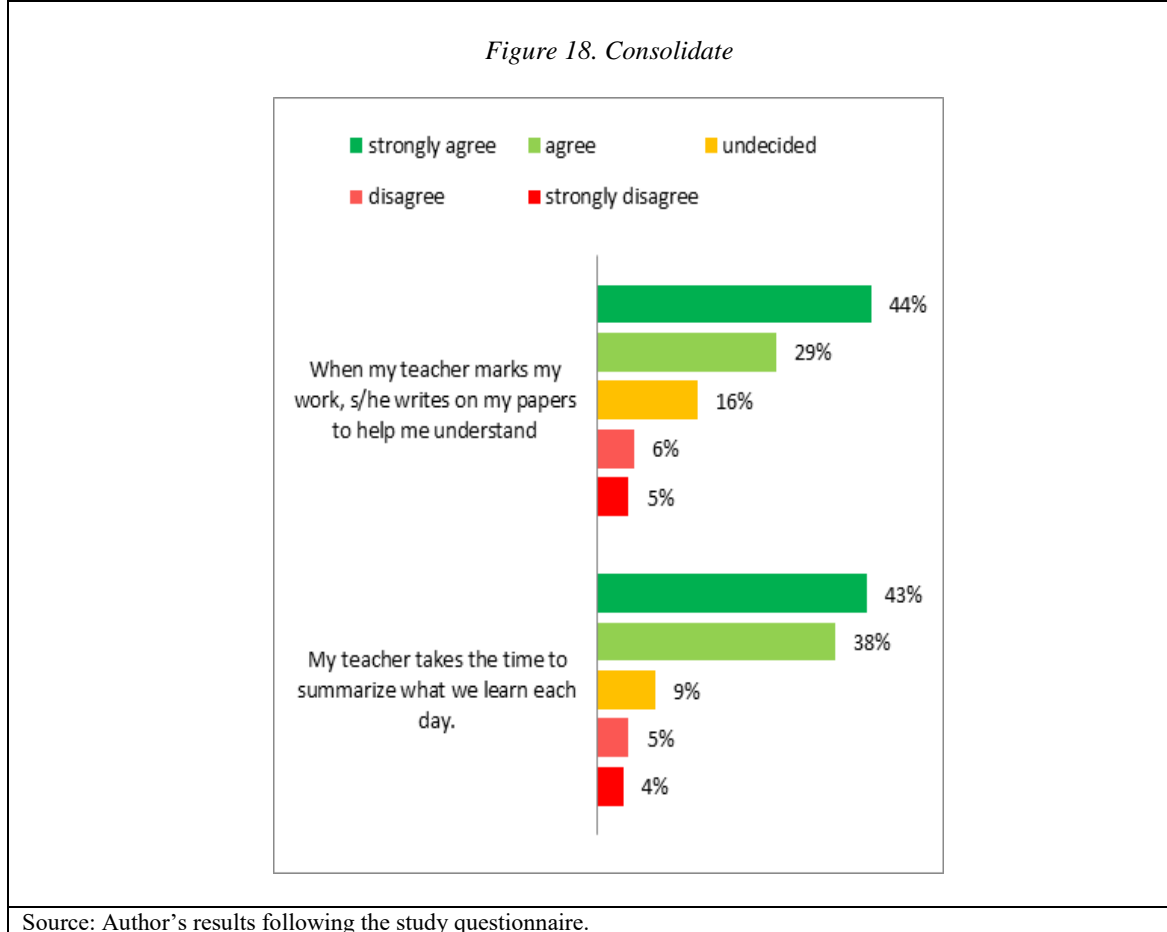
To understand student preferences and impressions for their class and homework, we used the concept of *Captivity (mean 3.73)*. From the graph, above, we can say that the majority of them (56%), think that homework helps them learn. Also, they think that homework and classwork are interesting, respectively with 35% and 39%.

Figure 16 and Figure 17



Sometimes students have thoughts and questions that they never express to their teachers. *Confer* (mean 3.44) block is used to measure the class environment that teachers create for every student and how comfort students feel in class. From the graph, it is noticeable that teachers have created a friendly environment which encourages students to share and explain their thoughts (all the question are above 50%). However, when it comes to students only 38% of them share their ideas. There seems to be some inconsistency in accordance with teachers' efforts to create a friendly environment and students' involvement in the classroom.

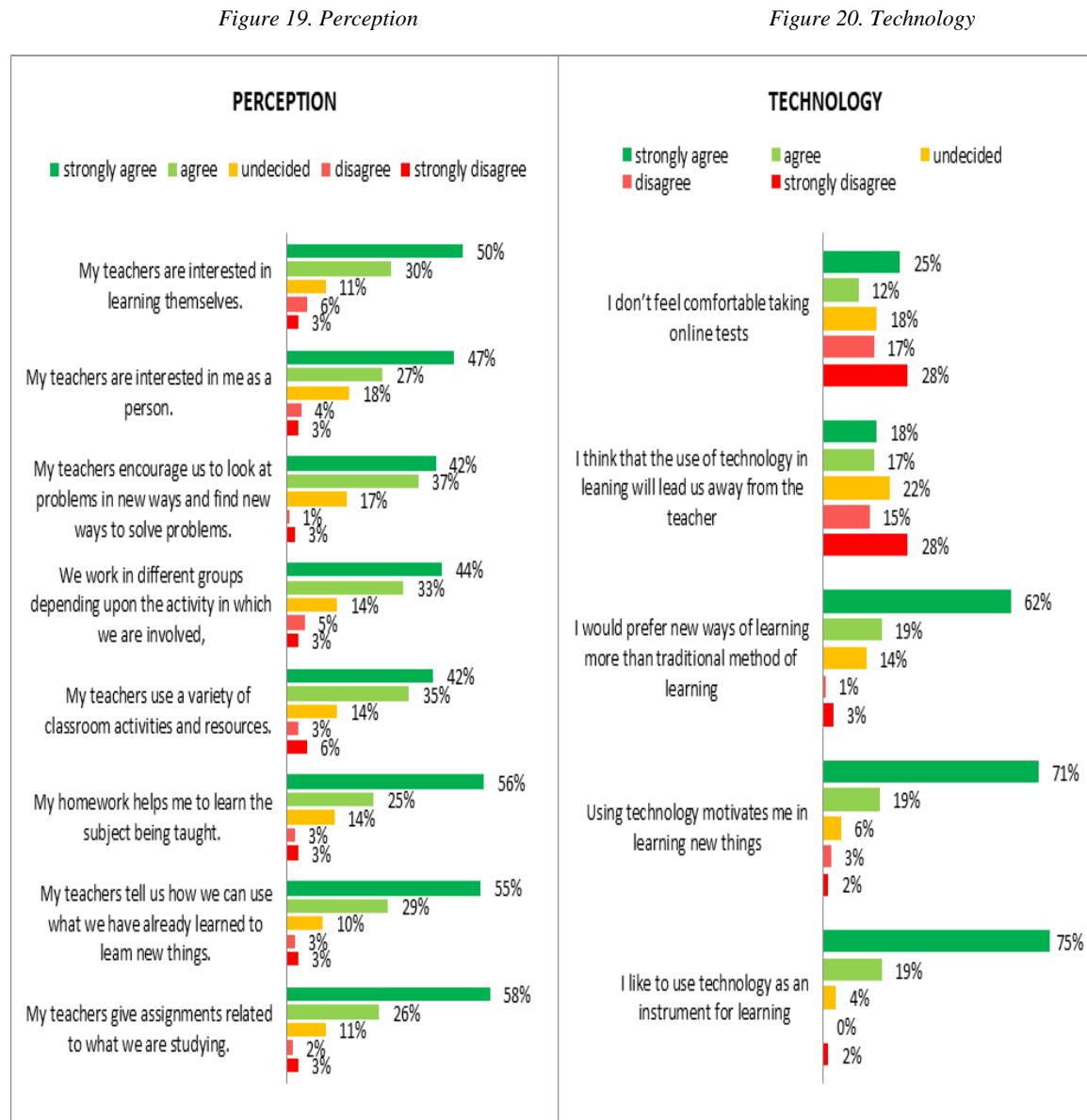
Figure 18. Consolidate



Usually a curriculum covers many topics and skills and sometimes is difficult to summarize what is more important for a student to learn. *Consolidate* (mean 4.06) construct measures teacher's ability to summarize and check the work done in class in order to make learning coherent. 43% of students answered that their teacher takes time to summarize what they have learned and 44% of them answer that teachers write notes in their paper when their mark students work to let them know their mistakes and how to understand and solve them.

To measure the overall *Perception* (men 4.18) of students to their teachers we use the *perception* block, which measures the interest of a teacher for their students, teachers' attitude to encouraging students to find new ways of problem solving and to use different activities in classroom. From the graph, above, we see a strongly agreement for every question, what indicates a good students' perceptions for their teachers. Students think that teachers, motivate them to think in different way, teachers use a variety of classroom activities (42%), and they give students assignments related with what they have study (58%).

Figure 19 and Figure 20



Source: Author's results following the study questionnaire.

Questions related with *Technology* (mean 3.85) are built to measure students' perception about integrating technology in their classroom. Students find technology as an instrument that they like to use for learning purposes (75% strongly agree) and as a tool which motivates them in learning new things (71%). When asked about their comfort in online testing, we perceive fluctuating responses, 25% of them strongly agree for online test and 28% of them strongly disagree.

Their fluctuating answers are also observed in the question related with teacher-student distance that may arise from the use of technology, 18% of them agree that the use of technology in learning will increase teacher-student distance and 28% strongly disagree. In asking to choose between new ways of learning and traditional methods of learning 62% choose the first one and only 3 % the second.

Conclusions

Understanding perceptions and attitudes of a focus group constructed by teachers and students and then generalizing the key findings for the entire education system is a difficult task, thus the extent of conclusions is limited. That being said, there is a high degree of homogeneity in behaviour of high school students and teachers around Albania with few outliers in every region.

Research shows that the success of technology use in the educational settings largely depends on teachers attitudes toward technology use (Albirini 2006). Through this questionnaire, we measured teachers' attitude toward technology use to better understand how teachers see technology use and how ready are they to implement this in their classroom. Knowing the lack of IT infrastructure in Albanian schools and the resistance to change, we expected moderate results. But as explained and analysed above, teachers are open and find the technology use as a necessary tool, which needs to be integrated in their classrooms.

The study shows that both teachers and students find the integration of technology in learning a necessity in improving the education quality, both in teaching and in learning. They perceive improvement in understanding of the classes, motivation and dedication, learning environment and critical thinking. Keeping in mind the vocational nature of these schools, technology seemed as a natural upgrade to their curricula and absolute requisite to the development of their skills.

Teachers find the use of technology in their work, enjoyable, stimulating and exciting, they are open and like to learn more about technology. Against the expectations of their conservatory approach towards teaching, they feel comfortable using technology and they do not want to avoid it. Furthermore, they think that the use of technology increases student involvement and motivation, makes students learn more and makes lessons more attractive, the only concern related with technology use in classroom is they fear that technology may increase the distance teacher-student and vice versa.

Technology is an important tool that helps them to better organize their work, and stimulates creativity among students. Teachers also see it as an instrument which will help them increase their productivity, learn more and improve the quality of their classrooms. They claim that students prefer learning from technology more than from teachers, so they are open to implement technology in their classes to make subjects matter more and increase the involvement, interactivity, motivation and learning for their students.

On the other hand, the students' learning environment has a big impact on their attitude and perception towards the integration of technology. Classes are learning oriented and students know what to learn as they think their success and well-being matter to their teachers. Students claim that their teachers create a challenging environment to encourage them to think out of box and work harder, a claim that seems to contradict conservative teaching methods used widely in Albania and their other claim emphasised in the above section that "don't like the way they learn in class and teachers don't have classroom in control all the time". However, the find technology as an instrument that they like to use for learning purposes and as a tool which motivates them in learning new things, as well as it stimulates the learning environment.

An important issue, was that some of the kids entering such schools are usually economically and socially challenged and academically the worst performers of the system. Have said this, the challenge with these kids is far more substantial than with normal high school children. On the first sight, such new initiatives, new devices and technologies would make them more willing to go to school and access good education, an opinion that proved into a fact during the observations.

The main fundamental issue was with teaching resources. Some subjects had bad and poor teaching materials that were provided by state agencies regulating vocational education, some other subjects had no material whatsoever. Those subjects that had books providing basics of theory were not associated with additional resources such as exercise or practice book, or even practical cases since such education has a strong practical orientation. Tourism and business branches required virtual libraries and glossaries, while ICT subjects required practical approaches since one cannot learn programming with paper and a pencil.

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MARTIN SERREQUI¹

PERSONNEL ECONOMICS IN DEVELOPING ECONOMIES: PERSPECTIVE OF THE ALBANIAN CONTEXT

Abstract

Personnel economics directs its focus at identifying and analyzing economic principles that form a cornerstone of human resource management strategies, and at scrutinizing the impact of several institutional and competitive environments on the effectiveness of such strategies. As a relatively new and developing field of study, it is making a breakthrough in traditional human resource management theory by using econometric and statistical methods, to study the monetary and non - monetary attributes that enhance worker performance and organizational productivity. There is certain ambiguity in the literature, which of the two attributes are the most effective in increasing workers productivity, but there still remains a considerable bias towards monetary attributes. Highlighting the growing importance of personnel economics, the purpose of this paper is to investigate the implications of the personnel economics theory in the Albanian labor market. The approach of the Albanian market is shown to be monetary and somehow in the prime steps of its development, and furthermore there is a difference in implementation among the agricultural, industrial and service sectors. Special emphasis is put on the naïve application of pay-for-performance practices and the need for further scholar enquiry in addressing variable pay schemes for some of the most sensitive sectors of the country's economy.

Keywords: Personnel economics, Albania, labor market, organizational productivity, performance pay

JEL Codes: J30, J40, M50

Introduction

Personnel economics has been described by most authors as the application of mathematical and economic concepts (E. P. Lazear & Oyer, 2012), and econometric and statistical methods (E. P. Lazear & Shaw, 2007) to different topics and questions raised within the human resources management sphere (E. P. Lazear & Oyer, 2012; E. P. Lazear & Shaw, 2007; E. Lazear, 2000). It entails both economic and social aspects concerning human capital management (E. P. Lazear & Oyer, 2012), ranging from inherently economic and quantifiable tools, such as: compensation strategies and systems (Backes-Gellner, Bessey, Pull, & Tuor, 2008; E. Lazear & Gibbs, 2007; E. P. Lazear & Oyer, 2012; E. Lazear, 2000), hiring and recruiting practices (E. P. Lazear & Shaw, 2007); to social issues that include norms, behavior, teamwork, empowerment, etc. (Backes-Gellner et al., 2008; E. P. Lazear & Shaw, 2007). Particularly, it directs its focus at identifying and analyzing underlying economic principles that affect human resource management (HRM) strategies, and at exploring the impact of several institutional and competitive environments on the use and effectiveness of such strategies (Backes-Gellner et al., 2008). Most research into personnel economics has focused on five aspects of employment relationships, further subdivided into two major categories: monetary and non-monetary job attributes. Altogether, those include: incentives, matching firms with workers, organization of the work, compensation, skill development (E. Lazear & Gibbs, 2007; E. P. Lazear & Oyer, 2012).

¹ Faculty of Economy, University of Tirana, Albania, martinserreqi@feut.edu.al.

Personnel economics and HRM: shifting and merging disciplines

Scientific quest into this field of study was consolidated by the mid-1990s (E. Lazear & Gibbs, 2007), and has rapidly grown thenceforth (Backes-Gellner, 2004; E. Lazear & Gibbs, 2007). Lazear & Shaw (2007) attribute the rapid and systematic changes in human resources practices to the emergence and growth of the personnel economics field that have taken place in the last quarter of a century. Among such changes, noticeable examples include: rising pay variance within and across occupations and firms (Autor, Katz, & Kearney, 2006), compensation shifting towards pay-for-performance, and the rise of teamwork prevalence.

Personnel economics derives most of its theoretical wealth from studies and developments in the field of human resources and HR management (Backes-Gellner et al., 2008; E. Lazear, 2016). Both disciplines share a common “ancestor”, which some authors have called “personnel management” (Aslam, Aslam, Ali, Habib, & Jabeen, 2013; Oswick & Grant, 1996). Personnel management and people management are sometimes used interchangeably (Georgiou, 2014). Personnel management blossomed in the decades succeeding World War II. Nevertheless, the Cold War division into market and planned economies provided for the emergence of different approaches to human capital management, exploitation and control.

Hereafter, a shift between planned economy-personnel management and market economy-human resource management became roughly visible. Nonetheless, the vagueness of this division has generated different opinions regarding the depth of the divergence between personnel management and human resource management. In essence, there are no major differences between HRM and personnel management as most observed dissimilarities are mostly a matter of approach and emphasis rather than essence (Armstrong, 2000; Georgiou, 2014). Personnel economics, per se, is a young sub-discipline of human resource management (Dilger, 2011). Whereas HRM is mostly concerned with personnel managerial issues in general, personnel economics is dedicated to the explanation of personnel management through econometric measures. Therefore, where HR managers use managerial lenses to explore human resource issues, personnel economics researchers use mathematical metrics to better understand latent mechanisms of personnel functioning.

Monetary attributes

Large corporations featuring consolidated hierarchical management structures, are characterized by discrete jumps in wages between hierarchical levels rather than incremental increases (E. P. Lazear & Shaw, 2007). Wages form a cornerstone of personnel economics’ theory, and thus, considerations regarding wage structure, wage theory, promotions and incentives are at the centerpiece of the field’s theoretical framework (B. E. P. Lazear, 2016; E. Lazear & Gibbs, 2007; E. P. Lazear & Shaw, 2007; E. Lazear, 2016; Osterman, 2011). Two main theories of wage-related promotion have been described in personnel economics’ literature. The first, known as standard human capital theory, is founded upon the assumption that wages are determined by skills (E. P. Lazear & Shaw, 2007), and therefore discrete and significant wage jumps associated to promotions in hierarchically-fixed management structures, are not supported by this theory. Nevertheless, according to (E. P. Lazear & Shaw, 2007), literature is full of comparable examples in which job promotion at the upper-executive levels is related to gargantuan salary increases. It is therefore likely that jobs themselves – and especially elevated management jobs – play a crucial role in determining the wage of the job-holder (E. Lazear & Gibbs, 2007; E. P. Lazear & Shaw, 2007).

Another basic consideration this theory thrives on, is that individuals are able to accumulate general and firm-specific human capital by working (Burdett & Coles, 2010). It is related to a common idea shared

by many labor economists, who view human capital as a dichotomized variable divided into general human capital (implying human capital generally increases productivity in all jobs) and firm-specific human capital (the worker increases his/her productivity only in one firm) (Burdett & Coles, 2010).

General theories of compensation suggest that output-based pay is more effectively used when what encompasses output is well-defined and its measures are well-established. On the other hand, input-based pay is more appropriate when jobs are relatively risky and output cannot be easily determined or observed (E. P. Lazear, 2003). Incentives form an intrinsic component of the compensation structure (E. P. Lazear & Shaw, 2007; E. P. Lazear, 2003; E. Lazear, 2016), and deciding on compensation structure from an incentive-based argument is relatively straightforward. According to (E. P. Lazear, 2003), if evaluators are able to concur on an appropriate metric of performance, then rewarding workers based on the established metric associates worker incentives to those of their “product”.

Compensation structure is mostly concerned with salary and other benefits. In most firms, workers are paid a basic salary, whereas in other firms bonuses and performance pay form a bigger portion of compensation (E. P. Lazear & Shaw, 2007). An important assumption of personnel economics presumes workers respond to incentives accordingly (B. E. P. Lazear, 2016; E. P. Lazear & Shaw, 2007; E. Lazear, 2000). This main presumption draws from theoretical considerations that paying on the basis of output will induce workers to increase their output generation (E. Lazear, 2000). Furthermore, many companies are faced with the challenge of choosing an appropriate performance pay scheme (E. Lazear, 2000).

The crucial concern here is to examine the choice of payment schemes and the effects they exercise upon profits and earnings (Booth & Frank, 1996; E. Lazear, 2000). Different options are generally considered in regards to payment scheme choices. According to (E. Lazear, 2000), pay scheme models are focused either on hourly wages, or on piece-rate wages. Nevertheless, questions regarding productivity and output performance are raised when both options are taken under consideration. Both types of pay schemes are related to some measure of worker output (B. E. P. Lazear, 2016).

Much of the debate in the field of compensation structure has focused on whether to use a piece-rate or an hourly-rate pay structure (B. E. P. Lazear, 2016; E. Lazear, 2000). Piece-rate pay places more general focus on productivity, being described as a form of motivational scheme (E. Lazear, 1999), whereas time-rate pay (or hourly pay) mostly revolves around quality. Both are regarded as forms of incentive schemes. Personnel economics is rather interested in answering two sets of questions regarding payment schemes organizations choose (Altmann et al., 2011; B. E. P. Lazear, 2016; E. Lazear, 1999): What are the factors that influence the choice between payment on input versus payment on output? Do workers respond to incentives as predicted by theoretical models? According to (E. Lazear, 1999) firms will respond to these questions in two steps. In the first step, the firm models worker’s behavioral response and thereafter it selects the parameters necessary to raise its profit. The second step is dependent upon the first as the firm chooses the most adequate parameters based on the labor supply response as predicted in the first phase.

Furthermore, despite piece-rate pay’s effect in strengthening productivity through increasing product quantity, the main concern with this compensation scheme regards quality. A trade-off between quantity and quality has been identified when piece-rate pay is selected (Gibbs, 2009; Heywood et al., 2013; E. P. Lazear & Oyer, 2012; E. P. Lazear, 1995). The quantity-quality trade-off fear is widespread in business and is generally thought to be worsened by the adverse effects incentive payments can have on workers, by rewarding quantity and overlooking quality (Heywood et al., 2013).

Lazear (1999) has illustrated with a model the effects time-rate and piece-rate pay will exercise upon workers. The theory indicates that if workers are offered hourly-based wages, working harder will

produce no additional value for workers, and thus no higher levels of efforts will be invested by them (employees) with everyone choosing to remain in point A. However, high-ability workers will chose to move to point B when they are offered piece-rate guarantee schedules, and only the least able will remain at point A. The theory generates three main implications: First, average effort will not decrease, on the contrary, as long as some workers will put forth enough effort to achieve the piece-rate range the average out put will nonetheless rise. Second, average work-force ability will increase because of increases associated to the ability of the most productive workers. Third, output variance will increase as well under a piece-rate system as workers' efforts' levels will become even more differentiated.

Non-monetary job attributes

Financial incentives are not the only job attributes that enhance worker performance and organizational productivity (E. P. Lazear & Shaw, 2007; E. Lazear, 2016). Attributes of job tasks and those of the work environment ultimately exercise influence and affect the well-being and job satisfaction of workers (Angrisani et al., 2015). Non-financial incentives is a broad term, applied in reference to benefits workers receive in their working environment, not expressed monetarily. (Ijaz & Khan, 2013) have defined elements such as: the promotion of employees, flexible time, level of autonomy, status, and involvement in decision-making as relevant non-financial incentives that affect employee satisfaction and final job performance. (E. P. Lazear & Shaw, 2007) argue that money, albeit being very important to workers, isn't everything they are looking for in a company. However, there is no specific definition that can be applied to non-monetary job attributes. They can be broadly defined as benefits workers receive that are not related to wage or other direct forms of monetary compensation.

Teamwork has increasingly become a feature of modern organizational life (Addison, Bryson, Teixeira, & Pahnke, 2011; Bloom & Reenen, 2010b; E. P. Lazear & Shaw, 2007). (E. P. Lazear & Shaw, 2007) argue that other firm policies, such as those regarding pay compression and variability, are major teamwork-enhancing forces, especially when workers in a company or sector exercise complementary functions. Moreover, a principal component of personnel economics' team theory emphasizes the importance of complementarity between skills of different workers (E. P. Lazear & Shaw, 2007). Skill variability and diversity enhances team productivity through the integration of several features of team interaction, responsible for contributing to value generation in teamwork.

The Albanian context

Personnel economics principles are not familiar to Albanian industries in general, and to businesses specifically. Most businesses pay employees "shredded" basic salaries – "shredded", as most pay is at times lower than the legal minimum. Endemic levels of corruption, low regulation enforcement, and widespread market informality, are major contributors to such aggravating circumstances. Albania sits at a puzzling conundrum of an under- and unenforced legal framework, political corruption, fiscal informality, underdeveloped financial system, high levels of youth unemployment, as well as volatile economic and political settings.

Short profile of the Albanian economy

Based on data compiled by the National Statistical Institute (INSTAT), major contributors to Albania's GDP are depicted in the table below.

Table 1. Major economic sectors' contribution to the national GDP (2017 est.)

Sector	GDP %
Agriculture, forestry and fisheries	22.6%
Industry	23.8%
Services	53.7%

Source: INSTAT.

It depicts broad categories of economic sectors contributing to the Albanian economy, comprising many industries. Henceforth, the Albanian economy is heavily dependent upon Agriculture, Services, and Industry, as broad classifications of different types of industries. These are the major contributors to the country's economic output.

The economy has kept growing, despite being “traumatized” by short periods of stagnation. Albania managed to weather the first waves of the global financial crisis of 2007-2009, but the negative effects of it caused a significant economic slowdown. Since 2014, Albania's economy has steadily improved and economic growth was projected at 3.8% in 2017. However, close trade, remittances, and banking sector close ties with Greece and Italy, make Albania vulnerable to spillover effects of possible debt crises and weak growth in the Eurozone economies.

Personnel economics in Albania

Are personnel economics principles and practices applied in Albanian industries and businesses? Revising the question, are they even applicable? Albania's market economy is relatively underdeveloped and several provisions of labor regulation remain, by large, unenforced in the private sector. Nevertheless, given suchlike circumstances, firms operating in different Albanian sectors and industries implement personnel economics practices. From monetary attributes, such as variable pay, to non-financial ones, such as teamwork; several Albanian firms, encompassing a multitude of sectors, apply instances of personnel economics theoretical provisions.

Regarding the theoretical implications of personnel economics, the monetary and non – monetary attributes seek to improve workers' productivity from within the firm. Labor productivity in Albania has always been a major issue. Dushku and Çami, (2017) in a study of labor productivity in Albania during 2006 – 2015 show that there is a total productivity growth of approximately 15% during these years, which largely responds to productivity growth within sectors and industries. This implies that changes in labor productivity within the sector are the main cause of fluctuations in total labor productivity versus the reallocation effect between sectors. This result indicates that the improvement may have largely been due to the establishment of a set of labor principles within the sector. Furthermore, it suggests the need for implementation of various methods proposed by the personnel economics theory, in order to increase workers' performance, hence labor productivity.

The case whether the monetary or non – monetary attributer have the most importance is rather simple. The labor cost survey (INSTAT, 2017a) shows that in 2016 the cost of wages and salaries constitutes in 83% of the labor cost and 97.3% together with the cost of employer's social contributions. Training costs and other expenses constitute in less than 1.6% (the remaining part are the taxes) of the total labor cost,

implying that there are insignificant non – monetary incentives used to enhance workers' performance. As the compensation structure is mostly composed by wage and salary, other benefits play a slight role. In most firms, workers are paid a basic wage, whereas bonuses and performance pay are recently introduced.

Agriculture

Structured incentives, provided by agriculture sector employers, have been shown to positively affect workers' efforts. Other benefits include cost certainty and cost reductions for the farmer, as well as higher pay and satisfaction. Some of the incentives that can be applied in agriculture include: piece-rate pay for pruning and picking, allowing workers to go home early with full pay, end-of-season bonus, quality production incentive, profit sharing, etc. (Billikopf, 2003).

Nonetheless, variable pay among farmers in Albania is not structured or formalized. It is remotely implemented, and only when employers wish so. Furthermore, there is a lack of combination between monetary and non-monetary incentives in Agriculture, Forestry and Fishing. Teamwork is a principal component of farming, pruning, picking, cultivating, distribution, and other important procedures. Nonetheless, teamwork and variable pay have not been integrated in Agriculture; they co-exist as separate parts of the job.

Industry

Construction is one of the most sensitive industries in regards to periods of market fluctuations and economic downturns (Paladugu, 2015). Generally, most construction firms in Albania provide strictly-stipulated, conservative base salaries. As such, employees' cash compensation, managed through discretionary bonus plans, becomes hypersensitive to fluctuations. Consequently, money leaks out of the employees' pockets. As economic crises elsewhere have demonstrated, such plans have paid out little or nothing during the recession years, even though in most cases employees were reluctant to leave what little security had remained.

In such circumstances, the Albania construction market, as a booming force for the national economy, needs more research for properly addressing variable pay and managing a structured incentives' program. Teamwork is another major component that forms a crucial part of the work in the sector, and as such, the need for an integration with incentives' programs is also imminent.

Textile manufacturing is a major contributor of financial wealth in Albania. Its contribution to the national GDP is significant and its share of market employment is, as well, relevant. "Primitive" forms of variable and piece-rate pay are applied in the industry by different employers, but the compensation scheme is far from structured and integrated.

Whereas teamwork is relevant in the field but not as sensitive a component, as in the Construction and Agriculture industries; variable pay, piece-rates, pay-for-performance, and bonuses are very important drivers of performance in the sector. As in the above-mentioned sectors, incentive pay structures and their integration with teamwork efforts are necessary for a further enhancement in productivity (Young Shin & Lee, 2013).

Services

Part of the services industry, Call Center firms have become increasingly influential in the Albanian market, especially from the late-2000s. Today, they account for most of the market's youth employment

and have moved beyond the traditional wage system. They are renowned implementers of pay-for-performance and financial incentives' systems. Teamwork is another essential component of personnel structuring in these firms.

Generally, most Call Centers pay employees basic salaries, which are in turn supplemented by (mostly financial) bonuses. Bonuses are collected by employees based on the number of sales and the nature of the products or packages they sell. With consideration to such market dynamics, these firms are heavily dependent upon variable pay and incentives, but little to nothing has been done to study the sector's pay structure.

Conclusions

As evidenced by examples brought above, a common issue that stems from the rest is the need for comprehensive academic quest in the field of compensation structure for firms operating in the Albanian market. Despite most businesses managing compensation systems beyond the traditional "basic wage" compensation, there have been no structured studies to explore issues related to the management of incentive schemes, variable pay effects, and pay-for-performance systems. As the latter is coupled with the important role the discussed sectors play in the Albanian employment market and the national economy in general, addressing the need for further scientific enquiry in the field becomes more relevant. Academia stands at the forefront of good governance, informed policies and innovation, and Albanian companies need scientifically sound solutions to increase productivity and competitiveness.

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ANA KEKEZI¹

COOL MEDIA APPROACH TO ENHANCE DOMESTIC TOURISM IN DEVELOPING COUNTRIES (ALBANIA)

Abstract

Tourism sector has become lately a key sector for the Albanian economy. Promotion and marketing are identified as main pillars to tourism sector. Protected Areas as a tourism destination is a new concept to Albanian citizens and stakeholders given isolation of these areas during communism regime. On the other hand the promotion of Protected Areas to enhance tourism is also a new practice followed by government and stakeholders, during the last decade only. A crucial phenomena of the present decade reshaping the world, is the worldwide accessibility to the internet. New media is increasing immensely its usage and is gaining significant ground each year toward traditional media. This study will bring light on how new media influence and impacts the promotion of PAs in Albania as tourism destinations, as researchers have called for further studies in developing countries on this field of study.

Keywords: domestic tourism, promotion, new media marketing, national parks, word of mouth, influencers, online media, social media, protected areas, virtual communication

JEL Codes: L82, M3, Z32, Z33

1. Introduction

Tourism in Albania is set a key priority sector by the Albanian Government, given the crucial direct impact tourism gave to the Albanian economy on the recent years. Albanian Government (September 2017) proclaimed as the main direction the urge of tourism as an important economic and development source. The main goal set is a sustainable tourism in 365 days. One of the five pillars in the tourism chapter of the Albanian Government program 2017-2021 is the marketing and promotion through digital and social media at regional and international level. Which clearly validate, that new media is identified a real potential for the promotion of this prior sector of the Albanian economy, but also identifies that the domestic tourism is not considered yet a priority.

IMF (2017) reports that though Albania has benefitted from the recent tourism boom in the region, the outlook for exports remains challenging. On the other hand, European Commission reports that the services sector development contributes 70% of the gross value added. The Commission identifies tourism sector of Albania in particular with significant development potential but is impeded by a number of challenges linked to the lack of skills of tourism professionals, low accessibility of tourism services, the absence of a sustainable natural and cultural offer, etc. The Commission suggests that the measure to standardize the tourism sector if implemented successfully could be a driving factor for competitiveness.

In a mapping done this study, all Ministries in the Republic of Albania do have a public page in Facebook and Twitter, and all 61 Municipalities in the country to have a public page in Facebook. The tools of new media in the country are rapidly embraced even from the central and local government, public sector and their high ranking representatives.

¹ European University of Tirana, Albania, ana.kekezi@gmail.com.

McCann Tirana (2018)² reports for this research, that ad budget share of digital media at the national level has increased from 3% in 2012 to approximately 12 % in 2017, by their agency estimations based on the monitoring data.

1.1. The significant contribution to the economy

The tourism is one of the key contributors on the Albanian economy in several directions as growth of GDP, new work places, exports and investments and relative contributor on other sectors. World Travel and Tourism Council (WTTC) forecasts that Albania in a decade (2018 – 2028) can be able to turn tourism as the main contributor of the GDP. Since 2014, Albania's economy has steadily improved and economic growth reached 3.8% in 2017³. The trade balance improved thanks to the good performance of tourism. In economic development for 2016 the World Bank reports that Albania's economy expanded 3.4% in 2016, supported by robust domestic demand. Net exports contributed 2.1 % points, driven by tourism services exports⁴ that expanded significantly in 2016 from a relatively low base and is expected to continue performing well.

WTTC (2018) reports the data of Travel and Tourism contribution for 2017. The direct contribution of Travel & Tourism to GDP was 8.5% of total and is forecast 9.3% by 2028. While the total contribution of Travel & Tourism to GDP was 26.2% of GDP in 2017 and is forecast to be by 28.9% of GDP in 2028. In 2017 Travel & Tourism directly supported 93,500 jobs (7.7% of total employment) and is expected to 111,000 jobs (8.8% of total employment) in 2028. While total contribution 24.1% of total employment (291,500 jobs). This is expected to rise to 344,000 jobs in 2028 (27.3% of total). Visitor exports generated 54.2% of total exports in 2017 and is expected to go in 2028, 62.2% of total. Travel & Tourism investment in 2017 was 7.5% of total investment and forecasts to go in 2028, 8.2% of total. The tourism law has been going through many changes during the period of post-communism. The actual Tourism Law, set as the main scope the promotion of Albania, as a touristic destination for foreigner and domestic visitors, relying on the development of a sustainable tourism.⁵ Cvetkoska & Barišić (2017) findings show that the most efficient country in the period of six years (from 2010 to 2015) was Albania among all countries of Balkans studied in their research. The government have been "aggressive" during recent years in promoting tourism regionally and internationally, and the statistics show that this strategy has offered a good result. The UNWTO⁶ Secretary-General, Taleb Rifai, December 2014 states "Albania is truly blessed with spectacular natural and cultural heritage, the backbone of its tourism sector, a sector which has shown impressive growth over recent years"

Yet tourism strategy path in country seems to be unclear and unsafe. "From 1990 up to date many strategies proposed by international donors have been refused or not approved, and the ones that have been considered were partially implemented due to lack of capacities, expertise or willing" said a representative officer of one of the biggest international donors in country for tourism sector. She emphasized that the shifts government does from a strategy to a new one, costs money and extent lack of trust among stakeholders. A high ranking representative in the Ministry of Tourism and Environment (MTE) recognize the situation and claim that due to the new tourism law entered in force December 2017, a new strategy is need.

²McCann Tirana, Advertising Agency, part of McCann Group global network, contributed to this research with their data and statistics.

³The World Fact Book – CIA [accessed March 2018].

⁴World Bank "Albania-Snapshot-Fall2017" <http://pubdocs.worldbank.org/en/805501507748388634/Albania-Snapshot-Fall2017.pdf>.

⁵Tourism Law, Republic of Albania [accessed February 2018] http://www.qbz.gov.al/Ligje.pdf/turizem/Ligj_93-2015_27072015_%20perditesuar_%202017.pdf.

⁶ World Tourism Organization (UNWTO), UN agency.

The bank industry in country see a high perspective on the sector. ‘Tourism has high potential, but and a masterplan for the development of the tourism would give access to a structured development’ suggests Blanc, Frederic (2017)⁷. EU Delegation in Albania (2018) also seek a Master Plan for sustainable tourism in country. EU Ambassador in Albania Romana Vlahutin, underlined that "a national Tourism Master Plan is a must".⁸

“The government have no official strategy for tourism yet. This means lack a clear vision for the sustainable development of sector. There can’t be marketing and promotion, if there is no strategy” stated Rajmonda Lajthia, Executive Director of ATOA⁹

1.2. A shadowy domestic tourism

*At the heart of tourism is the excitement of new cultural experiences*¹⁰

The statistics from the National Institute of Statistics (INSTAT) report that 5.1 million foreign visitors visited our country in 2017, + 8.1 % more tourists than the previous year (2016). Monitor.al (2018) reports that the boom of 2017 from foreigner visitors and tourist may not be stable and on the other hand WTTC (2017) has defined Albania as a high risk country, as it has a poor infrastructure network in quality and quantity, a threat for the development and sustainability of tourism.

On MTE’s Draft Strategy of Tourism 2018 – 2022 is identified that aiming a sustainable development in this sector leads the strategy. Though a clear direction for domestic tourism was not identified.

WTTC (2018) reports that domestic travel spending generated 24.6% of direct Travel & Tourism GDP in 2017 compared with 75.4% for visitor exports. On the other hand, Bank of Albania (2018) reports that 1.3 billion euro have been the spending of Albanians outside country, +11% increase comparing year 2016. INSTAT (Institute of Statistics, Republic of Albania), reports that 5.18 million Albanian citizens have traveled outside country, +12% comparing 2016. Figure 1 identifies a low interest of domestic visitors in cultural attractions.

⁷ Blanc, Frederic, CEO, Societe Generale Albania Bank, Interview for Monitor.al Magazine.

⁸ Round table “Support to Tourism companies in Albania, organizer European Bank for Reconstruction and Development (EBRD).

⁹ Rajmonda Lajthia, Executive Director, Albanian Tour Operator Association (ATOA), Interview with Ana Kekezi, March 2018, Tirana.

¹⁰ Theunissen, P., Mersham, G., & Rahman, K. (2010). Chapter 5: The New Media, Cultural Transformation.

Figure 1. Visitors in cultural attractions 2014- November 2017

Visitors	2014	2015	2016	Nov. 2017	2017 vs 2014
Domestic	198,536	148,669	185878	202557	2%
Foreigners	156,446	238,187	282157	349390	123%
Total	354,982	386,856	468035	551947	55%

Source: Ministry of Culture, Republic of Albania, Jan 2018.

The Albania Tour Operators & Travel Agencies Association (ATOA)¹¹ reports that given the non-secure path the Albanian tourism is having on attracting the foreigner visitors, a proper mid-term strategy is urgent need, to attract Albanian citizens to domestic tourism. They claim that the Bank of Albania reports should be taken in consideration and proper evaluation is need, to understand how much money can stay in-home¹².

ATOA concerns are connected mainly to a low seasonality of Albanian tourism, even though a high touristic potential for 365 days tourism and the potential of niche segments, to encourage and attract domestic visitors. RisiAlbania (2014 p. 4) has identified why Albania agonizes from a short seasonality. In their finding country suffers from a numerous limitations such as poor or absence of infrastructure, absence of information for market, poor customer service, and absence of the set standards, poor marketing and a touristic product that often does not meet the expectations of the customers. There is no survey on domestic tourism and efforts are needed to improve the business register (EU, 2016)¹³. GIZ (2016) reports that 98% of tourists who have been interviewed; have responded positively to the expectations of accommodation in Albanian Alps, but in their research is not defined either they are foreign or domestic tourists. While on the survey done for this study 64% of the respondents of Q1 answered that accommodation quality vs price is the main reason, they do not prefer to choose domestic tourism.

On the Q2 survey participants on this research, 16 out of 16 responded that focus on domestic tourism should be immediate from the government and public sector and 11 out of 16 responded that government has worked far better with the promotion on foreign tourist's target.

Leonard Maci said that domestic tourism will be on National Agency of Tourism (NAT) focus, but he acknowledged that yet NAT have not worked with a proper strategy or plan on this direction. He claimed that the efforts and tools of NAT during (2013 – 2017) have been focused to reach the market beyond borders, as a good economic potential.

1.3. Internet fast penetration

During the last decade Albania has witnessed an outstanding level of access to internet. Albanian Institute of Media (AIM, 2015) identifies that the real growth of internet in Albania started after the privatization of ALBtelecom Company in 2007. The Albanian Government vision on access to internet has been a primary goal since 2010. Two main priorities set (2010) "Internet for all" and "Albania in the Internet age".

¹² Scan TV ,Studio Interview with Kliton Gërzhani, Chairman ATOA (March 2018).

¹³ European Commission, Albania 2016 Report.

Electronic and Postal Communications Authority (AKEP) on the Annual Report of 2010 estimates that the number of families that have broadband internet access until the end of 2010 is about 110 thousand or about 13.7% of families, while it is estimated to be over 10.000 business subscribers. Based on these data, the number of broadband lines per 100 inhabitants is about 3.7%, compared to 2.5% that was by the end of 2009. AKEP(2018)¹⁴ reports that the number of active users Broadband in internet from mobile networks on (Oct-Dec 2017) was around 2 million, with an increase of +20.4 % with same period in 2016 and an increase of approximately +124% vs. 2014. The number of customers Broadband accessed in Internet from fix line networks was around 295.000 having an increase of +10.6% with same period of 2016 and approximately +42% comparing with 2014. This data show the fast penetration of internet, especially the increase from mobile networks. Internetworldstats.com (2018) reports for Albania that 1.932.024 or 66.4% of population are internet users and 1.400.000 are Facebook users¹⁵

1.4. Protected Areas in Albania

*We aim to have the Albanian tourism in a real development industry (Blendi Klosi 2017)*¹⁶

A protected area (PA) is a clearly defined geographical space, recognized, dedicated and managed, through legal or other effective means, to achieve the long term conservation of nature with associated ecosystem services and cultural values. (IUCN Definition 2008)

Albania a small sized country is very rich in biological diversity. The tremendous diversity of ecosystems and habitats supports about 3,200 species of vascular plants, 2,350 species of non-vascular plants, and 15,600 species of invertebrates and vertebrates, many of which are threatened at the global or European level (Ministry of Environment, *Annual Report 2015* Republic of Albania).

On the first Forestry Law, Republic of Albania (1923), there are clear elements that define protection and special for various species and fauna and for controlled hunting. National Agency of Environment (NAE) (2014) reports that in 1940 Kune-Vain, Lezhë was proclaimed hunting reserve and as per the IUCN definition, this one may be identified as the very first PA in Albania.

The legal, political, economic and social contexts for tourism in and around protected areas vary widely across the globe, yet there are many common elements and a diversity of experiences that can enrich the understanding of those involved (IUCN 2018).

The first law of Protected Areas in Republic of Albania¹⁷ entered in force in 2002 and was reviewed in 2017¹⁸ to align with the EU directives and allow to reach the goal of 17% PAs of the country territory by 2020.

The National Agency for Protected Areas (NAPA)¹⁹ manages the national system of protected areas in Albania, whereas day-to-day management is delegated to 12 Regional Administrations for Protected Areas (RAPA)

As per the categories set internationally by IUCN (International Union for Conservation of Nature), in country there are actually 798 PAs extended in a total of 460,060 ha or 4.600 km² of the country territory.

¹⁴ <https://www.akep.al> [accessed March, April 2018].

¹⁵ internetworldstats.com, statistics reported for June 2017.

¹⁶ Minister of Tourism and Environment, Mr. Blendi Klosi, Press Statement, 06 October 2017.

¹⁷ <http://www.qbz.gov.al/doc.jsp?doc=docs/Ligj%20Nr%208906%20Dat%C3%AB%2006-06-2002.htm>.

¹⁸ Law 81/2017 http://www.qbz.gov.al/botime/fletore_zyrtare/2017/PDF-2017/116-2017.pdf.

¹⁹ The Agency was established by Act of Council of Ministers , February 2015.

Figure 2. Protected areas in Albania, Year 2017

Category	Description	No.
I	Restricted areas	2
II	National Park	15
III	Natural Monument or Feature	750
IV	Habitat/Species Management Area	22
V	Protected Landscape/ Seascape	5
VI	Protected area with sustainable use of natural resources	4
		798

Source: National Agency of Protected Areas (NAPA).

NAPA reports that Albania has recently made significant progress in expanding the network of PAs from 5.2% of the country's territory in 2005 to 16.02% of the country's territory in 2017. The majority of them have been designated in the category nature monument (750), but National Parks do cover approximately 210,501 ha or 46% of the total.

Stynes (1997) suggests that economic impact is part of a group of analyses that can be used to evaluate tourism in PAs (other analyses include: fiscal impact analysis, financial analysis, demand analysis, benefit cost analysis, feasibility study and environmental impact assessment). In this study, such factor is not taken in consideration given the primary aim of the study and on the other hand the gaps PAs face in this perspective. The official data of MTE provided for this research show that 6.000 euro are the PAs incomes generated for year 2015 and only 48.000 euro for year 2017. Considering the visitor statistics of NAPA, there is a discordance between data and money generated. "PAs in Albania are facing many challenges and none of them have ticketing system, except National Park of Butrint, protected by UNESCO" stressed a high ranking official of MTE.

Natura 2000 (2016)²⁰ on the assessment conducted has identified tourism as a potential risk for Albanian PAs. In their research infrastructure development for tourism purpose have been identified as a threat in 27 protected areas (50%), though at a low level. Threats from recreational activities and tourism were reported for 31 protected areas in Albania (76%).

1.5. Marketing strategies for the PAs as Tourism Destination

NAPA since it was established on 2015 is missing a promotion and marketing strategy for PAs as tourism destinations, a high ranking official confirms.

Leonard Maci, Director of Marketing, National Agency of Tourism(NAT)²¹ said that on the promotion and marketing strategies to regional and international markets, PAs have been promoted as a competitive advantage due to a unique experience, the wilderness, virgin landscapes, flora and fauna richness they offer. Rajmonda Lajthia, ATOA²² also confirms that tour operators never avoid PAs on their touristic guides, even on daily ones.

²⁰ Natura 2000 is the largest coordinated network of protected sites in the world. www.natura.al.

²¹ Leonard Maci, Marketing Director, National Agency of Tourism (NAT), Interview with Ana Kekezi March 2018, Tirana.

Villa Jose (2018) argues that the marketing industry has been focused — and somewhat obsessed — with digital for the better part of the last decade. The discussion and insights offered in the segmentation sections of the report, highlight the importance of using a robust segmentation strategy in order to understand visitors and potential visitors and the experiences they see (Reid 2008). “We do not have yet a marketing and promotion strategy short-term or middle-term one. The actual communication plans applied by NAPA, do not rely on a segmentation strategy or any previous research done for this purpose” said Denisa Xhoga, Communication Specialist, NAPA²³.

Reid (2008) proposes that information promoting national parks is disseminated by a wide range of organizations, including protected area agencies, visitor information centers, tour operators, state tourism organizations, regional tourism organizations and corporate businesses.

NAPA has clearly identified as main target the domestic visitors. The NAPA statistics show that 2/3 of the total are domestic visitors and 1/3 are foreigners. The Agency has supported the raising awareness and promotion and in two main directions (i)Media communication and promotion and (ii) extensive collaboration with local communities of the PAs. (NAPA, Annual report 2017). NAPA reports that on 2015 there were not any information center or infopoints accesable. “Only promotion and marketing can make domestic visitors attracted to Albanian tourism. The potential our country is huge, but unfortunately albanians are not awared yet of this potential.” said Fation Plaku²⁴.

NAPA statistics reports (see Figure 3) a boom of visitors in PAs sites. NAPA reports that for 2017 statistic 62.8% are of daily visitors and the rest accomodates at least one night. The most visited category by 50% of visitors is Category II, national parks.

Figure 3. Number of Visitors in PAs

Visitors	2015	Jan-Sept 2017
Domestic Visitors	359.937	1.489.815
Foreign Visitors	112.080	552.101
Total	471.967	2.041.916

Source: National Agency of Protected Areas (NAPA).

Denisa Xhoga claims that the rangers at national level are offering free guides to visitors as a promotional tool to make them come back and spread their experience. “NAPA have no annual bugdet for pure advertising on traditional media or new media. These are considered up to date as free of charge promotional tools” said Denisa.

Rajmonda Lajthia, ATOA claims that the tour operators, as main stakeholder on the sector have been clear with their demands and their proposals for the development of PAs as tourism destinations, but they remain doubtful if government implement them on the strategy.

²³ Denisa Xhoga, Communication Specialist, National Agency of Protected Areas (NAPA), Interview with Ana Kekezi, March 2018, Tirana.

²⁴ Fation Plaku, Travel & Tourism Influencer, Interview with Ana Kekezi, March 2018, Tirana.

1.6. A “cool, many to many media” for the promotion of PAs

Digital transformation is a journey, not a one off-event. McLuhan (1964) is well known for the postulate “the medium is the message”. He proposes that the media, not the content that they carry, should be the focus of study. McLuhan (1964) identified two types of media: “hot” media and “cool” media. As per the definition the author proposes, cool media, a more hearing focus, are the ones that need high participation from users, due to their low definition (the receiver/user must fill in missing information). Conversely, hot media, a more visual focus, are low in audience involvement due to their high resolution or definition. Where new media stands? The researchers suggest that new media in the way it engages it’s audiences to fill the gaps and create a fuller picture, may be defined with no doubt “cool” media.

New Media is new concept in marketing theory and developed after 1991 the www was presented to the world.²⁵ Nowadays industry seeks to gain from the advantages of two-way dialogue with consumers primarily through the Internet. Manovich, Lev (2002) proposes new media in 8 perspectives, arguing that new media is born in early 1920, differently from now, where information and technology are the basement with base on Web 2.0 technology. Törenli, (2005: 159) suggests that one of the main characteristics of new media, the flows of information can be possible between user groups or individual users. Piontek, Dorota (2014) proposes that new media, especially the Internet, can be defined as a channel of communication in terms of technology or as a platform of resources, co-created by all users. Piontek reveals that in new media there are three types of them: institutional (similar to the traditional model), social - the different social actors that through access to new media have become independent from institutional media agency, and individuals - each user of new media, who has the need to actively co-create them. Crosbie, Vin (2002) described on his study three different kinds of communication media. (i) Interpersonal media as “one to one”, (ii) Mass media as “one to many”, and (iii) New Media as Individuation Media or “many to many”.

This paper uses the term “new media” with the meaning which is widely accepted among researcher. Social media maybe the most well-known tool of new media is accepted by researchers to have two main concepts: Web 2.0 and user site (Rouse, 2013). Web 2.0 applications support the creation of informal users' networks facilitating the flow of ideas and knowledge by allowing the efficient generation, dissemination, sharing and editing of informational content (Constantinides & Fountain, 2008). User generated content can be defined as information that users provide or share on a website. The information might be a photo, video, blog or discussion forum post, poll response or comment made through a social media web (Constantinides, E., & Fountain, S. J. (2008). There are still many ongoing debates and discussions regarding social media’s universal definition; as social media has been transforming and merging into the evolving development of New Media (Solis 2010).

“Lately, the marketers in Albania are mostly focused on social media comparing other tools of new media” said Elvin Civici, Online Account Manager²⁶. Nevila Popa, tourism expert, emphasizes the usage of online tools, social media networks, blogs etc are determinative for Albanian tourism; not only as destination, but also for the foreign investments²⁷. Rajmonda Lajthia stress the importance of social media in the promotion of domestic tourism. She claims that social media gain weight during last years, as per the high time consuming spent in social platforms. She identifies that most of tour operators in country have shifted from traditional media in online marketing, having a positive outcome. McCann Agency report that for 2017 Albanians consumed 143 minutes/day on social media and 91 minutes/day on online news portals.

²⁵ The World Wide Web was invented by **Tim Berners-Lee** and **Robert Cailliau** in 1990.

²⁶ Elvin Civici, Online Account Manager, McCann Tirana, Interview with Ana Kekezi February 2018, Tirana.

²⁷ Interview for Monitor.al, January 2018 [accessed February 2018 <http://www.monitor.al/turizmi-ne-2018-ne-trend-pozitiv-problem-infrastruktura-2/>].

2. Methodology

2.1. Methods applied

This research adopts a mixed method approach to achieving its objectives. For this research are used primary and secondary data. Piontek, Dorota (2014) suggest that in researching new media, all methods and techniques developed for examining old media, are useful, especially the quantitative and qualitative content analysis. The insights that generated from the qualitative data collected in field were highly beneficial to the process of data analysis and interpretation. Triangulating the findings provided evidence for the study to make sense of phenomenon under study (Mathison 1988, p. 15)

Data Collection Tools

Primary data are significant information to lead this research; and secondary data have been employed as valuable especially the governmental and public sector statistics, reports and data.

The following methods of primary data were employed to carry out the research:

- a) Observation (conducted in sites of 2 PAs Divjak-Karavasta National Park, Fier RAPA & Shebenik-Jabllanicë, Elbasan RAPA in natural settings, February 2018)
- b) Semi-structured interviews with 14 participants (9 employees/civil servants in MTE, NTA, NAPA and RAPAs; 1 official of UNDP Albania, Denisa Xhoga, communication specialist, NAPA; Leonard Maci, Director of Marketing, NAT; Rajmonda Lajthia, Executive Director of ATOA; Elvin Civici, Online Account Manager, McCann Tirana)
- c) In deep interviews with 3 participants (Ardian Koci, Director, RAPA of Fier; Fatmir Brazhda Former Director, RAPA of Elbasan; Fation Plaku, Photographer, travel and tourism Blogger and Influencer)
- d) Online Surveys; Q1 (109 citizen respondents); Q2 (16 respondents employee/civil servants in central and local government bodies directly related to tourism sector); Q3 (6 participants; 3webdesigners 3 online content experts), Q4 (6 participants Influencers & Bloggers living in Tirana)
- e) Observation of Internet sites (webportals, blogs, Facebook, Twitter, Instagram, forums, photo and video sharing) (similar to netnography proposed by Kozinets, R. but simpler)
- f) Official data and documents for this research by MTE, NAPA and NAT

2.2. Challenges & limitations

Confidentiality – Ethical considerations are critical in research. Many of participants in interviews required to protect their identity in this research. Working on central and local government make them uncomfortable to reveal their identity. This barrier may present difficulties to other researchers to understand in deep the primary data.

Time Barrier - The surveys conducted for this research were questionnaires' sent electronically in random citizens, assuming them as potential domestic visitors. The sample of 109 respondents is considered a limited size and the Q1 maybe would have given a better result, if it would be conducted with visitors in PA's sites.

Data analyses – No data measurements or any research at national level was identified to support this study.

3. Cool media impact on Albanian protected areas

3.1. Not military zones: Protected areas as touristic destinations

“Protected areas before ‘90s have been considered by state as isolated areas. Recently the government, stakeholders and community in country agreed, that access to them will assure sustainability and development to the economy and bring boost to the domestic tourism” Lefter, Koka (2016)²⁸.

PAs in Albania during communism regime and even in post-communism (1990-2005) have been considered as isolated areas, to be protected and conserved. “The mentality and actions of stakeholders on development and sustainability in PAs begun changing during the last decade” a high ranking official of MTE said. Recently the decision makers and stakeholders in PAs have been proactive to develop strategies toward a sustainable path for PAs along with access to tourism. Articles suggests that in developing countries the new conceptualization of tourism which incorporates sustainability and community participation as dominant elements is favorable to an alternative theoretical framework of development. A high ranking NAPA’s staff claims that to fight the mentality of open access to PAs as tourism destinations have been quite a challenge to NAPA staff themselves. It is clear that promotion through all stakeholders of hospitality and tourism can give to PAs, the opportunity to grow and raise awareness on the unique experience they do offer for visitors. MTE (2018:9) in the draft national strategy reports that the product of ecotourism (where PAs are included) has increased with 10%-20% /year.

Fatmir Brazhda²⁹ emphasizes that in the early promotional activities (2013), their moto used to be “A protected area is not a military zone”. “Protected areas were perceived few years ago, by administration staff itself, as isolated perimeters to guard” said Ardian Koci, Director of Elbasan RAPA 2018³⁰).

Destination image

Destination image has been identified as a crucial aspect of tourism, recreation and leisure (Hall, Croy & Walker 2003; Croy 2004). The greater the exposure to images of the destination, the greater the familiarity and complexity of the image held (Smith & Croy 2005; Croy & Wheeler 2007). The greater the complexity of the image, the more knowledge of the specific decision-making factors (Croy & Wheeler 2007). The formation of a positive perception is determined by evaluative components of image. In this process, from awareness, to availability, through to deciding on an evoked set, destination image is the deciding factor (Lawson & Baud-Bovy 1977; Richardson & Crompton 1988).

Given the increased reliance of tourism providers and destinations on their online reputation (Marchiori & Cantoni, 2011), it is critical for them to not only understand what drives social media promotion or effectively manage it. On Q1 survey 109 out of 109 respondents confirm that image is important getting their attention and curiosity on PAs, they haven’t visited before. 109 out of 109 on Q1 visit PA sites at least 2 times in year. 84% of respondents of Q1 confirm they do further searching on internet on the site, if the image attracts them. Ardian Koci, sharing his experience said that at the very beginning the team staff were profane on social media use, and image was not their focus; but the experience improved their skills. Image is identifies as a key element on MTE Draft Strategy of sustainable Tourism 2018-2022.

²⁸ Former Minister of Environment, Republic of Albania (2013-2017) media statement, OraNews TV Interview 2016.

²⁹ Fatmir Brazhda, Former Director, RAPA of Elbasan, incl Shebenik-Jabllanic National Park, Interview with Ana Kekezi, 2018, Librazhd.

³⁰ Ardian Koci, Director, RAPA of Fier, incl. the National Park of Divjaka, Interview with Ana Kekezi, 2018, Divjakë.

Stakeholders and decision makers are working with no data or researches. On Q2 11 out of 16 responded that PAs are preferred most by foreign tourist, while the official statistics of NAPA opposes this. On the other hand 50.5% participants of Q1 respond that have little knowledge on the touristic potential of domestic PAs, but only 17 out of 109 have responded they are not satisfied or are little satisfied with what PAs offer.

3.2. The many to many media need for domestic tourism

“One click in your profiles, photos, videos or share from the coast, Alps, Tirana, Berat, Gjirokastra, nature, culinary or history of Albania has the a much higher impact than dozens of fairs, official meetings, or money spent for promotion. This is a good thing that you can do to Albania, to Albanian tourism.” (Blendi, Klosi, 2017)³¹

‘The world narrated’ is a different world to ‘the world depicted and displayed’. (Kress, 2003:2) *The world told* is a different world to *the world shown*. Kress (2003:2) considers that the effects of the move to the screen, as the major medium of communication and argues that this will produce far-reaching shifts in relations of power, and not just in the sphere of communication. Andreasen (2003) reminds us that social marketing met with resistance when it first emerged, blinking in to the academic world like a new-born baby. Researchers suggest that ‘Social marketers’ turning the power of marketing to social good, thereby compensating for its deficiencies with better outcomes (e.g. Kotler, Levy, Andreasen). It is fact that state is orienting their vision and strategies toward new media, as a key tool to promote Albanian tourism, but how and what will be the process and roadmap seems unclear yet. 109 out of 109 respondents of Q1 consider new media tools (social media and newsportals) as very important to get information on tourism. Denisa Xhoga admits that NAPA set as a main promotional goal the focus on new media tools, considering them as a “free” tool. 10 out of 16 official of Q2 see the use of new media tools as extremely important for the promotion of domestic tourism.

Albania is facing a rapid digitization of media channels. The annual ad spending data show that Out-of-home (OOH) advertising is “disappearing” and same way the print media. Elvin Civici, McCann Tirana claims that for advertisers print media as traditional media has “dead”, while the biggest journals in country merely sells an average of 1.000 copies /day. Journal print shifted their battleground in online. Albanian Media Institute (2015) suggests that Albanian news media evaluate the role of the social media as an important means to boost the audience through the referral traffic deriving from these media.

Constantinides, E., & Fountain, S. J. (2008) present the consumers with a whole array of options in searching for value products and services and finding exactly what they need and want with minimum effort, in line with the current customer desire for personalization, individual approach and empowerment. There is evidence that customer reviews posted in different forums or online communities, Web blogs and podcasts are much more powerful as marketing tools than expert product reviews (Gillin, 2007); the influence of blogs and podcasts is increasing because of the fast expansion of the audience and contributors.

16 out of 16 participants of Q2 respond that to promote their work they use mostly new media tools (social networks and online news portals). 78% of respondents of Q1 confirm that when deciding to visit a destination, they get information from social media, while 94.4% are daily users of social media with at least 1 hour access in them.

³¹Blendi Klosi, Minister of Tourism & Environment, Speech during launching event of ODA, January 2018 <http://www.javanews.al/shpallet-nisma-per-turizmin-rjet-blogeresh-per-promovimin-e-shqiperise/>.

3.3. The cool media impact on Albanian PAs promotion

Manovich (2001) on his research on new media states that the identity of media has changed even more dramatically than that of the computer. “The statistics confirm that new media is growing its popularity in Albania and some of its components are becoming part of the mainstream” said Elvin Civici.

The latest articles and studies from the sector report an increasing attention globally on new media tools impact in Protected Areas promotion. Sinanaj, Shkelqim (2016) on his findings on a research conducted for tourism in Vlora Region, Albania suggests that the tourist’s loyalty is impacted by the elements and the platforms of social media. The role of social media in tourism is particularly significant and the impacts of social media use by tourists, destinations and tourism providers are manifold (Gretzel, 2018; Sigala & Gretzel, 2018). Fatmir Brazhda, former Director of Elbasan RAPA claim that + 90% of visitors that accessed the park, tag, post, comment in their social media accounts their experience in Shebenik-Jabllanicë National Park.

The researchers propose that new media require a shift in marketing thinking – consumers have become highly active partners, serving as customers as well as producers and retailers, being strongly connected with a network of other consumers (Thorsten, 2010).

Whether it be the traditional editor with a viewership, a micro-influencer with 5 thousand followers or a celebrity/politician with over 1 million followers, each individual has the ability to shape the industry by sharing their own opinions amongst their communities.

AIM (2015) refers that the very first social platforms Albanians were introduced was Facebook, which is actually a leading social platform in country (Socialbakers.com)

11 out of 16 of Q2 survey participants would highly recommend mostly new media tools (social networks and online news portals) to promote PAs. None of them recommended traditional media tools such as newspapers and outdoor.

Websites and social media accounts of tourism entities The emergence of new digital channels has allowed stakeholders to build their own “media” through which they can reach their final audience directly. Owned media, is simply defined as those channels the stakeholders own and control content for (including social, blog, etc.) has acted as a pull medium to achieve this goal and ultimately transform consumers into brand advocates and loyalists. A major challenge for Web site designers involves the functional complexity of the Web site’s content. De Jong & Wu (2018) propose that functional complexity is considered when communication is intended to serve more than one goal or address more than one stakeholder group simultaneously.

The official online channels of central government bodies (MTE, NAPA and NAT) are mapped and analyzed in this study and confronted with the opinion of 6 professionals, 3 web designers and 3 online content experts (Q3).

6 out of 6 participants of Q3 evaluated the websites of MTE (turizmi.gov.al) and NAT as poor. Image is skipped and not considered as a key element. They do identify that the 2 official websites of NAT ([http://wp.akt.gov.al/](http://wp.akt.gov.al) and <http://albania.al>) are not appealing, have poor content. From the observation these two websites exclude the domestic or foreign visitors as one is in English language only and the other in Albanian language only. The [http://wp.akt.gov.al/](http://wp.akt.gov.al) is considered for all 6 participants as unprofessional. On the contrary, they claim that social media accounts (Facebook, Instagram, YouTube and Twitter) are professional and appealing. While NAPA’s website [http://akzm.gov.al/](http://akzm.gov.al) is identified from 6 out to 6 participants as an accurate website, but they would suggest much focus on image with

higher quality photos, to motivate and appeal better a potential visitor. NAPA Facebook page as the only social account of NAPA is also evaluated as accurate but yet missing strong appeal, as often it loses focus from image.

12 RAPAs at national level do have websites and on social media Facebook accounts only. The websites of RAPA are only informative, not aiming promotion and marketing through this tool. The mapping of Facebook pages of 12 RAPAs found a correlation between the most visited PAs and the activity in their Facebook Pages.

The observation on Facebook and Instagram pages of actual Minister of Tourism and Environment (September 2017 – January 2018)³² and former Minister of Environment³³ show that posts related to PAs or nature in general, seems more likable to the virtual community getting a higher number of likes, comments and shares, comparing other posts.

Web portals as “purely online media” Articles suggest that alternative media was presented in the begging of 21th century from the journalists who decided to become independent from traditional media and provide to public a diverse perspective of the information from another point of view . In Albania this is a trend embraced by many well-known journalists in country as Armand Shkullaku & Andi Bushati with Lapsi.al , Rudina Xhunga with Dritare.net, Blendi Fevziu with Opinion.al, Ylli Rakipi with Tpz.al, Mentor Nazarko with Konica.al , Mustafa Nano with Respublica.al, Enkel Demi with 27.al and others. At present, the corps of “purely online media” is being shaped as one of the most dynamic in the Albanian online space, leading to increasingly frequent novelties and developments (Albanian Media Institute, 2015:18)

Denisa Xhoga and Elvin Civici claim that articles on purely online media have high impact and more credibility than paid online ad. Denisa Xhoga stress the fact that NAPA has focused her work with journalists mainly on web portals, as virtual community tends to engage and share the information. Webportals are considered for 109 out of 109 of Q1 respondents, as the fastest way to get information.. Whether 56.9% of them confirm that when deciding to visit a destination they get information from online news media. On the other hand, 16 out of 16 respondents of Q2 consider internet as the highest influencer to their work.

Word of Mouth in online context Word-of-mouth represents a highly influential information source for potential visitors and is therefore of great interest to tourism marketing professionals.

Kotler & Keller (2007) suggests that word of mouth Communication (WOM) is a communication process for the provision of advice either individually or in groups for a product or service that aims to provide personal information. Communication by WOM is considered very effective in expediting the process of marketing and be able to provide benefits to the organization. Other researchers confirm that customers prefer to seek advices from the people who have already visited that particular destination than merely trusting the conventional advertisements from the suppliers. (Crompton, 1992; Decrop & Snelders, 2005; Gligorijevic & Luck, 2012; Hyde & Laesser, 2009; Park, Lee & Han, 2007; Seddighi & Theocharous, 2002; Woodside & Lysonski, 1989). Ring, & Dolnicar (2016) on their research found that tourists share both verbal and visual word-of-mouth content. They do suggest that stakeholders have the possibility to leverage word-of-mouth.

87.7% of respondents of Q1 trust more a recommended destination by a friend/relative rather than from other forms. 100% of them consider the online comments, posts and suggestions of their

³² <https://www.facebook.com/klosiblendi/> ; https://www.instagram.com/blendi_klosi/.

³³ <https://www.facebook.com/lefterkokapolitikan/>.

friends/familiars equal trustable as the traditional WOM. Ardian Koci claimed that +70% of domestic visitors in Divjaka National Park have been referred by a relative or friend, or a person they do follow in social media. Particularly as surveys indicate that word-of-mouth generally plays an important part in influencing visitation to national parks (Eagles & McCool 2002). 77 out of 109 respondents of Q1 used word-of-mouth sources to make destination choices.

Wiki Platforms & Blogosphere Wiki platforms are new media tool. Albanian language has its own space and as reported by Wikipedia. The community consists of 102.780 registered users, 296 of them have contributed with at least an editing during the last months. The information on Albanian language, for Albanian tourism and protected areas from observation seem extremely limited comparing with the one offered in English language. Also many bio links provided in Albanian language section of Wikipedia are not functional. 85.2% of the respondents of Q1 use Wikipedia as 2nd source of search, after Google. Another finding was that 55.6% of respondents of Q1 were using even social media (such as Facebook, Instagram or YouTube) as searching vehicles for tourism destinations. The largest number of blogs in Albania are created and hosted by WordPress and fewer Blogspot platform. But it is hard to track in Albania bloggers or any blog for traveling, hospitality and tourism. Albanian bloggers and influencers are mostly focused on culinary and fashion.

Bloggers and influencers Social media also support the emergence of influencers that occupy a middle ground between consumers and commercial users (Kozinets et al., 2010). eMarketer 2018, reports that for Influencers, Instagram is the clear-cut favorite and nearly 80% consider it their primary platform for collaborations. 6 out of 6 participants of Q4 members of ODA's network claimed for this study that they prefer better Instagram, while advertisers they collaborate prefer to use both Instagram and Facebook. None of them had a Twitter account. Only 9.1% of respondents of Q1 confirmed that they were not noticing or ignoring the destination of a post done/tagged by a VIP/public person (they fan/like and follow in social media).

Albanian ODA³⁴ - the bloggers' network A 2015 survey by Tomoson³⁵ emphasizes how influencer marketing can be highly lucrative for those brands who engage in it. Businesses are making \$6.50 for every \$1 spent on influencer marketing. Most businesses get solid results from influencer marketing, with just the bottom 18% failing to generate any revenue. 59% of marketers intend to increase their influencer marketing budget in the next year.

ODA – the Albanian blogger's network was an initiative of MTE launched in January 2018, to promote Albanian tourism. Over 200 Albanian representatives of art, culture, business from Albania and beyond borders are part of this network. "Jehoje dhe ti"³⁶ was a 60 second promoting video of the Albanian tourism that was posted firstly on the Minister Blendi Klosi social accounts, and after posted or shared by 200 bloggers. This video became rapidly a viral one. Marketers suggest that influencer marketing is about data, not celebrity deals. "We have not done yet any measurement or analyze on "Jehoje dhe ti" promotional video" acknowledged a civil servant staff of NAT.

Own media

"It's a pity Albanians overestimate what neighbors offer. It's matter of culture and mentality. The Albanians does not grow since childhood with the love for nature, as

³⁴ ODA word in Albanian language means room.

³⁵ Survey 2015 "Influencer Marketing Study" [Accessed 10 March 2018 <https://blog.tomoson.com/influencer-marketing-study>].

³⁶ Jehoje dhe ti - Echo even You – a direct appeal to the users, to make share the video, Video launched on January 2018.

other citizens worldwide do. I am surprised that most Albanians have discovered their country lately, mainly from social media” Fation Plaku, 2018

Influencer marketing in travel and tourism builds on the importance of word-of-mouth in the travel context (Litvin, Goldsmith & Pan, 2008). Studies suggest that in the age of social media, consumers move from being fans to being producers of promotional content for brands, and from occasional endorsers to micro-celebrity-seeking social media influencers (Hearn & Schoenhoff, 2016).

Fation Plaku, whom passion for nature, have “transformed” him on photographer, a blogger and mostly identified as a key Influencer, while sharing his thoughts for this research admitted that he desired to make people visit the beauty of Albania nature, but he didn’t know how. New media tool or “his own media” as Fation refers to his website and social media accounts (Facebook, Instagram, YouTube and Twitter) opened a real window to him. He started to share and shoot his unique moments for fun and from many years now he is doing it professional way. He also confirms that his favorite and most followed channel is Instagram.

Fation claims that this is the first time he is interviewed/approached for study purpose. Same claimed even the 6 participants of Q4. Researchers admit that there is a lack of research that investigates the travel and tourism influencer marketing phenomenon Gretzel, U. (2018).

3.4. PAs success stories; cheers to cool media

Social media allow destinations to contact visitors at relatively low cost and higher levels of efficiency that can be achieved with more traditional communication tools (Kaplan and Haenlein 2010). McCombs and Shaw (1972) suggest that those topics which are the most frequently covered by the media are seen as the most important. The crossing of secondary data and statistics of NAPA “defined” the 2 success stories researched for this study (see figure 4 and 5).

As the outcome of the increasing influence of tourism, natural and protected area management is evolving from one primarily focused around onsite management and conservation, to one that more broadly encompasses a greater range of holistic recreation and tourism experiences. In dealing with this evolution, national parks and protected area managers are now required to balance onsite interpretation activities with marketing and demand management activities. (Reid, Mike 2008). Natura2000 Albania (June 2016) in their assessment findings emphasize that protected area managers complained, that they are often not informed about or involved in research activities, and that researchers do not address their management priorities and needs. In the assessment is also reported, that in some protected areas in country, research has not been conducted for a long time. IUCN reveals that the continuing and dramatic increase in both international and domestic travel poses significant opportunities for managers of the globe over 100,000 protected areas.

Figure 4. Visitors in Shebenik-Jabllanicë National Park

Year	2015	2017
Visitors	400	13.000

Source: RAPA of Elbasan.

Figure 5. Visitors in Divjak-Karavasta National Park

Year	2015	2017
Visitors	1.500	383.000

Source: RAPA of Fier.

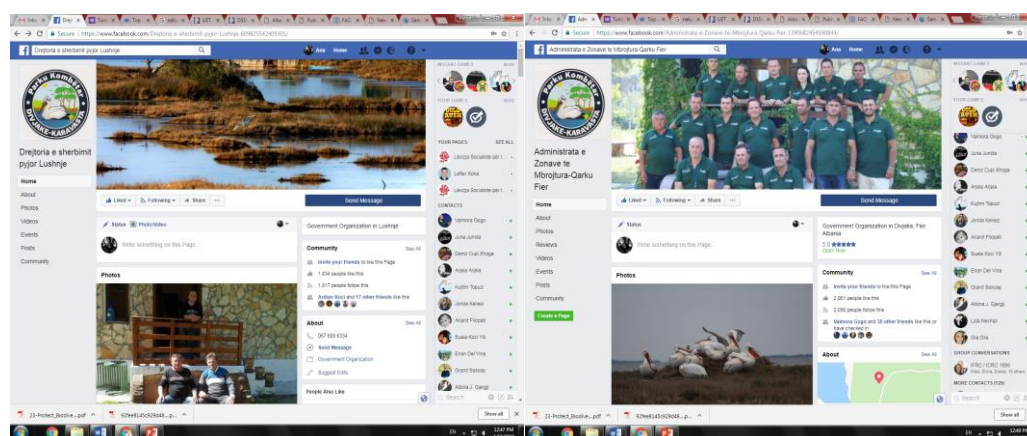
Divjakë-Karavasta National Park – The shelter of Curly Pelicans

Divjakë-Karavasta National Park, managed by RAPA of Fier is well known, as the Shelter of Curly Pelicans (Dalmatian Pelican). 97 out of 109 respondents of Q1 identified this PA with the colonies of curly pelican and 100 of them have visited it at least once.

On the internet mapping (online portals, TV chronicles and social media posts) done for this PA found that many journalists, government high ranking officials and public personalities, contribute the success of the Shelters of Pelicans to the passion and dedication of Ardian Koçi, Director, RAPA of Fier.

Ardian, managing RAPA of Fier for 5 years is a profound passionate, eager to attract visitors. He states that he found Facebook, as the only way to have visitors in park. On 2013 the agency of PAs was not established yet by law and PAs were managed under the sector of forestry. “In 2013 I was appointed Director of Regional Directorate of Forestry of Fier. Few visitors were coming” said Ardian. He said that the decision to open a Facebook page (see figure 6, left) was the best step ever took. “People were annoyed from tagging, but I didn’t gave up” confirms Ardian.

Figure 6. Left Drejtoria e shërbimit Pyjor, Fier (created 2013); Right RAPA of Fier (created 2015)



Source: Facebook, Screenshot 2018.

Statcounter Global Stats (2018) report that, Facebook leads with 93.4%, followed by YouTube with 1.64% for April 2017- March 2018 period, social media in Albania. Ardian claim that the National Park was not visited at least once, even by citizens that live next to Divjaka. He identified Facebook as the

only free of charge tool he had in power, to raise awareness of the park and make people visit the lagoon. The page he opened back time in 2013 is still active, and with the establishing of NAPA by law 2015, Ardian activated a new page (see figure 6, right). Ardian claims that it was Facebook that attracted the journalists and reporters to promote the lagoon and raised interest in tour operators.

Healya and Wilson (2015) propose that host hospitality social media experts suggest that engagement on social media improves customer service and brand awareness, but they cannot validate if it influences buying behavior. Ardian claim that behavior of visitors has radically changed. “The domestic visitors’ main attraction during 2013- 2014 was culinary, now we can clearly identify that this trend changed for good. The culinary have altered as an extension, while main motivation and hours spent from domestic visitors are dedicated to lagoon and other areas of the Park” confirmed Ardian. He aims that the park be perceived by domestic tourists as a brand.

Shebenik-Jabllanicë National Park – The biggest national park

“Shebenik-Jabllanicë National Park³⁷, managed by RAPA of Elbasan is a new discovery to key stakeholders; media, citizens and tour operators” claims Fatmir Brazhda, Former Director, RAPA of Elbasan. The park is known in online media, as the biggest national park in country, but yet not clearly identified by potential visitors. 76 out of 109 respondents of Q1 have heard of the park, and only 22 out of 109 have visited it.

Shebenik-Jabllanicë during 2013 was on a critical stage of brand awareness, given the fact that it was a brand new National Park. “The role of media have been vital to make the introduction of our Park. On early stages, we started with a Facebook page (2013) and after that focused on local media and community” state Fatmir. In the Facebook page mapping of this park³⁸, it shows that the authority of influencers is adopted as a tool to promote the PA. Denisa Xhoga confirmed that national TV and newspaper journalists/reporters never heard of Shebenik-Jabllanicë, when she joined NAPA in 2015. Fatmir claims that social media is crucial to attract potential visitors, but success on delivering the experience in the Park is considered decisive that visitors go back or return “Shebenik-Jabllanicë ambassadors”.

4. Results and discussions

Zeng & Geristen 2014 call for future research into social media in tourism and in developing countries suggesting that this may provide productive research environments. This study gave some important findings for impact of new media tools in protected areas and specifically Natural Parks as tourism destination in Albania as a developing country, where PAs in country have been lately recognized by stakeholders as a high potential for tourism sector.

Findings of this study opposes the finding of Gover & Kumar 2007 in global rank where they identified that the role of internet was less important than was expected. In this study internet and new media tools are suggested as key players to promote domestic tourism in PAs but also to get and share information. Another finding is that protected areas can leverage their owned media channels to speak directly to their fan base. Word of mouth in online context, have been a promoter and amplifier to spread the message and raise brand awareness of PAs in potential domestic visitors and tourists. The influencers can be lucrative to PAs (destination image) - when it's done correctly and when proper measurements are done. New media is important to Albanian citizens for getting information and having a decision on their next destination

³⁷ In 2008 declared by law National Park.

³⁸ <https://www.facebook.com/ShebenikJablanicaNationalPark/>.

Use modern and digital promoting tactics to enhance the domestic tourism toward protected areas is one of the main recommendation. New media tools are suggested also given the fact that tourism is a cluster very influenced by new trends. New media tools are advice, also as cost effective ones. As they are swimming in rapid change environment, therefore new media marketing needs a strategy and a continuous and persistent update. It should be noted that many departmental websites are quite general and do not necessarily focus on promoting particular parks but are rather a functions tool to access the department. This often makes them difficult to navigate and not consumer friendly.

The study identified as well the existing barriers in the tourism sector, which should be resolved by active involvement of different stakeholders. Effective marketing strategies may foster competitiveness of Albanian tourism to domestic tourists. This study suggests that protected areas and specifically national parks who have more potential for accommodation units and recreation activities creation, need to become knowledgeable about marketing strategies and tools, and be competitive both from a product as well as a communication perspective. Another suggestion is that perceptions of the brand and value of PAs as tourism destinations strongly relate with the promotion on new media tools.

In the literature review by Hawthorne (2014), only 25% organizations measure in detail the influences social media content marketing. This study suggests that in Albania none of the governmental or public sector has done any measurement on this context. For promotion and marketing strategies on domestic tourism is important to know the needs, desires and expectations of domestic visitors, therefore researches and deep analyses are highly recommend to lead to better results and understanding. Another recommendation as other researchers found is that a tailor-made social media marketing approach targeting specific market segments would be critical to attract potential tourists in PAs (Zeng & Geristen 2014)

In conclusion the new media is proposed as tool that might help to critically impact on the competitiveness of protected areas as tourism destinations.

The research highlights the need for further studies into the impact new media have on impacting the domestic tourism and experience of different communication tools. It is significant to encourage investigation about the positive impact of social media marketing on the development aspects of a sustainable tourism. Further research is needed to integrate and complete the analysis with various methodologies, to deepen the impact of the new media in tourism cluster in developing countries and more focused in National Parks as protected areas.

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SAULET ALPYSBAYEVA¹

CORPUS-BASED TEXT AND DISCOURSE ANALYSIS ON TOLERANCE

Abstract

This paper explores the data on ‘tolerance’ based on Corpus of Contemporary American English (COCA) quantitatively and qualitatively. For this aim, we plan to identify the frequency depending on various genres and year. Besides, we will define theme-rheme structures in the clauses on “tolerance” extracted from various text types. Thematic structures regulates the clause as a message making it communicative (Halliday, 1997, p.37). The use of corpora approach is actual for its objectivity, replicability and specialized character. It permits carrying large-scale quantitative studies and diversity of texts allows text analysis (Aijmer, & Stenström, 2004, p.4-5). Corpus of Contemporary American English (COCA) has 560 million words of text (20 million words each year 1990-2017), is widely used and related to other corpora, which can be personalized. As for the data retrieval, we extract and interpret the figures ensuring their frequency by type, section, and year. Next, we identify thematic structures of the sentences where the ‘tolerance’ encounter. This research conveys quantitative and qualitative analysis on the use of ‘tolerance’ that promote the further study of tolerance as an object of text and discourse analysis.

Keywords: Corpora, text, discourse analysis, theme-rheme, tolerance

JEL Codes: Z00, Z13

1. Introduction: Tolerance

Tolerance has been the object of many interests for its complex nature. Historically, this phenomenon has been actual in multiple societies. These discussions were related to religious, philosophical and aesthetical norms and canons. Their interpretations has been justified for the universality of its characteristics, on the one hand, and unsupported for their one-sidedness or ambiguity, on the other. In fact, the widespread debate on the phenomenon of tolerance can be explained by its contextual interpretation. That is tolerance is “a set of ideas and attitudes”, which are formed based on cultural values and beliefs. These ideas and attitudes give a reason to act, i.e. to tolerate something (Alpysbayeva, 2018). To give an example, we have clear-cut conceptions between good and bad, so the same applies to one differentiating tolerance from intolerance depending on one’s cultural and social differences. Once the intolerance is concerned, we feel the urge to mention a word on the “Paradox of Tolerance”, which are related to either its controversial character or selective interpretations (Popper, 1945 as cited in as cited in Zijan Ding, 2014, pp.1-12). Since, in the article we want to analyze the tolerance, quantitatively and secondly grammatically, the discussion on understanding the tolerance at this point will suffice, as we move toward our goal.

Today, in the field of text and discourse analysis, current steps and work are related with managing large-scale data, which incorporate the computer and software uses for parsing or breaking down into necessary elements.

In this study, we have chosen Corpora of Contemporary American English (COCA) as a source of data for our analysis. The actuality of tolerance can be supported by 7008 encounters in 28 different sections (COCA, 2018) which will be later discussed in detail.

¹Kazakh University of International Relations and World Languages named after Ablai Khan, Kazakhstan, saulet25@gmail.com.

2. Text and discourse analysis

Many linguistic studies are dedicated to the study of a kind of text today, because of the change of perspectives toward language study, in general. For, the text is considered to be more than just a structural constructions. As far as text and discourse analysis is concerned, our lead-in is obviously enough connected with text which is dealt under both text and discourse analysis. Although there is a distinction between text analysis, studying written or print materials, and discourse analysis, looking at oral texts, the 'text' lies under the interest of both types of analysis. Surely, there are differences along with alignment in the approaches applied for text and discourse analysis. These approaches vary the definitions of the text. Thus, it is quite important to define what text and discourse analysis are and what aspects they focus on.

From the preceding studies, we notice the consideration of the text as a "product" and not as a "process" (Brown & Yule, 1983, p.24, as cited in Aijimer & Stenström, 2004, p.2). One of the names associated with the foundation of text linguistics is T.van Dijk (1972). Insufficiency of sentential descriptions induced this tradition of text linguistics and followed by Halliday's approach. In particular, the latter drove the attention on cohesion and coherence (1994) for the correlation of structural patterns with meaning.

Throughout the history, society has played a pivotal role in shaping human minds, which direct human acts. The social impact reflect in the conversation of different forms in everyday life. Approaching the text from Critical Discourse Analysis has been of much importance for its social intention. The representatives of CDA are R. Wodak, N.Fairclough and T.van Dijk. T.van Dijk (2003) supports the importance of multidisciplinary approach on the study of discourse, which CDA, in its turn, can preassume. This is because the prevalence of the linguistic consideration on talk and text, which disregard social aspects, make CDA be germane and actual. Regarding T.van Dijk's stand on the validity of CDA, it is backed up with its regard the social interaction and social structure rather than descriptive analysis of discourse structures. CDA focusing on "social power abuse, dominance, and inequality" in society, enlarge the scope of general discourse analysis (p.352-371). Relying on Fairclough and Wodak's (1997, pp.271-80, as cited in Dijk, 2003) tenets of CDA we distinguish the following:

"CDA address social problems
Power relations are discursive
Discourse constitute society and culture
Discourse does ideological work
Discourse is historical
The link between text and society is mediated
Discourse analysis is interpretative and explanatory
Discourse is a form of social action", (p.353).

Zellig Harris (1950, as cited in as cited in Aijimer & Stenström, 2004) was interested in the "formal patterns within the text", the importance of which was later reconsidered due to the contextual nature of text. The "context" is an environment or a setup, where whatsoever sentence functions and make sense. Thereby, the discourse regards the aspect of context that incorporates a great deal of factors and information beyond the strings. Studies on discourse starting from monologue, spoken interaction, conversational analysis continues to a more structured, classroom discourse. Latter type is to be as highest units of discourse (Sinclair & Coulthard, 1975). These all varieties taken together diversify and extend the scope of discourse analysis, which on the other hand, impede putting line between the areas and clarifying the proper terminology for it.

Moving toward the new trends of text and discourse analysis, the use of corpora is pertinent to discuss at this point. As an effective tool, corpora enable text linguistics and facilitate its extensive scope for obtaining quantitative data. Corpora is advantageous as it can provide objective and reasonable evidence, which are extracted from different genres and years. Also, the analyzed data can be reconsidered and replicated for further analysis (Aijmer & Stenström, 2004). Although the range of studies on corpus-based approach show the relevance of all aspects of the text(s) concerned, there is little work on integrating both qualitative and quantitative research results. In fact, the studies on corpora divide into those studying the distribution and functions of linguistic features and internal organization of texts (Biber & et.al., 2007).

Given that sentence was the main focus for traditional grammar, new approaches in linguistics applied texts to explain grammatical phenomena. These trends demonstrate that text linguistics benefitted from previous theories and methods on the analysis of sentence. Speaking of grammatical structures, long-term interest in text linguistics is connected, with the question on how the text is united within. In Hasan's (1994) study, cohesion and other text constructions are discussed, which is developed further with the "systematic functional grammar" of Martin (2003). Words and phrases are the elements that realize cohesion in text and among texts. The importance of text cohesion, Stubbs (2003) underline not simply the "use of variations on typical collocations", but the "stringing together and overlapping of phrasal units" (p.306-307). According to Martin (2003), it is pertinent to model texts for its contextual localization and observe those resources that set and compose the text. In Martin's regard, discourses semantics (identification, negotiation, conjunction, and ideation) and patterns of interaction were of great emphasis. His focus on these cohesive structures and its contextual disposition let us consider the factors from all communication' participants (p.35-53).

The features of discourse that are free of grammar explanation, which are in fact, let the receiver of the text to grasp those cohesive structures properly. These language clues of discourse are connectors and markers bearing merely interactive nature for its use in spoken discourse. Among them are anyway, *I reckon, I feel, you know* and other examples that have diverse functions from changing a topic to getting attention. Here we can discuss the Shiffrin's (2003) position on discourse markers as "sequentially dependent elements" that compose "talk" in its process of realization. Her discourse model integrate several "planes" such as a "participation framework", a "information state", an "ideational structure", "action structure", and "exchange structure". The main point of these "planes" is that they help to integrate "action" and "ideas" of the speaker. These further revealed interrelation of "local" (utterances) and "global" (beyond sentence) aspects (p.57). Other aspect of discourse analysis is related with extra linguistic features of communication. Deictic links including gestural, referential and textual functions have been distinguished. In addition, contrastive studies of discourse analysis seem to be promising for the inclusion of at least two languages at a time. Studies relating the analysis of the cohesive structures and information organization are of great importance. This is because different language use diverse ways of organizing the known "theme" and the new "rheme", which can be structured with various grammatical patterns as well. Our goal, other than eliciting the figures on the use of tolerance, is to observe these message organization.

Another interest lies in the study of metaphors which display a wide range of challenges. They have been studied at sentential level. The difficulties arise in regard with their cognitive functioning and proper interpretation.

3. Corpus-based approach

From our brief prelude on the use of corpora and validity for current studies update preceding approaches and methodology of text and discourse analysis. Storing a big amount of information on computers has

led to the creation of corpora. These huge collection of various texts have been of great use for analyzing language from different perspectives. Whereas the variety and the boundaries of corpora are enlarging due to ongoing studies, and their formation and development, there are a number of corpora that can be representative, and worth of mentioning at this point. Among them are British National Corpus, the Cobuild Corpus and the Bank of English, London-Lund Corpus of Spoken English (LLC), the Santa Barbara Corpus of American English, the Bergen Corpus of London teenage language (COLT), the Michigan Corpus of Academic Spoken English (MICASE), American National Corpus, Bank of English, Brown Corpus, International Corpus of English, Oxford English Corpus, Scottish Corpus of Texts and Speech, Corpus of Contemporary American English (COCA), and many other. Their creation and application has been peculiar for certain aspect.

We can differentiate these applications, for example, from those studying some grammatical patterns and lexical characteristics, characterizing the tendencies of conversational corpora, which were further found its use in educational spheres and currently under interest of critical discourse analyses (Aijmer & Stenström, 2004).

According to Ann Hewings and Martin Hewings (2005), “concordance lines” is a common choice that those corpora can be accessed for linguistic analysis (p.81).

In particular, among the many uses of corpora, one tracks new words, uses and their frequency, which are important for compiling dictionaries. Recent studies of corpora are related with descriptive grammars such as the Collins COBUILD English Grammar and the Longman Grammar of Spoken and Written English (Hewings, 2005). Another use of corpora brings out the context where the words are applied and combined communicatively, that is which provides significant insights on words functioning for communication (p.82). In addition, corpus has been used to compare certain grammatical patterns across various contexts (Sydney et al, 1996), track grammatical changes over time (Geoffrey, 2003), study the language and deal the issues regarding extra linguistic aspects of spoken language, grammar for translation purposes has attracted much interest for aligning the grammatical and lexical equivalents in several languages (Kenning, 1998), and in teaching second/foreign language in either “data-driven learning” (Johns, 1994) or teachers providing “authentic material” using corpora to compare students’ responses with native speakers (as cited in Hewings, 2005, pp.82-88).

In this study, we have chosen Corpora of Contemporary American English (COCA) as a source of data for our analysis. The Corpus of Contemporary American English (COCA) has 560 million words of text (20 million words each year 1990-2017), is widely used and related to other corpora, which can be personalized. Other priorities, not limited to COCA only, include its convenience, replicability, and objectivity along with variety of genres and period.

As our tool and source on tolerance we used the data available for our quantitative and qualitative analysis, which will be analyzed in proceeding sections.

4. Corpora on tolerance

Our study on ‘tolerance’ primarily cover the discussion on the categories such as section, all, spoken, magazine, newspaper, academic (Table 1-a) and on the period of 1990-1994, 1995-1999, 2000-2004, 2005-2009, 2010-2014, 2015-2017 (Table 1-b) that are presented as one continuous table on COCA. We have added the percentage (%) to draw attention on the frequency of each category.

Table 1-a. Frequency by categories (type & per mil, %)

SECTION	ALL	SPOKEN	FICTION	MAGAZINE	NEWSPAPER	ACADEMIC
FREQUENCY	7008 (100%)	911 (12,9%)	417 (5,9%)	1522 (21,7)	1203 (17,1%)	2955 (42,1%)
WORDS (M)	465 (100%)	116, 7 (25%)	111, 8 (24%)	117, 4 (25,2%)	113, 0 (24,3%)	111, 4 (23,9%)
PER MIL	15, 07 (0,015%)	7, 80 (0,007%)	3, 73 (0,003%)	12, 97 (0,012%)	10, 65 (0,010%)	26,52 (0,026%)

Source: Own study based on COCA data.

Table 1-b. Frequency by period

1990-1994	1995-1999	2000-2004	2005-2009	2010-2014	2015-2017
1140	1644	1422	1000	1127	615
104,0	103,4	102,9	102,0	102,9	62,3
10, 96	15,89	13,81	10,39	10, 95	9,87

Source: Own study based on COCA data.

On the second phase, we have looked at the genre or section as it is suggested in COCA. The variety makes twenty-eight types among which magazines, newspapers, academic publications, fiction, spoken type and other. We have reduced the list to ten in order to demonstrate the difference in encounters of tolerance and specify the type of highest use. As it can be observed the period of 1995-1999 indicate the highest figures (1644) and the second highest is the period of 2000-2004 (1422).

5. Thematic structures

All languages perceive sentences as what transmits a message, which makes it communicative. In English theme is marked by its position in a sentence. Both in spoken and written type of English theme is what precedes, and besides intonation marks theme in Spoken English. Relying on Prague School terminology, Halliday (1994) defines the theme as “the element which serves as the point of departure of the message; it is that with which the clause is concerned. The remainder of the message, the part of in which theme is developed, is called ... the Rheme; and the structure is expressed by the order – whatever is chosen as the theme is put first” (p.37). Let us see the following examples given in the table from COCA.

Table 2. Theme-rheme

<u>We're not</u>	<i>playing, " Fulmer said. "</i>	(News.Atlanta, 2006)
<u>I think</u>	<i>there is less tolerance now...</i>	(News.Atlanta, 2006)
<u>As suggested by the participants,</u>	<i>counselors offer multi-channelled counseling</i>	(Acad.CollegeStud, 2012)

Source: Own study based on Halliday (1994) & COCA Data.

We have underlined theme and gave in cursive *the rheme* in the examples from our corpora (COCA). The examples are different in terms of their structure and organization of the message. In the sentence I think *there is less **tolerance** now...* theme (I think) is given by subject and predicate while *rheme* (there is less tolerance) is given in a subordinate construction. Unlikely, in the last example subordinate part represent theme, whereas rheme is given with main clause. As the realization of thematic structures depend on the sentence order, we can distinguish the different types of theme-rheme constructions.

There is also another set of terminology dealing with message structure which are called “Topic” and “Comment”, which, by some grammarians, can replace what we consider as “theme” and “rheme” whereas others think that “Topic” contain “theme-rheme” constructions taken together (Halliday, 1994). In our study, we use “theme” and “rheme” for identifying “known” and “unknown”.

More complete definition of the theme is not limited to considering it as what comes first. Theme is merely one part of a whole message that consists of theme+rheme. Since the theme is the starting point, it realizes the meaning to some extent. Halliday (1994) compares two different messages that are given in two different thematic constructions: “*a halfpenny is the smallest English coin* and *the smallest coin is a halfpenny*” (p.38). The two messages are differentiated by speaker’s intention of what is being told. In the first case, “I will tell you about *a halfpenny*”, but in the second “I will tell you about *the smallest English coin*” (p.38).

As the sentences exhibit a wide variety of structures, the thematic structure differ as well. According to Halliday (1994), we differentiate the following types:

Table 3. Thematic structure's

Simple	Nominal Group
	Adverbial Group
	Prepositional Phrase
Complex	Complex Nominal Group
	Complex Adverbial Group
	Complex Prepositional Phrase

Source: Halliday, 1994, pp.39-40.

We have analyzed around one hundred clauses from different sources including spoken and written types of corpora. Among them we have found more “tolerance” to be expressed in a rheme construction, as something ‘new’ with 64 encontros (64%), whereas “tolerance” as “known” is met in 23 cases (23%). In Hasan the complex structures of either nominal or adverbial group, be a prepositional phrase are considered as “simple”. In addition, this “simple” thematic construction representing one given set are taken as “single constituent” that is known as “thematic equative” (pp.40-41). For example, in **Molecular and physiological approaches to maize improvement for drought tolerance. Seasonal and clonal variations in drought tolerance of Populus deltoids. Gays and lesbians continue to be targeted for verbal and physical harassment despite generally growing tolerance for sexual minorities in the United States (COCA), themes are given in complex nominal groups, while “in the center, and on the right, those of us who believe in tolerance, pluralism, civil rights”** has complex adverbial phrase as a theme.

Table 4. Thematic equatives

Nominalization as Theme	<i>That we're going come up with tough bipartisan legislation to address this because zero tolerance has to be where it is within our military.</i>
Nominalization as Rheme	<i>I read that that you guys have zero - there's zero tolerance for sexism on Bumble.</i>
Non-equative equivalents	<i>Their tolerance for salt also helps them survive in parking strips close to the street.</i>

Source: Own study based on Halliday (1994) & COCA.

Table 5. Mood and clause types

Mood	Clause Type
Indicative	Declarative
Indicative	Interrogative: yes/no
Indicative	Interrogative: WH-
Imperative	Imperative

Source: Halliday, 1994, p.43.

In declarative clauses, theme comes in nominal group either pronoun, common or proper noun as a head, and in nominalized form as well. As their function is subject they are unmarked, unlike of those functioning as adjunct and complement. The last two types use adverbial group, prepositional phrase, nominal group and nominalization. Other than interrogative WH- types, WH element as a theme is exclamatory clauses. Second type is interrogative clause, which varies depending on what the speaker wants to know: the polarity or a piece of information. In the first type the information is maintained by finite verbs (is, isn't, does etc.) while second type, depending on its nature (who, what, how and etc.) the theme is presupposed. In the corpora on "tolerance", we could find declarative sentences where the theme functions as 1) subject, comes in a) nominal group, with pronoun as head (*I read that that you guys have zero - there's zero tolerance for sexism on Bumble. We want to reinforce that Barneys New York has zero tolerance for any form of discrimination. I think there is less tolerance now because we want to spend our time with the young people.* (COCA)); b) nominal group, with common or proper noun as head (*Marijuana withdrawal is even more contentious than tolerance. Ray has little tolerance for those unwilling to work as hard as she does. Townsend believes there is a possibility the new elms may also have some tolerance to elm yellows.* (COCA)) 2) Theme functioning as adjunct, in a) adverbial group (*In business and industrial settings this is referred to as tolerance level. In 1995 our society has come to a point where we can agree that this tolerance and encouragement of the expression of anger is dangerous. In the center, and on the right, those of us who believe in tolerance, pluralism, civil rights.* (COCA)); or b) prepositional group (*For the undergraduates only, low ambiguity tolerance appears to be most strongly related to valuing those elements of course structure. For the graduate sample, a significant correlation was noted for the tolerance for ambiguity score and importance ratings for exams having a single, correct answer. For most, this has been more of an exercise in education than in tolerance* (COCA)); and when theme functions as 3) complement either with nominal group or nominalization (*Human safety, wants pharming done only in nonfood crops, calling for " zero tolerance " of crop-made drugs or vaccines in the food supply. The house they came, until last night they finally overstepped the bounds of my tolerance. The procedure the scientists used to find and screen trees for built-in DED tolerance is exacting* (COCA)). The markedness of themes that we have analyzed in the clauses analyzed are seen in the adverbial group, prepositional phrase and nominal groups functioning as complement. For example, in the above sentences, it is seen from 'in 1995 our society', 'in business and industrial settings', 'in the center, and on the right, those of us', 'for the undergraduates only', and 'for the graduate sample', which mark the themes.

Unmarked type of interrogative yes/no questions contain two themes. Let us see the following example "Is anybody at home?" "Is" being Theme 1, anybody - Theme 2 and "at home?" – Rheme. Marked Theme can be seen in "after tea will you tell me a story?", the same as in your home who does the cooking (Halliday, 1994, pp.46-47).

Unlike other types, the third type, i.e. imperative clause always has verbs as themes. In addition, the two types depending the inclusion persons, that is you and you and I do something. In the second option we select let's/let us form. The markedness can be tracked on "you" forms in, for example, *don't you do that*. Other types of thematic structures include conjunctive, modal adjuncts and conjunctions, relatives. Let us look at the following WH- questions. *How much risk tolerance you have and everything else? Why isn't there tolerance for candidates rights the way there is a building tolerance over the last 50 years for voter rights? What is the goal of " education for difference " if not respect and tolerance for people of all cultures, including those of the West?* Special interrogative conjunction with additional specific words hint the missing information, which the speaker intend to ask and find out.

6. Conclusions

Studying the thematic structure of clause using corpora on *tolerance* gave us some insights on the organization of the message, compare the frequency of constructions tolerance as theme or rheme. This has illustrated tolerance being mentioned, spoken or explained as something unknown and new, despite its long historical background. Academic texts demonstrate as the major category containing tolerance with 2955 (42,1%) out of 7008. Further, the figures on the period of 1995-1999 indicate the highest amount (1644) and the second highest is the period of 2000-2004 (1422). Both periods could be stated as the most common time to promote *tolerance* in various texts.

Among the clause we have analyzed, nominal group, adverbial group and prepositional groups were found. Also, the indicative mood seem to be more common than imperative mood. Declarative sentences take almost 97% of total amount (100 clause), and WH- interrogatives are of 3%. Both as unmarked and marked types of nominalization are scarce in number.

Further analysis of studying our key word (tolerance) can be developed to contextual perspective choosing either specific corpora or comparing in several varieties.

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ANA MARIA DIVISEVICI¹

DRIFTING LANDSCAPES IN BUKOVINA: GURA- HUMORULUI PLACE AND SPACE: A CASE STUDY

Abstract

The aim of this case study is submitted to the complex process of identification, exploration and portrayal of the cultural landscapes originated in the 19th century Bukovina. The Bukovinean landscapes are a complex system of cultural structures with a volatile behaviour in time that needs an accurate retrospective investigation to optimize the examination of the evolutionary process of space and place. The city of Gura-Humorului is situated in the southern part of the land of Bukovina on the Humor river valley at the intersection of diverse geomorphological and climatic elements. The presented aspects outcome from the pivotal factors such as the diversity and the plurality of life of the ethnic groups who were involved in the social and cultural process of Gura Humorului as a region. Our case study in Gura-Humorului provides an example of interpretation of place and space shaped by mental forces and experiences of local inhabitants according to their cultural heritage comprised in a social framework. The cultural complex system of Gura-Humorului urban area is submitted to a large variety which triggers and involves a multidisciplinary analysis and requires a multiscale approach to induce an unbiased picture of landscape time evolution. This paper tries to highlight some particular aspects that contributed to the appearance, effervescence and the dissolution of landscapes classified according to the evolutionary and functional criteria in the area of Gura-Humorului. We intend to create a realistic evaluation of landscape typology based on its historical traces to understand the development of social space in time. The primary cultural elements can be traced back in the middle of the nineteenth century and some elements of which are still visible today.

Keywords: Cultural landscape, drifting landscapes, Gura Humorului, Bukovina

JEL Codes: N93, R23

Introduction

As in any society, an attentive observer has the possibility to detect the primary cultural activities with a symbolic role: freedom of expression, theatre, opera, art, poetry and literature that are connected spatially to institutions with diverse functionalities such as libraries, museums, galleries, and at the same time other cultural visible economic processes marked by visible cultural elements such as access line, factories and industrial infrastructures. All these are the products of human society, elements of dynamic construction in everyday life which emphasize the layout of a settlement. These cultural components are driven by different processes that come together in a particular way, in selected spaces and those places developed meanings for people.

Conducting a cultural introspective in Bukovina, one can look at the segmented juxtaposition of cultural forms and at the identities arising from this supported by the contribution of 11 different ethnic groups, composing the unique aspects of the society with cultural plurality. We can identify in this cultural mosaic a system of ethnic sub-culture which can still be detected in almost all the settlements of Bukovina.

¹ "Ștefan cel Mare" University of Suceava, Romania, amdivisevici@yahoo.com.

A certain example of a miscellaneous ethnic frame evolution is Gura-Humorului city as landmark which defines the peculiarities of multiethnic Bukovina's historical and cultural rise in time.

Here, the Romanians, the Jews, the Germans, the Poles, the Ukrainians and the Roma along with other migrants managed to build a complex of new cultural landscapes over the time. Starting with the year 1775 until the early 1860s the colonization process carried out in Bukovina began with the arriving of the numerous colonists from the provinces owned by the Habsburg noble house and also from other European countries. They settled down on a tributary river Humor, just downstream from the confluence with Moldova. The Humor river flows from north to south and is the main tributary to Moldova river which flows from west to east.

Classification

The typology of cultural landscape is very diverse and there are many conceptions of the classifications. The elements that contributed to the construction of the taxonomy of the spatial and cultural landscapes diversity are: the contributions of ethnic groups, the connection of the awareness with the perspective of the social sciences, the interdependencies with other disciplines as well as researchers' various opinions.

The subjective character of the value interpretation correlated with the expression mode generated by the active components of the landscapes has created a complex system and intricate form of rating (Fig.No.1). I have considered relevant for the process of structuring the cultural landscapes the criteria that highlight and define in the most appropriate way the characteristics of the landscape, following the criterion of its functioning in the territory.

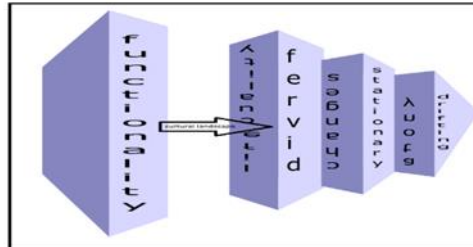
Such a "functional" classification was made by Marina Kuleshova (2011), who identified the two types of landscapes: cultural landscapes, cultural and historical landscapes. In both categories, there are different landscapes marked through their symbolic value, sacral landscapes, industrial ones, resorts, which are subordinated to two major criteria by their present state, being either fossil or active.

In the present paper we illustrate the cultural landscapes through the methods, proposed by Prof. Pompei Cocean (2014) who identifies three types of landscapes:

- the fervid landscapes
- the stationary landscapes
- the drifting landscapes.

Under the general historical, social, economic and political conditions of evolution of Bukovina, there are several perspectives in the development of the unique cultural features of Gura Humorului town, which indicate a particular way of the evolution of the place.

Figure 1. The three levels of cultural landscape typology are generated by the Bukovina political and social conditions

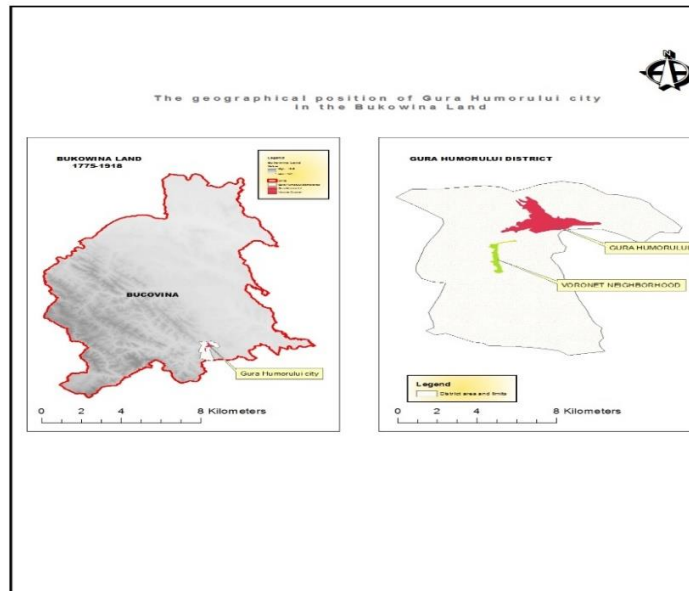


Source: Author.

The location of the research area

Research Area- the town of Gura-Humorului is situated in the southern part of the land of Bukovina (Fig.No2) on the Humor river valley at the intersection of diverse geomorphological and climatic elements. The city developed one two river axes: from north to south the Humor river a tributary to the main river of Moldova which forms de second axis and flows from the west to the east. By emerging in time the Voroneț village situated in the west, a famous sacral landscape was included in the city limits.

Figure 2. Geographical position of Gura Humorului

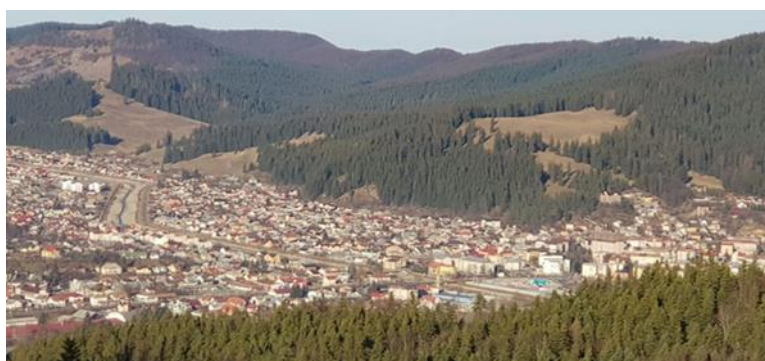


Source: Author elaboration in Arc-Gis programme by using data elevation model offered by San Diego Supercomputer Center (University of California, San Diego).

The town was formed in the hydrographical depression resulting from the confluence of the two rivers, Humor with the Moldova river, at the lithological and structural contact between the mountain and

mountainous units of Bukovina. The settlement has in time developed on the river beds first and by the directions imposed by the rivers: north-south on the valley of tributaries Humor, Voronet, Suha, and respectively south-west on the valley of the main river Moldova. The amphitheater-shaped basin is surrounded by large, low-lying, prolonged and forested mountain ridges, called “obcine” surrounding the depression; To the north, the Obcina Mare (The Big Ridge), having the Peaks of Rogoza 1074m and Toaca, to the south of Voronet Obcina with Magura Peak (816m). In the east-west direction the valley is dominated by the long river-bed of the Moldova which opens wide to the eastern boundary of the area. (Fig.No.3).

Figure 3. Gura Humorului city



Source: Photo: A.M. Divisevici 2018.

Methodology

The complexity of the Bukovina views, implicitly from the city of Gura-Humorului required a rigorous observation, subjected to the interdisciplinary approach geographical, demographical and historical and on the other hand the socio-cultural one. To this we added the identification of the components in the field with the analysis and the interpretation of the active-functional and real-interpretive dimensions of cultural landscapes.

In order to outline, describe the morphology and decode the socio-psychological response produced by the cultural landscapes in Gura Humorului in the present study we tried to loom the essential aspects generated by the internal dynamics of the cultural landscapes distinguished on the criterion of functionality.

I analyzed the old and new maps, the cadastral plans of the region² interpreted the original local information by correlating them with the study of historical and demographical documents, field observations in an attempt to decipher the social evolution of cultural landscapes. The digital models used to create cartographic materials were generated in the Arc Gis programme.

² Maps used: -Mieg,Fr.von (1778)- "Plans des Bukowiner districts bestehend in 72 Sections welche in denen Jahren 1773, 774 und 775 von einem Departement des Kays : Königlicher General staabs geometrisch aufgenommen worden (1:28000) ",Wien,Kriegsarchiw,BIX a 425, Arhivele Naționale București, CVII 1.

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Results and discussions

In order to understand the Humor landscape, we made a short retrospective of Gura Humorului town. The first information about the cultural landscape can be detected during the Middle Ages, at which time there were the first intimate and antropical interventions to occur in the natural environment.

A settlement located near the current town of Gura Humorului was first reported in a document issued by the chancellery of medieval Moldavia in 1415. The act of the ruler mentions the actions of the chancellor Oana, who started the plans to build a new place of worship in the old area of the monastery³ and implicitly a rural settlement at the confluence of the Humor River with the Moldova, at a distance of 6 km from the current town. There is unclear information about the previous existence of a Tatar military camp in this place in 1286. Landscape modelling in the Early Middle Ages generated the presence of some forms of habitational rural landscapes with agricultural features eroded by the historical time. The medieval settlement gradually developed, being a typical Romanesque rural community, the landscape aspect is described in various historical documents: the forest areas from the mountains were deforested from the riverbeds to the heights, resulting in a glade of agricultural farming having a zootechnical character. The inhabitants and the monks have had a pastoral life and as basic occupation the raising of cows and sheep.

The small village of Gura Humorului⁴ overlapped in the place where the most important eastern-oriented access path in the north of Moldavia (the future Bukovina) was created, which led to the conditions for facilitating the penetration of migrants, known for their numerous invasions, attacks and devastation.

At the end of the XVI century, due to the geopolitical instability as well as the numerous wars, the pendulum migration of ethnic groups on the valley of Moldova, the habitational cultural landscape transformed, resulting in the appearance of the first abandoned landscape. In those harsh times the peasants deserted the village under the pressure of geopolitical and local severe factors mentioned.

The habitat landscapes that compose The Meadow⁵ of Humor undergo for the first time the three evolutionary stages to drifting landscape⁶ from the point of view of the evaluation and classification on the basis of the functioning of the space system.

Numerous other landscaping changes followed, but the most profound were made with the emergence of new political and historical conditions resulting from the formation of Bukovina province as part of the Austro-Hungarian Empire.

In this first stage of major land modeling, many ethnic groups contributed to the process of shaping of the place as they came and settled down in the small market town of Humor. In addition to the Romanian natives, monks and farmers settle down starting with the year 1775 together with the Lipovans, the Germans, the Ruthenians, the Jews, the Poles, the Armenians and the Slovaks and the Gypsies. In 1767

³ In the 15th century boyard Ivan, during the reign of Alexandru cel Bun 1400-1432, raised a stone church on the site of an old wooden church that collapsed in 1527. In the same place between 1528 and 1530 the boyar Toader Bubuiog built a new monastery.

⁴ Toponym meaning the Humorului river mouth bar formed at the confluence with Moldova floodplain.

⁵ The Meadow of Humor was described by the King of Moldova, Stephen the Great in a document 1490 as an infield part of the Monastery propriety.

⁶ According to the classification of the habitat landscapes made by Professor Pompei Cocean at Babeş-Bolyai University (Cultural Landscapes, 2014).

Winiger, a German citizen of the town, noticed the presence of 44 houses on a map made by the military cartographers from the Austrian Empire in 1773⁷.

The Romanians, the descendants of Moldavian peasants, were the first inhabitants in the area, being the majority and occupying the central part of the locality, extending north on the hills and on the right side of the valley of Moldova and towards the south on Voroneț River where the Ruthenians arrive later. The Slavs who formed a community under the generic title *ludi-Humora*⁸, were the first emigrants who arrived before Bukovina appeared, their presence was identified before 1700. In 1775 they constituted the Ukrainian or the Ruthenian colonies along with the Lipovans composed of 14 families originally located in the low part of Moldova's meadow, river terraces to the south and west of the area. However, there were 140 families in 1784. Their number will increase over time. Their traditional occupations were fruit and vegetable-growing. At present, the cropland system developed by them with open-field landscapes, can also be identified on the terrace of the rivers.

The German colony called Bori was formed in 1835 and numbered 296 inhabitants from Bohemia, who settled on the Bouri valley on the higher slopes and on the left terraces of the Humor brook, to the northern periphery of the market town. They formed a compact ethnic community structure with exclusive German inhabitants. Currently, only on the higher peaks from the northern edge of the town in the Boureni district on the Obor Street⁹ some old houses have a few elements in the German architectural style that can be identified. Near these houses one can find as well as the old school and a stone cross framed in a small decrepit Catholic construction as a landmark witnessing the passage of Germans through these places (Fig No.4). Another element of the sacred landscape in the center of the present settlement is the Catholic Church "Holy Baptism" erected in 1787.

Figure 4. The area of German Bori colony at present



Source: Photo: A M Divisevici, 2018.

⁷ Yeshurun, Sh.et all (2017)- "Gura Humorului - a small town in southern Bukovina, the history of a Jewish community, Gura Humorului, p24.

⁸ Wrenka, D.(1895) –"Topographie der Bukowina zur Zeit ihrer Erwerbung durch Oesterreich (1774-1785) Nach akten aus folgenden Archiven; k.k. Kriegsministerium, dessen Katasterarchive; k.k. Ministerum für Kultus und Unterricht"-Czernowitz, p32.

⁹ Market Street.

In 1775 there were 12 Jewish families, and in 1857 their community consisted of 190 people who were heading northwards, forming an initial colony on the right side of the Humor stream adjacent to the German one, where from time to time, for more than 50 years extending southward, they gradually occupied the central area of the city, around the food market and the east-west longitudinal axis of the main road around which the entire settlement is defined. Their number will increase to about 3000 people in the early 1940s.

The Jewish community gradually imposed itself primarily because of the economic activities with a commercial profile, most of their shops were located in the central part, in the town square and on the main access roads. They formed an exclusive Jewish neighborhood with the dwellings located on either side of the north road leading to Humor Monastery. They built durable buildings, high-rise houses in Jewish style being evident in the habitat landscape today (Fig.No.5), especially in the north of Humor Monastery and Saint Gavril Streets.

Figure 5. Manastirea Humorului street in 1899 and 2018

On the right side Schapira house owned by one of the richest Jews



Source: Reproduction through the courtesy of Lucy Glaser-head of the Association of German Residents of Gura Humorului and A. M. Divisevici 2018.

Less obvious in the construction of the cultural landscape is the contribution of the Poles, the Armenians and the Slovaks who were fewer. The traces of their presence were harder to identify either because they had a temporary stationary position or because they were either embedded in the German mass because they were subjected to a process of cultural assimilation in the dominant German background of the time.

During the Austro-Hungarian domination of Bukovina, the economic activities were controlled by the Jewish community and, to a lesser extent, by the German one. The industrial landscape was connected to industrial branches such as mining, lumber production (Fig.No 7) and processing of textile and food products. The industrial landscape consisted of more than 10 sawmill factories owned by the Kisman, Scharfstein, Schieber, Wagner, Leibowitz, Steinhorn, Roll, Lipp and Wasserman families. There is also a vinegar factory, several flour mills, fish processing centers, etc. All these were nationalized during the communist era.

The electric plant (Fig.No.6) built in 1924 is an example of a drifting landscape currently inoperative, the space occupied by it being abandoned.

The steam plant was built by the Zigelli engineer and it was made up of a steam generator fired with firewood and having an energy capacity of 76 KW. It was situated on the left bank of Humor to the south, today being in the central part of town. This provided street lighting with lamps, as well as electricity to the town hall and the cinema. The plant functioned constantly, being upgraded to modern requirements until the 1950s. Then it fulfilled other functions. The museum dedicated to this industrial unit was dismantled and the most valuable mechanical parts of the industrial equipment admired by foreign and Romanian tourists disappeared.

Figure 6. The electric plant



Source: Photo: A M Divisevici, 2018.

Gura Humorului is growing in importance, being raised to the rank of trade town and administrative-territorial center in 1820, then to the trade town in 1880 and the district capital in 1893, and finally, in 1904, it receives a city status. The ethnic communities will dissolve in the communist era, but the traces of their presence are still detectable today in the cultural landscape.

The second major stage in the evolution of the cultural landscape condition of Gura Humorului takes place after 1940 with the division of Bukovina when the space cultural-social system receives new functions. In the southern part of the former province belonging to Romania where Gura Humorului is located, the cultural landscapes were subjected to the pressure of some new political, historical and social factors.

The functional criteria in the city of Gura Humorului in the first half of the 20th century, were mainly the industrial and commercial ones. Those new conditions determined either the transformation of existent landscapes or the emergence of new ones.

After the interbellum 1914-1945 period the main industrial activities were related to mining, lumber production and processing of agricultural products through milling, bakery, butchery, etc.

Figure 7. The lumber sawmill owned by Hayim and Schapira near the water plant.
The sawmill was destroyed twice and reconditioned. The sawmill burned in 1931 but Shlomo Schapira rebuilt it. The unit functioned until 1948 when it was turned into state property.



Source: Reproduction through the courtesy of Lucy Glaser-head of the Association of German Residents of Gura Humorului and A. M. Divisevici 2018.

Today there are few traces of the capitalist times preceding World War II, but the elements of the Communist period (1947-1989) are more obvious. In the years of communism the morphology of landscapes underwent extensive transformations, as the third stage of transformation of cultural landscapes. Much of the cultural components supporting the social diversity features were wiped out and replaced by typical socialist elements and developing images defined by the extensive industrial spaces or by the neighborhoods with common dwellings composed of the monotonous residential areas with repetitive blocks that have destroyed the private and picturesque features of the provincial town Gura Humorului.

In 1986 the mining center was set up in Gura Humorului by subordinating all the local neighborhood mines.

After 1989, the latest psychological and social transformation takes place in the mental space and directly in the cultural landscapes. There has been a functional restructuring of landscapes process conditioned by profound changes produced in post-communist society and at the same time an economic decline phenomenon characteristic to the entire Romanian economic life.

For the small city Gura Humorului the urban renewal has been a controversial process in an attempt to restore the mining sector and private industry. The failure of the reconstruction of this sector has led the authorities to develop the service sector, Gura Humorului becoming an important tourist resort for South Bukovina.

In time the industrial landscape became a brownfield or *frische*¹⁰, and the third stage of landscape dynamics has been reached.

Today the industrial drifting landscapes are made up of 8 industrial units: The Cotton factory, Mining, Rubber Engineering, UFET and UMTCF, and timber factories employing 8,000 employees 20 years ago.

From these landscapes only a few physical components remain, creating the possibility of the landscape morphology imagined as a pluricultural complex to be restored. The spiritual values have resisted better in time, being imprinted in the collective memory of the people of the place.

Conclusions

All the ethnic communities have contributed to a vast and complex process of cultural diffusionism through the transfer of social and mental values, as well as through the exchange of habits and mentalities between ethnic communities, through free spiritual expression or artistic cultural activities, but also through the practice and common economic and interdependent social activities. There has been a peaceful, constructive cohabitation between the various ethnic entities that have been existing for several hundred years.

Following up the process of construction and decomposition of cultural landscapes in time using the criterion of functionality developed the existence of four major stages:

- the embryonal premodern phase (1400-1775), characterised by the slow changing in the environment and agricultural functionality.
- the Habsburg Monarchy administration of Bukovina as a division of The Austrian Empire, (1775 -1918) and the capitalist interbellum period (1918-1945) when the first cultural pluri-ethnic landscapes and first industrial landscapes emerged and developed and the fervid landscape stage was reached.
- the communist period (1947-1989) represented by the intense industrial activities in Gura Humorului followed by the decadence of the traditional multi cultural landscapes and raising of the industrial one, leading to a differential transformation of the landscapes, related to new functional situation. The traditional ethnic, and old industrial landscapes transiting to stationary and drifting grade.
- the post-communism period (1989-present day) is distinguished by the reorganization of the economic national system, by constructing a free market economy. The cultural landscapes evolution is marked by the conversion from effervescent industrial ones to abandoned or drifting landscapes.

¹⁰ V.Chiriță, Geographica Space Organisation from an Environmental Point of View. Why BuKovina? The IXth Edition of The Environmental Quality and Land Use (EnQa_Land Use 2013 Symposium Stefan cel Mare University).

In Gura Humorului the new cultural features have emerged, features that ensured the presence in the modern age of a unique cultural complex composed of efferescent, dynamic landscapes. In the 144 years of Bukovina's existence, these components have been permanently reformed and reformulated, and after the disappearance of the administrative structure these landscapes have become stationary. In the communist period, the cultural landscapes built by the ethnic groups largely underwent the drifting stage.

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**OXANA YURYEVNA POSUKHOVA¹, LUDMILA VLADISLAVOVNA KLIMENKO² AND
PAVLINA VIKTOROVNA BALDOVSKAYA³**

**LABOR PRECARIZATION OF HELPING PROFESSIONS IN RUSSIAN CITIES:
EMPIRICAL EVIDENCE**

Abstract

In the conditions of educational and health institutions reforming and a series of economic crises, representatives of helping professions move to the precarization zone. Based on the research conducted in the spring of 2017 (2,054 school teachers and 870 physicians in state organizations in Moscow, Rostov-on-Don and Kazan), signs of precarious labor were identified: instability, the risk of job loss/changing, an increase in workload, not accompanied by higher wages, social and economic vulnerability.

The empirical data shows that despite the satisfactory self-assessment of socially-oriented professionals' life, the level of precarious labor is higher for teachers from provincial cities and lower in the capital schools. In the field of health care, the extent of precarization is approximately the same in the different cities. Most teachers and doctors are concerned about the growth of workload without increasing wages and the risks of job loss. The majority of representatives of helping professions do not agree with the fact that the state effectively solves the social and economic problems of teaching. At the same time, interviewed teachers and doctors will take a rather passive attitude in case of violation of their labor rights. Nothing will be done by more than a half of all respondents. However, the excessive regulation of school teachers and physicians, on the one hand, and the continuing high demand for the work of schools and hospitals on the other, are associated with the risk of social tension increase in the Russian society.

Keywords: Labor precarization, helping professions, school teachers, physicians, instability, workload, vulnerability

JEL Codes: J28, J81, A13, Z13

Introduction

A series of economic crises, a decline in the production, an increase in unemployment and instability of the labor market have led to an increase in the flexibility of social and labor relations in the Russian society. The wage payment system and working time arrangements are unsustainable, often violating the employee's labor rights. In the sphere of hiring and installment, the rules and procedures for dismissal, transfer to worse payment principles and working conditions are simplified. The deterioration of the social and labor situation of a large number of workers, the growth of their social vulnerability and instability in the labor market, the expansion of informal employment has been designated as the process of precarization in the academic literature.

Under the conditions of education and healthcare institutes reforming, as well as the passage of a series of economic crises, the situation of Russian teachers and physicians even does not improve but worsens in many aspects. It is possible to distinguish the following signs of precarization of teachers' and physicians' labor: social and economic vulnerability, instability and risk of loss/change of work, growth

¹ Candidate of Sociological Sciences, Associate Professor, Southern Federal University, Russia, belloks@yandex.ru.

² Doctor of Sociology, Professor, Southern Federal University, Russia, lucl@yandex.ru.

³ Intern Researcher, Master Student, Southern Federal University, Russia, pvbaldovskaya@gmail.com.

of the workload without increase in wages, failure to respect the social and labor rights (Klimenko LV, Posukhova O.Yu. 2017a; 2017b). At the same time, the worsening socioeconomic situation, unnecessary overload labor and administrative burden, high social demands on the results of teachers' and doctors' work reduce the effectiveness of their work, lead to professional demotivation, weaken the potential of the education and health system reforms. Therefore, the purpose of this paper is to characterize the degree of labor precarization of helping professional groups (teachers, physicians) in Russian megacities on the basis of the applied research.

Literature review

In Germany, about a fifth of all employees are involved in precarious work, and about a quarter of the able-bodied population - in France, Holland and Greece (Gasyukova 2015; Gialis, Tsampra 2015). Rise in uncertainty and risk are increasingly characterizing the American labor market (Kidder 2016). The processes of the employment structure deformation were manifested in Japan, South Korea, where 40% to 50% of economically employed people work on unstable employment conditions (Standing 2014; Pilling 2014). Under current conditions people with a relatively high level of education also have to be content with work that has a status or income below their qualifications (sign of the precarization processes). This phenomenon is widespread among young professionals in Japan (Kosugi R., Mouer R. 2008).

According to the Russian Longitudinal Monitoring Survey (RLMS), the average length of service was declining from 1994 to the crisis of 2008-2009 in Russia. In spite of the fact that the opposite tendency is emerging, it remains still much lower than in 1994. New forms of precarious employment also often involve impairment of the social and labor rights: outsourcing and outstaffing, staff leasing, hiring of temporary staff. But not all of them contribute to the rational use of working hours and the development of an innovative economy (Bazhina et al. 2004). The number of precarious groups, therefore, is constantly growing, including people, who have permanent employment for a moment and are often classified as a middle class (Toshchenko Zh. T. 2015). Under the crisis of 2015 a sharp expansion of the poor group and a general depletion of Russians also led to the replenishment of precariat (Slobodenyuk E. 2015).

In academic literature the problem of precarization is considered in connection with a low assessment of the profession's social status (Fuller C. 2013), educational reforms that increase the workload (Cheung ACK, Man Wong P. 2012) and adversely affect the professional identity of teachers (Hall D., McGinity R. 2015). Specialists note that the new monitoring, inspection and public reporting systems directly related to the performance rating, in addition to the increased bureaucratic burden, lead to a growth of the level of uncertainty, instability and vulnerability of teachers as a result of these reforms (Ball S. J. 2003). Under education system reforms teachers are jammed, on the one hand, by the requirements of the administration, and, on the other, by the resistance of students (Yan C. 2012).

Similar problems of medical work are recorded in a number of foreign countries. Low incomes, overload labor, general dissatisfaction are aspects of Chinese physicians' work (Wu D. Wang Y. et al., 2014). Their European counterparts suffer to a lesser extent - only the young doctors are at risk of falling into the precariat zone (Iliffe S. 2017). In the United States, the need for reform was primarily aroused from the inaccessibility of health care for the general public and the disintegration in health services provision. The main point for criticism from American physicians remains the decline in their autonomy (Emanuel E. J., Pearson S.D. 2012).

Design of applied research

The applied sociological research was conducted in three Russian megacities - Moscow, Rostov-on-Don and Kazan, - among representatives of helping professionals (school teachers, physicians from state-financed institutions) in the spring of 2017.

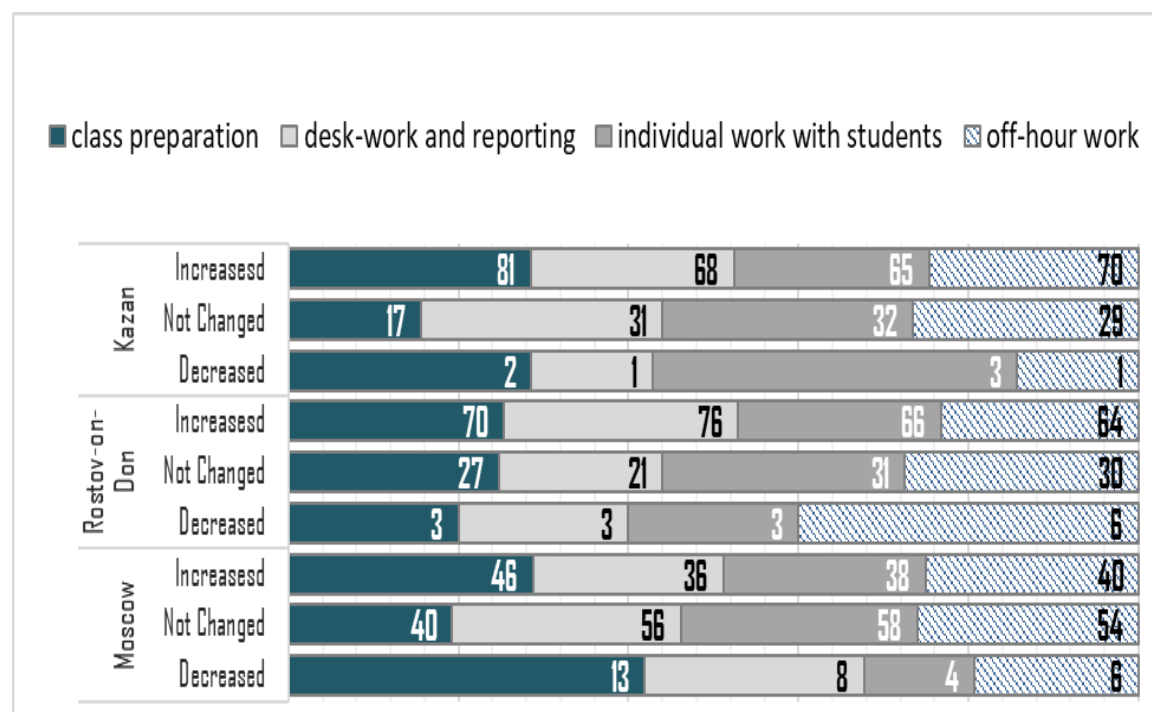
The sample of the mass opinion poll is quota-proportional, the statistical error of the survey does not exceed 4-5%. A total of 2,054 school teachers and 870 doctors from three cities filled self-completed questionnaires.

Teachers' and Physicians' labor precarization assessment

Empirical evidence suggests that social-oriented professional labor precarization levels in province and the capital are different.

From 36% to 46% of Moscow tutors experience workload increase compared to 64%–76% in Rostov-on-Don and 65%–81% in Kazan. Furthermore, the majority of Moscow and Kazan teachers claim that class preparation and off-hour work are taking more and more of their time, while Rostov-on-Don specialists are rather concerned about the growing amount of desk-work and unnecessary reporting (Fig. 1).

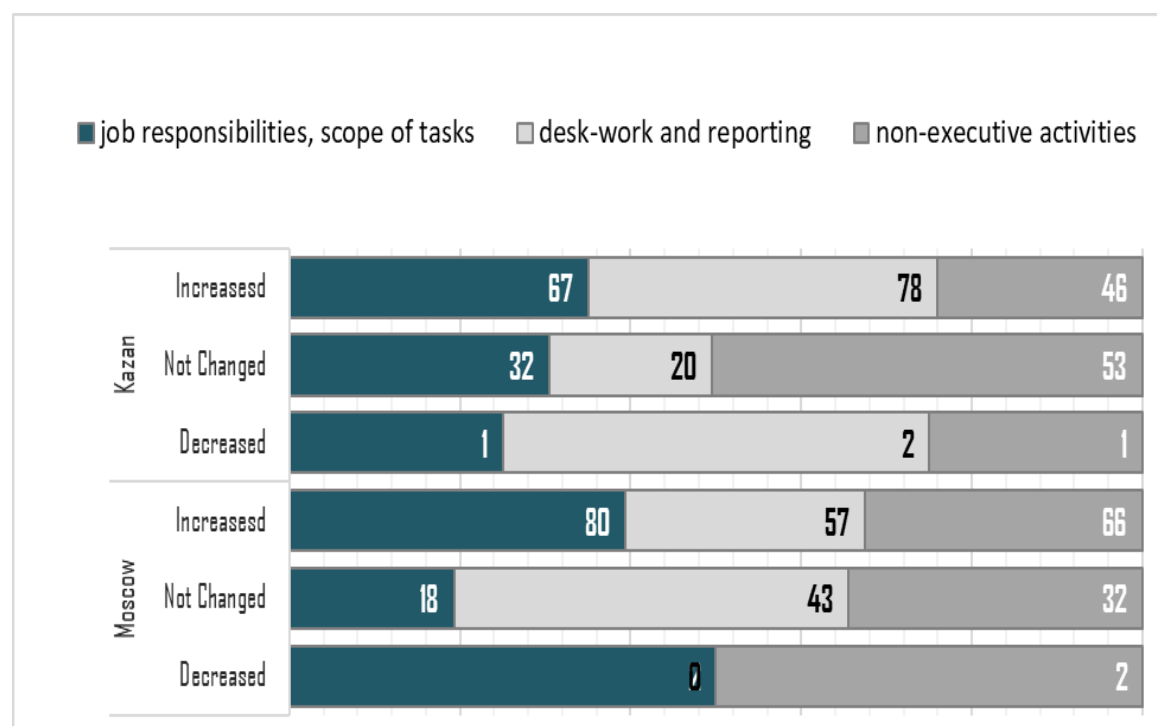
Figure 1. How has your workload changed over the past 1-2 years? Teachers, single choice, %



Source: Authors.

Medical staff polls unravel rising workload levels in Moscow and Kazan within the last 1-2 years with job responsibilities to surge by 80% and 67% respectively. Increasing desk-work is reported by physicians from Moscow (57%) and Kazan (78%). Additionally, workload increase unrelated to job responsibilities is observed by 66% of Moscow physicians compared to only 46% in Kazan (Fig. 2).

Figure 2. How has your workload changed over the past 1-2 years? Physicians, single choice, (%)



Source: Authors.

In our study, social oriented specialists were also asked if they are concerned about precarization effects. The results demonstrated that school teachers are worried about the risks of workload increase without a pay raise (Moscow – 71%, Rostov-on-Don – 84%, Kazan – 73%), a job loss (Moscow – 78%, Rostov on-Don – 62%, Kazan – 49%), salary reduction or delay (Moscow – 58%, Rostov-on-Don – 48%, Kazan – 41%), and involuntary transition to underemployment (Moscow – 55%, Rostov-on-Don – 41%, Kazan – 35%) (Table 1).

Table 1. Distribution of respondents' answers to the question "How much do you currently worry about the following professional risks?" Teachers, single choice, %

Professional Risks	Moscow				Rostov-on-Don				Kazan			
	Does not bother at all	Rather does not bother	Rather worried	Very worried	Does not bother at all	Rather does not bother	Rather worried	Very worried	Does not bother at all	Rather does not bother	Rather worried	Very worried
salary reduction or delay	24	18	36	22	24	27	29	19	30	28	23	18
involuntary transition to underemployment	15	30	31	24	32	27	26	15	33	33	20	15
growth of workload without increase in wages	9	20	36	35	4	13	34	50	12	15	34	39
job loss	6	15	25	53	15	23	25	37	22	29	18	31

Source: Authors.

Precarization induced risks are more of a threat for Moscow physicians than those living and working in Kazan, and also tutors in general. The overwhelming majority of the interviewed physicians working for a publicly funded medical institution in Moscow and Kazan are worried about workload increase without a pay raise (Moscow – 95%, Kazan – 63%), a job loss (Moscow – 89%, Kazan – 57%), salary reduction or delay (Moscow – 89%, Kazan – 43%), and involuntary transition to underemployment (Moscow – 75%, Kazan – 30%) (Table 2).

Table 2. Distribution of respondents' answers to the question "How much do you currently worry about the following professional risks?" Physicians, single choice, %

Professional Risks	Moscow				Kazan			
	Does not bother at all	Rather does not bother	Rather worried	Very worried	Does not bother at all	Rather does not bother	Rather worried	Very worried
salary reduction or delay	3	9	32	57	27	31	22	21
involuntary transition to underemployment	7	17	38	37	31	40	20	10
growth of workload without increase in wages	1	4	41	54	19	18	34	29
job loss	3	7	32	57	20	24	34	23

Source: Authors.

Conclusion

Health care and educational sector reforms aimed to improve the quality of services turn into desk-work overload, unnecessary reporting responsibilities, new formalized operational standards adoption that leads to teachers and doctors unable to do their job of teaching or curing people. The study provides empirical evidence of lower tutors' labor precarization level in the capital compared to province, and almost identical doctors' labor precarization levels. Tutors and physicians are mostly worried about the risks of workload increase without a pay raise.

Health care and educational sector reforms often result in doctors and teachers losing reliable guarantees of employment. Constantly upgrading standards ask a lot of social oriented specialists who are unsuitable for desk-work or just lacking technical abilities, that eventually leads to natural push-back on innovation. On top of that, workload increase frequently comes without any pay raise at all, which, coupled with inflation, may end in the disposable real income being decreased. Immoderate teachers' and doctors' activity regulation on the one hand, and high expectations people put on schools and hospitals on the other, create political tension in the Russian society. As a result, these problems discourage teachers and physicians from being professional, and bring public sector down to stagnation.

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**STEFANIA DIMOPOULOU¹, VASILIKI AVGERINO², STAMATINA-ELENI SAMIOT³
AND TRIPOLITSIOTI ALEXANDRA⁴**

**TOTAL QUALITY MANAGEMENT AS A SELF EVALUATION TOOL IN FINANCIAL AND
SPORTS ORGANIZATIONS**

Abstract

The significance of the contribution of the Quality Management to the improvement of the competitiveness has been acknowledged since the beginning of the 1955. The aim of this paper is to list the ways, and the strategy, which the financial institutions and sports organizations have established in order to improve the quality of their products, to pushed their success and survival through their quality. In the cotemporary demanding and competitive environment, which is marked by uncertainty and complexity, the financial institutions and sports organizations aim at their success and survival through their quality. We are going to analyze the strategy followed by the administration of the financial institution and sports organizations in order to attain business excellence in all the sectors of their financial activities. The total recording and the examination of the financial institutions' strategic choices in order to achieve business excellence with the now days conditions is of utmost importance for the sounder auditing of the financial institutions. In addition, the study and the investigation of the principles, the tools as well as the methods of business excellence are being recorded as one of the most important factor of the corroboration and amelioration of the financial institutions and sports organizations competitiveness emphasizing in the aspect of innovation. Regarding the methodology and the means use for the fulfillment of the purpose above, Greek and foreign bibliography has been used. Useful information from official websites, and published essays as well as databases and international organization statistics were also used.

Keywords: Total quality management, productivity, quality tools, European Foundation for Quality Management, strategy, business Excellence, self-assessment, financial institutions, sports organizations

JEL Codes: M10

1. Introduction

Financial and sports organizations have to survive in a very competitive and quickly developing environment. Thus, lead the organizations to adapt quality as the most important factor for creating competitive services and products, in addition with the rapid development of the technology [1]. The most important condition for the success of financial and sports organizations is the embodiment of the principles of total quality management, in philosophy, identity and culture of each organization.

The capability of development for new technologies in productive processes and products, combined with quality, continuous improvement and productivity, with emphasis to the consumers and specifically to the human factor, considered the most effective solution for the survival of organizations.

The meaning of quality is multifaceted and complicated. Hence, there is more than one definition for quality. The complexity of definition is made due to the differentiation of the way of interpretation that the term of quality accordingly has [2]. Quality offers a satisfaction to customers, profitability, low cost

¹ University of Peloponnese, Greece, dimo_s@hotmail.com.

² University of Peloponnese, Greece.

³ University of West Attica, Greece.

⁴ University of Peloponnese, Greece.

and maximization of the competition between organizations. Therefore, quality is one of the most important conditions for success through improvement and upgrade of the administrations [3]. Eventually, the meaning of quality is based on eight different dimensions, which are autonomous and independent. A new product that is located at design phase, has already determine the 90% of the product cost. Administration has the obligation to systematically examine the market section, in which the product is addressed and has to determine the needs of the customers [4].

In this paper an analysis of the strategy of financial and sports organizations was held, in order to attain business excellence in all the sectors of the organizations' strategic choices in order to achieve business excellence with the now days conditions. In addition, the study and the investigation of the principles, the tools as well as the methods of business excellence has been recorded as one of the most important factor of the corroboration and amelioration of the organizations competitiveness, emphasizing in the aspect of innovation.

2. Methodology

The improvement and the survival of an organization can be obtained by the preservation of a competitive advantage against their competitors. This can be achieved through the establishment of the quality. Also, they try with systemic way a continuous improvement through the total quality management, which is the main factor in developing the quality. An ideal goal of all financial and sport organization is the achievement of business excellence. Business excellence refers in use of the tools and principles of quality management, with emphasis in the improvement of efficiency in the whole operating levels of an organization. It is connected with specific models applicable worldwide from the most financial and sport organization in order to achieve excellence [5]. The foundation of models has a purpose, the promotion of quality through the inducement of continuous improvement and the focus of organizations on implementation quality strategy.

Indicatively, business excellence models can operate in organizations as a tool of self – evaluation and self – amelioration. Also, these models can become a guide for tracing regions that need improvement [6]. Financial and sport organizations can apply a business excellence model and then they can progress to an amplifying competitiveness.

In addition, the application of a business excellence models, organizations will have the ability to achieve important results, that will lead to the satisfaction of the stakeholders and eventually to provide value to consumers. Administration of organizations has the ability to guide and set goals to human resources, which will grow and give many chances inside and outside the environment of an organization. Business excellence gives emphasis in Corporate Responsibility, Stakeholders, Total Quality Management and Corporate governance [7].

To achieve business excellence in organizations, have been developed specific business excellence models, in order to offer basic advantages in quality. The most important business excellence models/awards are:

- Deming Application Prize, 1951
- Malcolm Baldrige National Quality Award, 1987
- Australian Quality Award, 1988
- European Model (EFQM), 1991 [8, 9].

Through the continuous improvement, organizations can be more flexible and competitive. Also, they have to know their ability aiming their improvement. One major problem is the inability to detect

weakness in the organizations. So, they have to apply and use a self – evaluation in order to improve their performance and lead the organizations to business excellence. The meaning of self – evaluation is a systematic procedure, which helps organizations to determine and understand the sectors that they have to make improvements.

With self – evaluation financial and sport organizations can review their activities with reference to European business excellence model. Sometimes organizations can't determine their weakness. Hence, self – evaluation suggests that organizations are the element of evaluation, as a result every aspect of organization have to be exploited in order to achieve an inside view of the organization [10].

An organization that seeks to self – evaluation, has to apply it gradually inside the organization. Self – evaluation consists by three phases:

- In the first phase, there is the collection of evidence, with different approaches. Like pro – forms and worksheets, group discussions, interviews, questionnaires, study of quality manuals and the documents of application that will be deposited by the organization for the acquisition of a business excellence award.
- In the second phase, there is an analytical evaluation of evidence that have been collected for the detection of strong and weak spots of the organization in order to improve them.
- In the third phase of evaluation, the final improvement plans and actions that have been extracted from the evaluation procedure, have the ability to be applied separately, either as a part of the whole quality improvement neither as a part of business plans of the organization.

These three phases of evaluation can be applied in every aspect of the organization and in different level at the same time [11].

Self – evaluation can be used as a tool of diagnose and has to be done as an integral part of the annual scope. It also interacts with the strategic design, the annual modernization, as long as with the functional design. Self – evaluation of organizations can be part of the Plan Do Check Act cycle, and the purpose is to record, stabilize and extend the progress. Alongside, a redesign of goals and strategy has been done in order to offer a base for the next phase of the design. On the other hand, the European model of business excellence suggests the self – evaluation procedure as an integral part of organizations' strategy [12]. The application of self – evaluation offers to the organizations amelioration of their performance with the increase of competition and effectiveness. It has the possibility to be applied in public or private organization and characterized as the tool of organizational learning towards to business excellence [13]. Finally, there is a self – evaluation procedure with the RADAR logic (Results, Approaches, Deployment Assessments, Review), which is the official initiative for the evaluation of organizations and offers the way of the total valuation of financial and sport organization. RADAR logic has been used for the ratings in each criterion separately. The meaning of RADAR logic is an assessment method of organization with specific technical requirements for business excellence and it is based in logic of continuous circular improvement of Deming.

3. Conclusions

The basic requirement of organization success is the introduction and the embodiment of the total quality management in the philosophy, identity and culture of financial and sports organizations. The development of new innovations in productive processes and products in addition with continuous improvement and the emphasis in human factor is the most effective solution for the survival of

organizations. Total quality management leads to bigger profits with lower cost, better quality of products, and better costumers' satisfaction. Thus, leads to higher competition between organizations. Financial administrations are using total quality management to improve and upgrade their products. The use of total quality management is considered mandatory and is the most important factor to achieve business excellence.

The achievement of business excellence is very important because is the most suitable way to evaluate organizations. The adoption of principles, tools and methods of business excellence are the factors that lead the organization to be competitive in market. Organizations have to focus in the total improvement and effectiveness. They can achieve that by using a breakdown in internal organization and procedures. The use of a business excellence model will help the organizations to diagnose and understand financial situations. Business excellence has specific models, and they can be applied worldwide. The primary purpose of establishment of these models is the quality of products through self – evaluation. Self – evaluation is based on a business excellence model. It gives to organizations the ability to distinct their strong points, but also regions that need improvements. With this method organizations can determine and do some improvements. Organizations are also in position to determine the current situation and their needs and priorities.

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