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Povzetek

Tolmačenje slovenskega znakovnega jezika na področju visokošolskega izobraževanja gluhih zahteva posebna znanja in veščine. Za razumevanje problematike je potrebno razumeti gluhoto in način komunikacije gluhih. Sprejetje Zakona o uporabi slovenskega znakovnega jezika je odprlo pot novemu poklicu – tolmaču/tolmačici slovenskega znakovnega jezika. V empiričnem delu so na podlagi kvalitativne študije, raziskane težave tolmačev pri tolmačenju v visokošolskem okolju, vzroki za le-te ter dejavniki, ki vplivajo na kvaliteto tolmačevega dela, kot tudi strategije in alternativne rešitve, ki se pojavljajo kot odgovori na aktualno problematiko. Rezultati raziskav so primerljivi s tujimi izsledki. Za kvalitetno opravljanje svojega dela, naj bi imel tolmač visokošolsko izobrazbo, se posluževal različnih oblik tolmačenja, se prilagajal potrebam gluhih študentov in se predpripravil na predavanja. Tolmač ne more v celoti nadomestiti neposrednega stika med profesorjem in študentom, zato se pojavlja potreba po dodatnih rešitvah, kot so zapisnikarstvo in tutorstvo. Izsledki študije so nakazali specifične težave,

s katerimi se srečujejo tolmači in gluhi študentje v Sloveniji. Te so pomanjkanje kretenj za strokovne izraze, potreba po permanentnem izobraževanju tolmačev in neuresničevanje Zakona o uporabi slovenskega znakovnega jezika s strani univerz.

Ključne besede: znakovni jezik, tolmač znakovnega jezika, tolmačenje znakovnega jezika na fakultetah, visokošolsko izobraževanje gluhih

Abstract

Interpreting Slovenian sign language in higher education of the deaf requires special knowledge and skills. To understand the issue, it is necessary to understand deafness and ways of communication of the deaf. The adoption of the Law on the Use of Slovenian Sign Language has opened the way for a new profession – interpreter for Slovenian sign language. The empirical part of the article deals with the difficulties that interpreters face while working in higher education, the reasons for this and the factors that affect the quality of interpreters' work, as well as strategies and alternative solutions that emerge as response to this issue. The research results are comparable with foreign findings. The interpreter, in order to be able to perform their work well, should have completed higher education, be skilled in various types of interpreting, adjust to the needs of deaf students and prepare for the lectures in advance. The interpreter cannot fully replace direct contact between

professors and students, so there is a need for additional solutions, such as minute-keeping and tutoring. The results of the study have indicated specific problems faced by interpreters and deaf students in Slovenia, namely lack of gestures for terms, the need for permanent education of interpreters and failure of putting into action the Law on the Use of Slovenian Sign Language by universities.

Keywords: sign language, sign language interpreter, interpreting sign language at universities, higher education of the deaf.

Uvod

V članku poskušamo odgovoriti na vprašanja katere kvalitete mora imeti dober tolmač, kako je njihovo izobraževanje urejeno v Sloveniji ter s kakšnimi težavami se srečujejo tolmači in gluhi študentje na področju visokošolskega vprašanja. Natančna raziskovalna vprašanja so zastavljena na začetku empiričnega dela, torej po predstavitvi teoretičnih predpostavk ter odgovorjena v razpravi. V delu analiziramo vso zelo omejeno literaturo, ki je do sedaj na voljo glede te tematike ter izvedemo lastno raziskavo, ki prinaša nove ugotovitve s tega področja.

V teoretičnem delu predstavljamo širše ozadje teme članka, ki je sicer vloga tolmača za slovenski znakovni jezik v procesu visokošolskega

izobraževanja gluhih, ker menimo, da je poznavanje gluhotе in vseh problemov, ki iz nje izvirajo, pri nas na splošno še premalo poznano. V teoretskem delu tako najprej predstavimo gluhotо, posebnosti komunikacije gluhih ter znakovni jezik (v nadaljevanju ZJ) kot najrazvitejšo oblikо komunikacije gluhih.

V drugem delu se posvetimo samemu tolmačenju ZJ. Spregovorimo о zgodovini tolmačenja na Slovenskem in predstavimo Zavod združenje tolmačev za slovenski znakovni jezik (v nadaljevanju ZZTSZJ)-organizacijo, ki pri nas skrbi za izobraževanje, certificiranje tolmačev ter druge naloge. Predstavim tudi širši pravni okvir delovanja tolmačev, ki se je vzpostavil s sprejetjem Zakona о uporabi slovenskega znakovnega jezika (v nadaljevanju ZUSZJ), etične norme njihovega poklica ter njihovo izobraževanje tako v tujini kot tudi pri nas.

Predstavimo tuji študiji, ki raziskujeta specifičnost dela tolmača ZJ v visokošolskem okolju in problematiko razumevanja gluhih v procesu visokošolskega izobraževanja. Prva študija izpostavi predvsem problem izbire načina tolmačenja, saj se na fakultetah uporabljata dobesedno tolmačenje in tolmačenje prilagojeno ZJ s parafraziranjem. Tematizira tudi tolmačevo povezovalno vlogo v konkretnem okolju predavalnice kot tudi v širšem smislu, saj naj bi bil povezovalec dveh jezikov in dveh kultur, večinske kulture slišočih in kulture gluhih. Druga študija obravnava vzroke za slabše razumevanje gluhih študentov v primerjavi s slišočimi vrstniki.

V empiričnem delu kot metodo raziskovanja izberemo kvalitativno analizo, saj je število gluhih študentov v Sloveniji še vedno zelo majhno. Ker je to specifična populacija, s katero najlažje navežeš stik preko individualnega pristopa, analizo izvedemo s polstrukturiranimi odprtimi intervjuji. Vlogo tolmača za SZJ na področju visokošolskega izobraževanja gluhih želimo raziskati z različnih zornih kotov, zato za intervjuvance izberemo dva gluha študenta, dve tolmačici in direktorico ZZTSZJ. Skozi intervjuje želimo izvedeti, ali so tolmači pri nas dovolj usposobljeni za tolmačenje na tem področju, s kakšnimi dodatnimi težavami se srečujejo, kako jih premagujejo, kako gluhi študentje vidijo in ocenjujejo njihovo delo ter prednosti in pomanjkljivosti, ki se pojavljajo pri uresničevanju ZUSZJ.

V razpravi primerjamo izsledke raziskave s tujima študijama, da bi ugotovili, kakšno je stanje pri nas glede na razvoj stroke tolmačenja v tujini, in poskušamo nakazati možnosti nadaljnjega razvoja.

Teoretični del

Gluhota

Gluhote ni mogoče opisati z eno samo definicijo, saj so že vzroki zanjo različni. Nastane lahko že v zgodnji nosečnosti ali se deduje, lahko je

posledica nesreče, poškodbe, bolezni. Po eni izmed definicij, je gluhota opredeljena kot nezmožnost slišati in razumeti govor s slušnim organom. Nekateri gluhe osebe lahko slišijo govor iz okolja, vendar ga ne razločijo in ne razumejo, kar ni dovolj za komunikacijo (Redžepovič, 1995).

Pomemben dejavnik pri definiciji gluhoti je tudi starost, pri kateri je nastopila gluhoti. Za razvoj govora je potreben dober sluh, zato so posledice gluhoti veliko večje, če je nekdo gluh od rojstva ali pa oglušil, ko ima že razvit govor (Redžepovič, 1995). Glede na starost ob izgubi sluha razlikujemo prelingvalno gluhe in postlingvalno gluhe.

Prelingvalno gluhe osebe so gluhe že od rojstva, ali so oglušele do tretjega leta starosti. Če niso bile že dovolj zgodaj deležne surdološke rehabilitacije, kjer bi se naučile izgovarjanja glasov in besed, ostanejo skoraj neme, zato jih nekateri še vedno imenujejo »gluhoneme«, kar je sicer zastarel izraz. Za sporazumevanje z drugimi uporabljajo predvsem znakovni jezik, gib, mimiko in pantomimo (Redžepovič, 1995 in ZDGNS).

Postlingvalno gluhe osebe se bistveno razlikujejo od prelingvalno gluhih oseb, saj so oglušele kasneje v življenju in so pred tem že spontano, s poslušanjem osvojile glasovnojezikovno sporazumevanje, vendar je za njih poleg glasovnojezikovnega sporočanja še vedno odločilen vizualni segment. Ob jasnem sogovornikovem govoru z odpiranjem ust lahko odčitavajo 70 % njegovega sporočila, sicer pa bistveno manj (Redžepovič, 1995 in ZDGNS).

Vpliv gluhotе na emocionalno-socialni razvoj in na razvoj kognitivnih sposobnosti

Da bi se mlad človek lahko normalno razvijal na čustvenem in socialnem področju, da bi pridobil potrebno izobrazbo, potrebuje normalen sluh, saj mu le ta omogoča, da usvoji jezik, s tem da posluša glasove iz okolja, jih posnema, jih na novo sestavlja in ustvarja (Košir, 1999).

V obdobju od rojstva do šestega leta starosti se otroci zlahka naučijo jezika. V tretjem in četrtem mesecu začne blebetati, poslušati svoj lastni glas in ga posnemati. V začetku je njegov govor sestavljen samo iz samostalnikov, ki pa jim kmalu doda še pomožne besede in zatem še stavke. Ko začne duševno zdrav otrok z normalno razvitim sluhom hoditi v šolo, je njegov besedni zaklad sicer še neurejen, vendar že precej razvit. Tudi pri gluhem otroku se pojavi faza blebetanja, vendar ta ne pritegne njegove pozornosti, ker ne vzbudi njegovega slušnega centra in se zaradi tega tudi ne posnema. Ker ne sliši zvokov, odpade cela vrsta impulzov in signalov iz okolja, ki bi sicer spodbujali njegov razvoj (Hribar 1973, str. 74). Izguba sluha vpliva na razvoj jezika in govora. Gluhi otrok se začne izražati z gibi, mimiko in pantomimo. Če je izpostavljen strukturiranemu znakovnemu jeziku, se bo začel izražati v nebesednem jezikovnem sistemu in postal bo uporabnik ZJ (Košir, 1999). Po mnenju nekaterih strokovnjakov bi se moral otrok naučiti ZJ čim bolj zgodaj, ko se še razvijajo njegovi potenciali. Tako bi lažje dohajal svoje slišče

vrstnike na jezikovnem in spoznavnem področju pa tudi na socialnem in čustvenem. Na pomembnost zgodnjega usvajanja jezika kažejo tudi študije jezikovnih sposobnosti, ki so jih naredili v ZDA, iz katerih je razvidno, da so gluhi otroci, ki se zgodaj v otroštvu naučijo ZJ, uspešnejši pri ogledovanju (branju z ust) in bistveno boljši pri uporabi govornega jezika kot gluhi otroci, ki se niso naučili ZJ (Kuhar, 1993). Slabši razvoj govora je vzrok, da gluhi ne razumejo dovolj zakonitosti sveta okoli sebe, težje prihajajo do informacij, njihovi socialni stiki so omejeni in možnost za razvoj različnih psihičnih težav je večja.

Intelektualni potenciali gluhih oseb so primerljivi s slišječimi, vendar so njihovi učni in šolski dosežki bistveno slabši in gluhi so na splošno bistveno manj izobraženi kot slišječji ljudje. Velike razlike je opaziti že pri samem branju in pisanju, saj nerazvit govor (posebej pri prelingvalno gluhih osebah) vpliva na slabše razumevanje napisanega in samo pisanje (Košir, 1999). Pridobivanje akademskega znanja je odvisno od znanja verbalnega jezika, ta je tudi predpogoj za znanje pisnega jezika. Za gluhe posameznike, ki verbalnega govora nimajo razvitega, je način pridobivanja znanja večine neprimeren, saj ne morejo poslušati predavanj, si delati zapiskov in posledično pomanjkljivo razumejo literaturo. Informacije gredo mimo njih ali pa jih dobijo z zamudo, nova strokovna znanja so jim težje dostopna, samozaupanje in iz njega izhajajoča samoiniciativnost je nižja. Vse to prispeva k njihovi slabši izobrazbi (Košir, 1999; Jakopič in Redžepovič, 2006).

Znakovni jezik

SZJ je kompleksen in živ jezik z visoko razvitim manualno-vizualnim načinom izražanja in pripada velikemu številu znakovnih jezikov, ki so razširjeni med skupnostmi gluhih po svetu. Sestavljen je iz znakov – kretenj, ki izražajo pojme z različnimi položaji, gibi rok in telesa, z obrazno mimiko in prstno abecedo. Pri ZJ sicer velja pravilo, da kretanja predstavlja besedo, vendar pa SZJ nikakor nima enakih pravil, kot jih ima slovenski govorni jezik, pač pa ima lastno slovnico in lastna pravila. SZJ ni enak drugim ZJ po svetu. Vsaka država ima svoj ZJ, razlike se vidijo že znotraj iste države, npr. med starejšimi in mlajšimi gluhih (Bauman in drugi, 2009).

Zavod združenje tolmačev za slovenski znakovni jezik (ZZTSZJ)

ZZTSZJ je organiziran kot nevladna neprofitna organizacija, ki v imenu države izvaja javna pooblastila, kamor sodijo vodenje liste tolmačev SZJ, predlog tarife za plačilo tolmačev, zadovoljevanje potreb po tolmačih na ozemlju RS, vodenje evidence opravljenih storitev tolmačenja in sodelovanje v Svetu za SZJ, ki ga je ustanovila Vlada RS za strokovno pomoč pri sprejemanju in pripravi predpisov (O ZZTSZJ).

Poleg tega vodi naloge po zakonu, kot so sodelovanje v strokovnih komisijah pri odločanju o pravici gluhih do tolmača, koordiniranje dela tolmačev, skrb za razvoj SZJ ter opravljanje strokovnih, administrativnih, tehničnih in drugih del za Svet za SZJ. Naloga ZZTSZJ je tudi skrb za razvoj storitev tolmačenja: organiziranje in izvajanje tečajev za SZJ, priprava in izvedba programa usposabljanja za pridobitev poklicne kvalifikacije tolmač/tolmačica SZJ, vodenje postopka certificiranja ter skrb za permanentno izobraževanje tolmačev. ZZTSZJ sprejema pravilnik o disciplinski odgovornosti tolmačev in rešuje ugovore zoper kakovost storitve tolmačenja (O ZZTSZJ).

Zakon o uporabi slovenskega znakovnega jezika (ZUSZJ)

Pomemben mejnik pri uresničevanju pravice gluhih do tolmača je bilo sprejetje ZUSZJ, ki predpisuje način uveljavljanja pravice do tolmača, določa pogoje za tolmače ter predvideva pritožbene postopke v primeru nezadovoljstva gluhe osebe s kvaliteto tolmačenja (Bauman in drugi, 2009).

ZUSZJ določa, da ima gluha oseba pravico uporabljati SZJ v postopkih pred državnimi organi, organi lokalne samouprave, izvajalci javnih pooblastil, oziroma izvajalci javnih služb. Le-ti so dolžni zagotoviti gluhi osebi pravico do tolmača v vseh primerih, ko običajno sporazumevanje gluhi osebi ne omogoča enakopravnega sodelovanja v postopkih. V 12.

členu tega zakona je določeno, da morajo državni organi, organi lokalne samouprave, izvajalci javnih pooblastil in izvajalci javnih služb plačati stroške tolmača za SZJ. Te predvidijo v letnih finančnih načrtih (ZUSZJ, Ur. l. RS, št. 96/2002).

Gluhe osebe imajo pravico do uporabe SZJ tudi v drugih življenjskih situacijah, kjer jih gluhoti ovira pri zadovoljevanju njihovih potreb. To pravico lahko uveljavljajo po lastni presoji v obsegu 30 ur letno, v primeru, da imajo status dijaka ali študenta pa se zaradi dodatnih potreb ta fond zviša na 100 ur letno. Delo tolmača plačajo z vavčerji, plačilo stroškov tolmača krije ministrstvo, pristojno za invalidsko varstvo (13. člen ZUSZJ, Ur. l. RS, št. 96/2002).

Med javne službe spadajo tudi univerze, vendar le-te do sedaj niso bile pripravljene plačevati stroškov tolmačenja, saj oporekajo takšni interpretaciji zakona in interpretirajo predavanja kot življenjsko situacijo, ki si jo študent sam izbere. V praksi morajo zato študentje plačevati stroške tolmačenja na predavanjih z vavčerji, ki jim pokrijejo samo tretjino vseh predavanj, s tem da se morajo odreči vsem svojim ostalim potrebam, ki jih imajo izven predavalnice. Takšnemu načinu razumevanja in izvajanja zakona oporekata tako ZZTSZJ kot tudi pripravljavec zakona MDDSZ, vendar ostaja ta problem zaradi pomanjkanja političnega konsenza še vedno nerešen (Bauman, 2010).

Tolmač znakovnega jezika

Tolmač je ključnega pomena za gluho osebo, saj brez njega komunikacija s sliščo osebo ne more potekati. Po ZUSZJ je tolmač tisti, ki tolmači slovenski govorni jezik v ZJ in obratno (ZUSZJ, Ur. l. RS, št. 96/2002).

Terminološka opredelitev

Termin tolmač ZJ se uporablja v Sloveniji, drugod po svetu sta v rabi tako izraz prevajalec kot tolmač (Pribanić, 2009). Razlika med obema terminoma izhaja iz posebnosti ZJ. Kot smo že omenili, je SZJ prvi in naravni jezik gluhih in je drugačen od slovenščine. Slovenski jezik je za gluhe osebe tuj jezik, ker temelji na glasovnem govoru, za katerega je potreben sluh, medtem ko je pri gluhih najpomembnejši vidni način izražanja (Bauman in drugi, 2009). Zato še vedno obstaja veliko gluhih, ki jim razumevanje slovenščine povzroča težave. Da bi gluha oseba dobila popolno in jasno informacijo, tolmač dodatno pojasnjuje vsebino povedanega in jo prilagaja razumevanju gluhega. V nasprotju s tem prevajalec samo prevaja brez dodatnega pojasnjevanja in prilagajanja prevoda gluhim osebam. Gluhi, ki so uporabniki ZJ za razumevanje povedanega potrebujejo tolmača za dodatno razlago. V situacijah kot so konference in predavanja na univerzi, pri katerih je vsebina gluhim

poznana bolj kot samim tolmačem, je primernejši simultani prevod, ki sledi slovnični strukturi govornega jezika (Pribanić, 2009).

V nadaljevanju uporabljamo izraz tolmač SZJ, tako kot je to določeno z ZUSZJ, s tem da ta termin pokriva oba načina prevajanja. Tolmač mora biti prilagodljiv potrebam osebe, ki ji tolmači ter ji zagotoviti vse želene oblike komunikacije, zato se od njega pričakuje, da je usposobljen za oba načina komuniciranja (Pribanić, 2009).

Sposobnosti, ki jih mora imeti tolmač znakovnega jezika

Proces tolmačenja ni enostaven, saj vključuje vrsto kognitivnih procesov, psiho-socialnih veščin, tehničnih spretnosti in etičnih načel (Pribanić, 2009).

Za tolmače ZJ je pomembno, da imajo dober sluh. Tolmačenje predavanj, raznih diskusij, sestankov itd. zahteva odličen sluh, saj mnogi govorniki nimajo jasne izgovorjave ali govorijo tiho, kar je pri samem tolmačenju lahko zelo moteče. Če takega govornika tolmači tolmač, ki slabo sliši, je njegovo tolmačenje nepopolno, nepovezano in netočno, izgublja se rdeča nit povedanega, kar je obremenjujoče tako za gluhega kot za tolmača. Tolmača mora imeti tudi dobro razvit vizualni in slušni spomin. Vizualni spomin omogoča hiter uvid v značilnosti kretenj, dober slušni spomin pa je potreben, da si zapomni povedane stavke, ki so lahko

tudi kompleksnejši, kot tudi različne intonacije, ki določajo pomen povedanega. Tolmač poleg kretenj gestikulira z usti in mimiko obraza. Pri tem mora biti njegov gestikulacijsko-mimični govor jasen in točen, tako da se ga lahko razume tudi z večje razdalje. Sposoben mora biti hitrega izražanja raznih duševnih stanj, ki jih pokaže z mimiko obraza. Ker so za delo tolmača zelo pomembne roke, morajo biti njegove roke brez okvar, z gibkimi prsti na obeh rokah. Poleg gestikulacije in mimike uporablja tudi prstno abecedo, ki je lahko enoročna ali dvoročna. Uporablja jo za besede, za katere ne pozna kretenj, ali pa za tiste besede, za katere kretnje ne obstajajo (Centar za rehabilitacijo gluhih, 1969).

Eden izmed pogojev za uspešno delo tolmača je tudi njegova splošna izobrazba, ki mu pomaga, da različne vsebine, s katerimi se srečuje pri svojem delu, lažje in boljše tolmači. Poleg tega se mora pred zahtevnejšim tolmačenjem (npr. pred predavanjem na univerzi) seznaniti z vsebino, ki jo bo tolmačil (Centar za rehabilitacijo gluhih, 1969).

Tolmač mora dobro poznati oba jezika, tako znakovnega kot tudi govornega, se stalno izpopolnjevati in nadgrajevati že osvojeno znanje, bogatiti splošno izobrazbo in spoznavati kulturo gluhih. Pomembno je tudi, da stalno preverja kvaliteto svojega dela ter skrbi za lastno psihično in fizično zdravje (Terezay,2009).

Po ZUSZJ (Ur. List RS, št. 96/2002) »je tolmač za ZJ polnoletna oseba, ki ji je bil izdan certifikat v skladu s predpisi nacionalne poklicne kvalifikacije,

in je vpisana v *Register tolmačev za slovenski znakovni jezik*. Tolmači so dolžni pri svojem delu spoštovati *Kodeks poklicne etike za tolmače*.«

Kodeks poklicne etike za tolmače SZJ

Gluhe in težje naglušne osebe so s svojim načinom komuniciranja, stališči, vrednotami in izkušnjami pripadniki kulturne manjšine, primerljivi z drugimi manjšinami (Bauman in drugi, 2009). Zaradi svoje komunikacijske ovire so v podrejenem položaju, saj predstavlja sposobnost komunikacije v jeziku večine moč za tistega, ki to sposobnost ima. Gluhi lahko vzpostavijo komunikacijo s sliščim svetom s pomočjo tolmača, ki je pripadnik dominantne skupine. Prav zaradi komunikacijske prednosti, ki jo tolmač ima, lahko prihaja do zlorabe moči. Zato je zelo pomembno, da so tolmači ZJ zavezani kodeksu poklicne etike (Terezay, 2009).

Kodeks poklicne etike vsebuje norme integritete, zaupnosti in profesionalnosti, po katerih se morajo ravnati tolmači SZJ. Tolmače, ki kršijo določila kodeksa, obravnava Častno razsodišče pri Združenju tolmačev in glede na vrsto in intenzivnost kršitve izreka ustrezne ukrepe (15. člen Kodeksa poklicne etike za tolmače SZJ).

Kandidat za tolmača SZJ svoje znanje dokaže z uspešno opravljenim izpitom pred Državno izpitno komisijo, kar pa ne pomeni, da je

usposobljen za tolmačenje vseh vsebin, ki se mu ponudijo na njegovi karierni poti. Zato mora biti dovolj samokritičen, da sam oceni, ali bo sposoben v konkretni zadevi uspešno opraviti svoje delo, ali predlaga, da se angažira drugega tolmača. Če to ni možno, opravi svoje delo po svojih najboljših zmožnostih in vesti. Za njegovo uspešno delo je pomembno, da že pred začetkom tolmačenja zbere čim več informacij o vsebini, ki jo bo tolmačil, ter se z gluho osebo dogovori, kateri način komunikacije ji najbolj odgovarja (jezik gluhih, simultana komunikacija, prstna abeceda, pisanje, risanje, parafraziranje) (Terezay, 2009 in Kodeks poklicne etike za tolmače).

Tolmač posega pri svojem delu na zelo intimna področja življenja gluhe osebe, sliši stvari, ki jih gluha oseba ne bi delila z nikomer, če bi slišala. Zato je zavezan k molčečnosti; informacije, še posebej tiste, ki se nanašajo na osebno sfero gluhega, ne smejo biti predmet debate med kolegi – tolmači, drugimi uporabniki ali prijatelji (Terezay, 2009 in Kodeks poklicne etike za tolmače). Da lahko gluha oseba enakopravno sodeluje v izmenjavi informacij, mora tolmač zagotoviti, da je vsem udeležencem jasno, kaj je bilo povedano. Pri svojem delu mora biti profesionalen in nepristranski in znati postavljati mejo med morebitnim prijateljstvom med njim in gluho osebo in profesionalnostjo. V kolikor to ni mogoče, ne sprejme tolmačenja (Pribanić, 2009 in Kodeks poklicne etike za tolmače).

Tolmačeva dolžnost je, da z vedenjem in profesionalnostjo skrbi za svoj ugled, ugled Združenja tolmačev ter da ima spoštljiv odnos do ZJ. Pri svojem delu mora biti profesionalen ter urejen – priporočajo se

nevpadljiva temna enobarvna oblačila, ki ne smejo odvrnati pozornosti od njegovih rok in gibov (Centar za rehabilitacijo gluhih, 1969 in Kodeks poklicne etike za tolmače).

Kodeksi poklicne etike se razlikuje od države do države in odražajo značilnosti različnih družb in njihovih kultur. Vendar se večina etičnih kodeksov drži temeljnih načel, ki vključujejo obveznosti in smernice za ta poklic in definirajo pogoje v odnosu tolmača do gluhega in do njegovega dela. Skupno vsem kodeksom je, da naj bi bil tolmač vreden zaupanja in čustveno zrel (Terezay, 2009 in Kodeks poklicne etike za tolmače).

Izobraževanje tolmačev

Poleg etičnih načel, ki so temelj tolmačevega dela, je nujno potrebna tudi primerna strokovna usposobljenost. Poklic tolmač ZJ je relativno mlada stroka. Do nedavnega so tako pri nas kot v svetu gluhih tolmačile osebe, ki so jim bile blizu. Največkrat so bili to otroci gluhih staršev, imenovani tudi CODA (Children of Deaf Adults), katerih materni jezik je bil ZJ. Od šestdesetih let naprej so se najprej v ZDA, kasneje pa tudi drugod po zahodnih državah standardi znanja tolmačenja zviševali. Začelo se je sistematsko izobraževanje tolmačev ZJ (Pribanić, 2009).

Zgledi izobraževanja tolmačev po svetu

Prvo formalno izobraževanje tolmačev ZJ se je začelo leta 1964 v Združenih državah Amerike z ustanovitvijo Registra tolmačev znakovnega jezika za gluhe (Registry of Interpreters for the Deaf - RID) pri Ball State University v Indiani. Ta organizacija ima tudi danes ključno vlogo pri vzpostavljanju nacionalnih standardov strokovnih znanj in spretnosti, saj usposablja prevajalce in tolmače ZJ in jih certificira (Pribanić, 2009).

Register tolmačev za gluhe (RID) zvišuje izobrazbene pogoje za pridobitev diplome, saj se od leta 2012 zahteva univerzitetna izobrazba. Že diplomirani tolmači z nižjo izobrazbeno stopnjo morajo do leta 2016 pridobiti univerzitetno izobrazbo. V organizaciji RID zahtevajo od diplomiranih tolmačev permanentno izobraževanje. Vsak diplomirani tolmač mora v ciklu 4 let obvezno nameniti 80 ur izobraževanju, če želi obdržati diplomu. Svoje znanje izpopolnjuje in nadgrajuje na teoretičnem in praktičnem področju. Vsa izobraževanja, ki se jih udeležujejo diplomirani tolmači, se dokumentirajo in so jim na voljo kot reference na karierni poti. S permanentnim izobraževanjem tolmači zbirajo kreditne točke, ki si jih lahko pridobivajo na različne načine: z udeležbo na izobraževanjih, ki jih organizira RID, z udeležbo na predavanjih na fakultetah s področja splošnih lingvističnih in kulturnih študij ali teoretičnih in praktičnih študij iz ZJ, z izbiro specializiranih študij, ki vključujejo tolmačenje v različnih situacijah, z udeležbo na

predavanjih iz drugih splošnih znanosti. Tolmači imajo tudi možnost, da v dogovoru z RID-om sami organizirajo izobraževanje, pišejo članke, opravijo raziskave (The integrity of RID Certification requires a commitment to life-long learning).

Pridobitev poklica tolmača je možna tudi v nekaterih evropskih državah, med katerimi sta tudi Velika Britanija in Slovenija. V Veliki Britaniji poteka usposabljanje za pridobitev poklica tolmač/tolmačica ZJ na podiplomski ravni in traja različno dolgo, od dveh do treh let. Posebnost njihovega programa je ta, da študentje v času svojega izobraževanja opravljajo prakso v organizacijah, ki delajo na področju gluhotе, ali si izberejo študij v tujini pri partnerskih univerzah. Četrto leto imajo študentje možnost, da sodelujejo s profesionalnimi tolmači. Po štirih letih izobraževanja in usposabljanja diplomirajo iz britanskega ZJ in se vpišejo v register tolmačev (British Sign Language Interpreting; Translating and Applied Language Studies).

V Veliki Britaniji preverja znanje in vodi register tolmačev za ZJ (The National Registers of Communication Professionals working with Deaf and Deafblind People, v nadaljevanju NRCPD).

Če želijo tolmači obdržati svoj profesionalni naslov, morajo vsako leto določiti svoje profesionalne razvojne cilje, jih uresničevati in preko računalniškega sistema dokazovati organizaciji NRCPD. Na podlagi teh dokazil organizacija vodi in svetuje svojim članom smernice razvoja (Revalidation).

Izobraževanje tolmačev v Sloveniji

Leta 2002 prizna ZUSZJ hkrati s pravico gluhih do tolmača uradno ta poklic. Pred tem je usposabljanje in preverjanje njihovega znanja potekalo na interni ravni v okviru aktivnosti ZDGNS. Tedanje aktivnosti tolmačev so se odvijale na društveni, civilno-družbeni ravni, vendar pa storitev ni bila enako dostopna vsem gluhim v državi. Na pobudo Združenja tolmačev so poklic tolmača uvrstili v sistem nacionalnih poklicnih kvalifikacij (Holec 2009 in Poklicna kvalifikacija tolmač).

ZZTSZJ izvaja postopek certificiranja po merilih, ki so določeni s *Katalogom standardov strokovnih znanj in spretnosti*, kot je z *Zakonom o nacionalnih poklicnih kvalifikacijah* urejeno za vse poklicne kvalifikacije (Zakon o nacionalnih poklicnih kvalifikacijah, Ur. l. RS, št. 1/07, uradno prečiščeno besedilo in 85/0).

Poleg certificiranja kandidatov za tolmače vodi ZZTSZJ tudi program usposabljanja. Do leta 2013 je ta program trajal eno šolsko leto, oz. devet mesecev, v šolskem letu 2013/14 pa se je podaljšal na dve leti. S tem se je Slovenija približala programu usposabljanja v Veliki Britaniji in ZDA s to razliko, da tam od kandidatov za tolmače zahtevajo kot pogoj zaključeno univerzitetno izobrazbo, medtem ko je v Sloveniji še vedno dovolj srednješolska izobrazba. Slovenski standardi za pristop k certificiranju so primerljivi s tistimi v tujini. S pogovorom ugotavljajo socialne in psiho-fizične lastnosti, kot so »strpnost, nepristranskost,

veselje do dela z ljudmi, empatija, spoštovanje človekovega dostojanstva, sprejemanje različnosti, čustvena in osebna stabilnost, sposobnost razmejevanja med osebnimi in delovnimi problemi.« Potrebno je tudi zdravniško potrdilo o ustreznem zdravstvenem stanju (Program usposabljanja za pridobitev poklica tolmač/tolmačica SZJ).

Usposabljanje kandidati zaključijo z izpitom pri Državni izpitni komisiji in si tako pridobijo poklic tolmač/tolmačica SZJ (Program usposabljanja za pridobitev poklica tolmač/tolmačica SZJ).

V Sloveniji je trenutno registriranih 47 tolmačev SZJ (Interni viri ZZTSZJ, 2015).

Vloga tolmača v procesu visokošolskega izobraževanja gluhih

S sprejetjem ZUSZJ in z njim pravice do tolmača, se je povečalo tudi število gluhih študentov, saj imajo sedaj več možnosti, da uspešno zaključijo študij. V tujini se je proces vključevanja gluhih v visokošolski študij začel že desetletja prej. Medtem ko so v 50-ih in 60-ih letih le redki gluhi posamezniki študirali izven izobraževalnih ustanov za gluhe, je bilo v študijskem letu 1999/2000 v ZDA na različne fakultete vpisanih 23.000 gluhih študentov (Marschark, in drugi, 2005). S porastom števila gluhih študentov na fakultetah se je povečala potreba po tolmačih.

Tolmač je tisti, ki naj bi zagotavljal izobraževanje gluhih študentov v jeziku, ki je za njih najprimernejši, in omogočal njihovo sodelovanje s profesorji in sošolci (Giles, 2000). Raziskovalci opažajo, da predstavlja tolmačenje v univerzitetnem okolju velik izziv tako za tolmača kot tudi za gluhega študenta. Napier (2004) v svoji študiji prouči vse dejavnike, ki vplivajo na proces tolmačenja. Eden izmed ključnih pogojev je univerzitetna izobrazba tolmačev, saj jim je tako akademski diskurz bližji. Tolmač je posrednik med dvema kulturama in jezikoma, zato mora oboje čim bolje poznati. Pri svojem delu na univerzi mora upoštevati neposredno okolje, udeležence predavanja, prepoznati mora bistvene točke profesorjevega sporočila in način njegovega predavanja. Upoštevati mora tudi norme akademskega okolja. Vsi ti dejavniki vplivajo na njegov način prevajanja. Tolmač naj bi bil prilagodljiv glede na kontekstualne in situacijske različnosti. Če tolmač nima univerzitetne izobrazbe, se postavlja vprašanje o strategijah, ki jih lahko uporabi, kadar deluje v njemu nepoznanem okolju. Besedila, ki se govorijo na univerzah, se zgledujejo po pomensko zelo zgoščenih, pisnih tekstih in predstavljajo za tolmača dodaten izziv, saj gluhemu študentu pisni jezik ni tako blizu, kot je slišičim študentom. Tolmač mora dešifrirati pomen teksta in se v trenutku odločiti, katere besed bo izpostavil in na kakšen način jih bo tolmačil (Napier, in drugi, 2004).

Nemogoče je, da bi tolmač obvladal vsa področja, na katerih tolmači. Zaradi raznolikosti predmetov na univerzah je pogosto primoran tolmačiti predmete nepoznane vsebine včasih povsem nepripravljen. V primeru, ko je njegov izobrazbeni nivo nižji od stopnje, za katero naj bi

tolmačil, naj dela ne bi sprejel. Tolmač naj bi sodeloval s profesorjem in tako dobil jasno sliko o vsebini, se seznanil s terminologijo in ciljem predavanja. Ker to največkrat časovno ni uresničljivo, je tolmačeva naloga, da si priskrbi zapiske predavanj (Giles, 2000). Čeprav je predpriprava pogoj za uspešno tolmačenje, je poleg tega zelo pomemben tudi odnos, ki ga tolmač vzpostavi s profesorjem, da mu le-ta v kočljivih situacijah lahko priskoči na pomoč, npr. ponovi že povedano.

Dodatne aktivnosti tolmača na univerzah so tolmačenje na vajah, seminarjih in pri drugih aktivnostih, ki se jih študent udeležuje v okviru svojega študija. Idealno bi bilo, če bi se tolmači na fakultetah menjali glede na svojo specializacijo (Napier in drugi, 2004).

Tolmač se mora zavedati svoje vloge v izobraževalnem okolju in dejstva, da so gluhi študentje v slabšem položaju od slišočih študentov. Vsi študentje, tudi slišočji, so lahko brez predznanja o določeni snovi. Tolmač se sooča z nalogo, kako poskrbeti za prevod, ki bo jezikovno in kulturno prilagojen gluhemu študentu, s tem da bo vključeval pomenske ekvivalente iz ZJ. Hkrati mora omogočiti gluhemu študentu dostop do specializirane terminologije, ki mu bo omogočila razumevanje predmeta in pomagala pri opravljanju izpitov (Napier in drugi, 2004).

Tolmač se odloča za način tolmačenja glede na poznavanje gluhega študenta, njegovega znanja jezika, tako znakovnega kot govornega, in tudi svojega in študentovega poznavanja predmeta tolmačenja. Napier (2004) izpostavi dva stila tolmačenja, simultano tolmačenje in

tolmačenje v jeziku gluhih. Simultano tolmačenje ali dobesedni prevod sledi izvorni jezikovni strukturi teksta, medtem ko je tolmačenje v jeziku gluhih proces, pri katerem se koncepti in pojmi tolmačijo iz enega jezika v drugega. Pri tem se vključuje kulturne norme in vrednote gluhe manjšine, znanje o teh vrednotah in tudi iskanje jezikovnih in kulturnih ekvivalentov. Nekateri avtorji menijo, da je na univerzah najprimernejše dobesedno tolmačenje, saj naj bi s tem gluhemu študentu omogočili dostop do akademskega govornega jezika. Tako naj bi pri vsebinah, ki imajo veliko strokovne terminologije, tolmač uporabljal dobesedni prevod s pomočjo artikulacije in prstne abecede. Avtorica te študije zagovarja tako tolmačenje po gluho kot tudi dobesedni prevod (Napier in drugi 2004).

Tolmači imajo povezovalno vlogo pri interakciji gluhih študentov z ostalimi udeleženci predavanja, tako profesorjem kot tudi slišječimi kolegi. Gluhi študentje so večkrat izločeni iz interakcije v predavalnici in pri tem doživljajo občutke osamljenosti in nerazumljenosti. Da bi se gluhi študentje čim bolj socialno integrirali in s tem lažje vključili v proces izobraževanja, mora tolmač tolmačiti, kar vpraša ali pove študent profesorju ali ostalim študentom in obratno. Na ta način tolmač povezuje vse udeležence in doseže, da se gluhi študent počuti enakovrednega (Giles, 2000). To predstavlja dodaten izziv za tolmača, saj se mora, npr. pri diskusijah, odločati, kaj bo tolmačil, kajti istočasno ne more vsega (Napier in drugi, 2004).

Učinkovitost tolmačenja na fakulteti

Zgoraj obravnavana študija izpostavi predvsem zahteve, katerim mora zadostiti tolmač, da bi uspešno opravljal svoje delo v univerzitetnem okolju. Študija, ki sledi, pa kaže na to, da samo tolmač še ne more zadostiti vsem potrebam, ki jih imajo gluhi študentje.

S pravico do tolmača in tolmačenja predavanj se je povečalo število gluhih študentov tako v ZDA kot tudi drugod v Zahodnem svetu. Še vedno je premalo raziskav o tem, kako so študentje pripravljene na tolmačenje na fakultetah in če jim samo tolmačenje predavanj nudi enako dostopnost do znanja, kot ga imajo njihovi slišiči vrstniki. Redke raziskave na to temo dokazujejo nasprotno (Marschark in drugi, 2005). Gluhi študentje se razlikujejo od slišičih študentov po tem, da so si med seboj zelo heterogeni. Ker ima velika večina gluhih študentov slišiče starše, imajo lahko nekateri pomanjkljivo znanje ZJ in tudi govornega jezika, kar pomeni slabšo pripravljenost na univerzitetno okolje v primerjavi s slišičimi vrstniki. Marschark (2005) omenja različne študije, ki so jih naredili, da bi ugotovili, koliko so gluhi študentje razumeli tolmača in kaj so se naučili. V teh študijah so upoštevali različne dejavnike, ki bi lahko vplivali na proces razumevanja gluhih študentov. Tako so bili vključeni podatki o stopnji znanja znakovnega kot tudi govornega jezika pri gluhih študentih, demografski podatki o tem, iz kakšnih družin prihajajo ti študentje (ali so otroci gluhih ali slišičih staršev, kdaj so oglušeli), njihove preference glede načina tolmačenja.

Primerjali so tudi njihovo razumevanje glede na to, ali je bila vsebina podana v ZJ ali v pisni obliki. Rezultati teh študij so proti pričakovanjem pokazali, da razumevanje gluhih ni toliko odvisno od zgoraj naštetih dejavnikov. Nekoliko boljše rezultate pri razumevanju so dosegli samo gluhi študentje, ki jim je bil ZJ materni jezik, ko jim je bilo predavanje tolmačeno po gluho. Ena izmed pomembnejših ugotovitev je bila, da na razumevanje tolmačenja vpliva tudi kompleksnost interakcije med gluhim študentom, tolmačem in samim okoljem. Vendar avtor ugotavlja, da so se dosedanje študije izogibale primerjanju gluhih študentov s slišječimi in so bolj poudarjale raziskovanje razlik med gluhih samimi. Zato je izvedel študijo, v kateri je poskušal združiti vse idealne pogoje (visokokvalificiran, izkušen tolmač, dobra navezava med gluhim študentom in tolmačem itd.). Želel je ugotoviti, ali bodo rezultati razumevanja gluhih študentov primerljivi s slišječimi in ali »idealno« tolmačenje omogoča gluhim študentom resnično enakovreden dostop do znanja. Rezultati so pokazali, da je bilo razumevanje gluhih očitno nižje od slišječih. Tudi če so bili prisotni izkušeni in visokokvalificirani tolmači, ki so se predhodno seznanili z gluhih študenti in njihovimi potrebami in se jim poskušali prilagoditi, gluhi niso dobili istega znanja kot slišječi. Rezultate poskuša pojasniti s slabo predhodno izobrazbo gluhih, saj je že sam osnovnošolski in srednješolski izobraževalni sistem slabo prilagojen njihovim potrebam in jim da premalo predznanja, da bi se lahko enakovredno vključili na visokošolsko raven. Drugi vzrok vidi v dejstvu, da kakršnokoli podajanje informacij preko posrednika ni primerljivo z direktnim stikom profesorja s študentom. Zavzema se za

nadaljnje raziskave, ki bi prispevale k boljšemu razumevanju pomena dodatnih podpornih dejavnosti, kot sta zapisnikarstvo in tutorstvo, ki bi študij razširile izven predavalnic. Velika verjetnost je, da na učenje vplivajo tudi psihološki dejavniki, in sicer občutek pripadnosti, motiviranosti in udobja, ki bi v bodoče lahko postali predmet raziskav (Marschark in drugi, 2005).

Marschark ugotavlja, da so prejšnje študije z zanemarjanjem primerjanja pridobljenega znanja med gluhi in slišječimi študenti posredno diskriminirale gluhe študente, ker so s tem prispevale so k neprepoznavanju njihovih realnih potreb. S svojo študijo je pripomogel k enakovrednejšemu obravnavanju gluhih študentov (Marschark in drugi, 2005).

Empirični del

Razvidno je, da se v tujini že raziskuje na temo tolmačenja na področju visokošolskega izobraževanja gluhih. Ker smo v Sloveniji šele pred kratkim začeli pravno uresničevati pravice gluhih do enakih možnosti tudi pri izobraževanju in je število gluhih študentov še vedno zelo nizko, takšnih raziskav pri nas še ni. Kljub temu da se po številu gluhih na univerzah ne moremo primerjati z ZDA, pa se srečujemo s primerljivimi težavami, ki jih z raziskavo želim osvetliti.

Opredelitev raziskovalnega problema

Področje raziskave je manjšina gluhih. Problem, ki ga želimo izpostaviti je dostopnost do visokošolske izobrazbe s pomočjo tolmača za SZJ. S sprejetjem ZUSZJ in z njim pravice do tolmača imajo gluhi študentje več možnosti, da uspešno zaključijo študij. Glede na to, da ima tolmač v izobraževalnem procesu gluhih veliko vlogo, želimo raziskati zahtevnost njegovega dela, njegovo profesionalno usposobljenost ter opredeliti težave, s katerimi se srečuje pri svojem delu. Zanima nas tudi, v kolikšni meri se po ZUSZJ zajamčena pravica uresničuje v praksi in s kakšnimi težavami se srečujejo gluhi študentje.

Raziskovalna vprašanja

Naslednja raziskovalna vprašanja naj bi osvetlila raziskovalni problem:

- Katera znanja in veščine potrebujejo tolmači SZJ za kvalitetno tolmačenje gluhim študentom?
- Kako je v Sloveniji urejeno izobraževanje tolmačev in ali jim omogoča pridobitev ustreznih kompetenc tudi za tolmačenje gluhim študentom na fakultetah?
- S kakšnimi težavami se srečujejo tolmači za SZJ na področju visokošolskega izobraževanja gluhih?

- V kolikšni meri ZUSZJ uresničuje pravico gluhih študentom do tolmača?
- S kakšnimi izkušnjami se srečujejo gluhi študentje na področju visokošolskega izobraževanja?

Cilji raziskave

Zanimajo nas dejavniki, ki vplivajo na delo tolmača na področju visokošolskega izobraževanja gluhih glede na njegovo splošno izobrazbo, potrebna specialna znanja, veščine in lastnosti in glede na specifičnost univerzitetnega okolja. Želimo tudi ugotoviti, kje in zakaj prihaja do največjih težav ter kakšne so možnosti za njihovo reševanje.

Poleg dejavnikov, ki vplivajo na samo delo tolmača, želimo raziskati tudi širše, zunanje dejavnike, ki vplivajo na proces izobraževanja gluhih študentov (slabo predznanje gluhih študentov, neplačevanje stroškov tolmačenja s strani univerz).

Metodologija: strategija, obseg in metoda raziskovanja

Zaradi maloštevilnosti gluhih, ki so vključeni v visokošolsko izobraževanje, izberemo kvalitativno raziskavo, ki nudi možnost

poglobljenega uvida v problematiko. saj nam lahko odpre nova problemska polja, osebni stik pa omogoči, da z zaznavo čustvenih stanj intervjuvancev dobimo dodatne vpoglede v raziskovano področje (Mesec, 1989).

Kot metodo raziskovanja uporabimo polstrukturirani odprti intervju, saj so gluhi specifična populacija, s katero najlažje navežeš stik z individualnim pristopom. Glede na problem, ki ga proučujemo, želimo z izborom intervjuvancev predstaviti različne zorne kote. Svoj pogled na problematiko predstavita dve tolmačici z izkušnjami tolmačenja na fakultetah, dva gluha študenta in direktorica ZZTSZJ, ki skrbi za certificiranje in nadaljnje izobraževanje tolmačev.

Vprašanja za intervjuje so pripravljena vnaprej glede na temo, ki nas zanima, s tem da jih puščamo še vedno dovolj odprta, da intervjuvancu dajo možnost, da se razgovori o aktualni problematiki, hkrati pa imamo tako tudi sami možnost, da postavimo podvprašanja glede na razvoj intervjuja (Mesec 1998; Tratnik 2002).

Intervjuja s tolmačicami naredimo v letu 2011, intervjuje z direktorico ZZTSZJ in gluhima študentoma pa v aprilu 2014.

Intervjuje s tolmačicama in direktorico ZZTSZJ posnamemo in naredimo transkript, pri intervjujih z gluhima študentoma snemanje zaradi njunega načina komunikacije ni možno, zato si njune odgovore na zastavljena vprašanja zapišemo.

Postopek kodiranja

Besedilo intervjujev prepíšemo, uredimo in po postopku odprtega kodiranja razčlenimo na sestavne dele, iz katerih dobimo enote kodiranja – pojme, ki jih povežemo z deli besedila. Besedilo, ki je povezano z ustreznim pojmom, ločimo od ostalega besedila s tem, da ga obarvamo z določeno barvo, in tako organiziramo podatke. Pojme združimo v višje abstraktne enote – kategorije, ki jih nato interpretiramo s pomočjo pripadajočih pojmov (Mesec, 1998).

Kot pomoč pri medsebojnem povezovanju kategorij in oblikovanju teorije uporabimo paradigmatski model, ki sta ga izdelala Glaser in Strauss. Glaser - Straussova shema kategorije razvrsti v domnevne odnose in tako oblikuje začasni teoretični okvir. Kategorije so povezane po naslednjem vrstnem redu: *vzročni pogoji* → *pojav* → *kontekst* → *intervenirajoči pogoji* → *strategije akcije ali interakcije* → *posledice* (Mesec, 1998).

Po Mesecu je *pojav* osnovna kategorija tega modela, vse druge kategorije se navezujejo na to osrednjo kategorijo. Ker je osrednja tema članka tolmač za SZJ na področju visokošolskega izobraževanja gluhih in težave, s katerimi se srečuje pri svojem delu, za *pojav* izberemo kategoriji Izkušnje tolmačev in Potrebno znanje, veščine in lastnosti tolmačev. *Vzročni pogoji* so dogodki ali pojavi, ki vodijo do osrednjega *pojavnega*. Sem spadata kategoriji Prednosti in slabosti sprejetega ZUSZJ in

Ustreznost izobrazbe. *Kontekst* predstavlja širše pogoje, v katerih se dogaja vzročno-posledični odnos in ga predstavljajo kategorije Predznanje študentov, Interakcija gluhih študentov s sošolci in profesorji ter Splošna organizacija dela tolmačev. *Intervenirajoči pogoji* spreminjajo začetne pogoje. Menimo, da izobraževanje tolmačev bistveno prispeva k izboljšanju visokošolskega izobraževalnega procesa gluhih, zato izberemo kot *intervenirajoči pogoj* kategorijo Izobraževanje tolmačev. *Strategije* so posledica osrednjega pojava, v našem primeru predstavlja to kategorija Reševanje težav, povezanih s specifičnim delom tolmača, *posledice* pa so namerni ali nenamerni rezultati teh *strategij*. Za *posledico* izberemo kategorijo Alternativne rešitve, ki sicer ne ustreza popolnoma temu paradigmatskemu modelu, saj ne opisuje nekih konkretnih posledic, pač pa nakazuje možnost nadaljnjega razvoja na tem področju (Mesec, 1989).

Interpretacija rezultatov

Spremembe po sprejetju ZUSZJ

S sprejetjem ZUSZJ se je gluhim osebam izboljšala kvaliteta življenja, saj jim je zajamčena pravica do tolmača olajšala dostop do informacij tako v javnem družbenem življenju kot tudi na privatnem področju. Zakon se tudi v praksi uresničuje, čeprav se zaradi nepoznavanja ZJ in problema

gluhote še vedno dogaja, da ponekod, kot npr. v zdravstvu, zavračajo tolmača.

Z zakonom se je začel uveljavljati tudi nov poklic tolmač/tolmačica SZJ ter sistemsko usposabljanje zanj. Pred tem je delo tolmačev potekalo v okviru društvenih dejavnosti in bilo prilagojeno takratnim razmeram. Danes je njegovo delo visoko kvalificirano, saj nastopa npr. na TV oddajah, seminarjih, konferencah, na visokošolskih ustanovah.

To, da lahko gluhi študent spremlja predavanja pretolmačena v SZJ, je pomemben korak k izboljšanju dostopa do izobraževanja za gluhe. Pred tem gluhi študentje niso imeli možnosti, da bi razumeli vsebino predavanj in vaj, počutili so se osamljene in odrinjene in zaradi vseh teh težav je redko komu uspelo končati študij. O tem pove gluhi študent v intervjuju naslednje: »Kot sem že povedal, je bil moj največji problem, da nisem razumel vsebine predavanj. Tudi s sošolci se nisem družil, saj oni niso razumeli mene, jaz pa njih ne. Počutil sem se osamljenega in odrinjenega.«

V Sloveniji usposablja in vodi postopek certificiranja tolmačev ZZTSZJ. S certifikatom pridobi tolmač osnovno znanje. Zaradi obilice novih pojmov, s katerimi se srečuje pri svojem delu, prihaja do zahteve po nadgradnji znanja.

Gluhi študentje imajo na račun tolmačevega dela veliko pohval, po njihovem mnenju so tolmači odlični in večinoma dobro pripravljeni,

vendar hkrati poudarjajo, da je njihova dolžnost redno permanentno izobraževanje, samoizobraževanje in učenje novih kretenj.

Posebnosti tolmačenja v visokošolskem okolju

Ker se del pravice iz zakona nanaša tudi na dostopnost do tolmača na univerzah, so se začela pojavljati številna nova vprašanja, ki so specifična prav za to področje.

Po izkušnjah tolmačev kot tudi gluhih študentov je tolmačenje na fakultetah za tolmača zelo zahtevno in naporno. Srečuje se s specifičnimi vsebinami, ki so zanj večinoma nove. Pogosto mu manjkajo kretnje za strokovne izraze, saj SZJ ne sledi slovenščini. Zgodi se, da gluhi študent ne pozna področja predavanja, kar dodatno oteži delo tolmača, saj mora celotno vsebino parafrazirati, in če sam te vsebine ne pozna, je njegovo delo še težje. V primeru, da ima študent predznanje o vsebini in razume strokovne izraze, lahko tolmač prevaja dobesedno. Za uspešno tolmačenje ZJ je zelo pomembno, da tolmač dobro pozna gluho osebo, njeno znanje slovenščine in ZJ ter tudi predznanje s področja, ki se tolmači, kajti le tako se lahko prilagodi potrebam gluhega. V primerjavi s prevajalcem tujega jezika se mora tolmač SZJ nenehno ukvarjati s tem, koliko gluha oseba dejansko razume vsebino povedanega, kar prispeva k njegovi dodatni obremenjenosti. K utrujenosti prispeva tudi celodnevno tolmačenje različnih vsebin. Iz intervjuja lahko razberemo tudi, da gluhi

študent opazi njegovo preobremenjenost in mu skuša olajšati delo s tem, da mu ne postavlja dodatnih vprašanj.

Da bi tolmač dobro opravljal svoje delo na tako zahtevnem področju kot je visokošolsko izobraževanje gluhih, mora pridobivati in razvijati določena znanja, veščine in lastnosti.

Za poklic tolmač/tolmačica SZJ se navadno odločajo ljudje, ki imajo visoko afiniteto do drugačnosti, razvito empatijo ter zanimanje za ZJ. Ker je delo tolmača SZJ za razliko od drugih prevajalcev vezano na primerno interakcijo z gluho osebo, se od njega pričakuje velika stopnja zrelosti in odgovornosti. Glede na to, da je gluha skupnost zelo majhna in da tolmač pri svojem delu posega tudi na intimna področja gluhe osebe, naj tega zaupanja ne bi izkoristil. Ker predstavlja tolmač gluho manjšino in jo povezuje s slišočim svetom, je zelo pomembno, na kakšen način bo to svojo vlogo odigral.

Na fakulteti tako predstavlja vez med gluhim študentom in profesorji kot tudi slišočimi sošolci. Včasih mora prekiniti profesorja, če vidi, da gluhi študent ni razumel vsebine predavanj. Ker je gluhi študent v veliki meri vezan na tolmačevo pomoč, je zelo pomembno tudi tolmačevo razpoloženje. Dobro razpoložen tolmač povedano snov bolj zanimivo pretolmači in s tem dodatno motivira študenta pri študiju. Gluhi študentje cenijo pri tolmaču, da le-ta profesionalno opravi svoje delo, obenem pa da se zna sprostiti in prijateljsko poklepetati. Vsa moralna in

etična načela, ki naj bi jih tolmač spoštoval pri svojem delu, so zapisana v *Kodeksu poklicne etike za tolmače*.

Poleg zgoraj omenjenih psihičnih lastnosti mora tolmač razviti tudi znanja in veščine povezane s tehnikami tolmačenja, ki so najprimernejše za visokošolsko okolje. Pri svojem delu na fakulteti uporablja dva načina tolmačenja: dobesedno tolmačenje, pri katerem vsebino predavanj dobesedno pretolmači in si pri tem pomaga s prstno abecedo ter tolmačenje prilagojeno ZJ, pri katerem vsebino predavanj parafrazira in ob tem uporablja pantomimo. Pri drugem načinu mora biti inovativen pri iskanju sopomenk in izumljanju novih kretenj, včasih tudi v dogovoru z gluhim študentom. Pomanjkanje kretenj predstavlja pri tem veliko težavo. Iz intervjuja z gluho študentko je razvidno, da je njej bližje tolmačenje prilagojeno ZJ: »Če je tolmač razumel vsebino predavanja, je lahko tolmačil po svoje, oz. parafraziral. Če pa vsebine povedanega ni razumel, potem je tolmačil dobesedno. Vsekakor je meni bolj všeč prevod, ki ga tolmač pove po svoje, to pa zaradi tega, ker je tak prevod bolj prilagojen znakovnemu jeziku.«

Kontekstualni dejavniki

Tolmač se na univerzi srečuje s specifičnim okoljem, kjer so zelo pomembni odnosi, ki se vzpostavljajo med gluхими študenti, profesorji in ostalimi študenti. Kot je razvidno iz intervjujev, je interakcija gluhih

študentov tako s profesorji kot tudi s sošolci zelo odvisna od prisotnosti tolmača. Odnos profesorjev in slišočih sošolcev do gluhega študenta je korekten, pripravljeni so mu pomagati z zapiski, dopisovanjem po elektronski pošti, z obveščanjem o spremembah urnika. Vendar gluhi študent brez tolmača ne razume vsebine predavanj, iz zapiskov sošolcev se ne znajde, tudi študij literature mu ne zadostuje. Počuti se odrinjenega in osamljenega, tudi sam se izolira od drugih, ker jih ne želi nadlegovati. Kot to ilustrira odgovor gluhe študentke na vprašanje, kako bi shajala brez tolmača:

Podrl bi se svet! Brez tolmača gluhi študent ne more spremljati predavanja. Na predavanju bi lahko samo gledal v zrak, ali pa vsebino povedanega prepisoval od sošolca, seveda če bi si le-ta delal zapiske. Če bi bil študent dovolj pogumen, bi šel lahko do profesorja in prosil za zapiske. Enkrat sem bila na predavanju brez tolmača, doma sem se učila tako, da sem si celo knjigo prepisovala, vendar sem na izpitu padla. Profesor je med predavanji razlagal svoje izkušnje, ki pa jih jaz nisem slišala. Poleg tega pa je za nas gluhe zelo pomembno, da sledimo vsebini povedanega v svojem jeziku – znakovnem jeziku.

S prisotnostjo tolmača gluhi študent ne pridobi samo razumevanja iz vsebine predavaj, temveč tudi potrebno samozavest za aktivnejšo interakcijo s svojim okoljem.

Čeprav so odnosi na osebnem nivoju korektni, je zaskrbljujoče diskriminatorno ravnanje univerz, ki se še vedno izogibajo plačevanju stroškov tolmačenja. Kljub sprejetju ZUSZJ prihaja do nejasnosti v interpretiranju zakonskih določil povezanih s plačevanjem stroškov tolmačenja na fakultetah, saj univerze trdijo, da obiskovanje predavanj ne sodi k javnim postopkom, pri katerih je gluhemu zajamčena pravica do tolmača. Temu ozkemu razumevanju zakona oporeka tako ZZTSZJ kot tudi pripravljavec zakona MDDSZ in Vlada RS, vendar pa se je sodišče v primeru tožbe s strani gluhega študenta postavilo na stran univerz. Tako ostaja pravica gluhih študentov le črka na papirju. V primeru intervjuvanke, gluhe študentke, je fakulteta od nje kot pogoj za vpis zahtevala, da sama pokrije stroške tolmača. Kot pravi v intervjuju:

Na predavanjih je bil prisoten tolmač, vendar moram že kar takoj poudariti, da sem tolmača na predavanjih plačevala z vavčerji. Kajti na fakulteto so me sprejeli samo pod pogojem, če sama poskrbim za plačilo tolmača. To sem doživela kot diskriminacijo. Šla sem osebno do dekana in se pritožila nad tem pogojem, povedala sem mu, da se počutim diskriminirano, vendar nisem s tem nič dosegla. Ker je bilo 100 vavčerjev na leto, kolikor mi jih je dodelilo MDDSZ premalo, sem predavanja, pri katerih ni bila nujna udeležba, izpustila.

Stroške tolmača pokrivajo gluhi študentje z vavčerji, ki jih dobijo od MDDSZ za pokrivanje potreb tolmačenja izven rednega izobraževanja. Tolmač na podlagi prejetih vavčerjev izstavi račun MDDSZ, ki mu plača

stroške tolmačenja. Vendar pa ti vavčerji zadostujejo le za tretjino vseh predavanj. Čeprav je bilo že veliko dogovarjanja med ZDGNS, ZZTSZJ, ministrstvi in univerzami, do rešitve tega problema še ni prišlo. Univerze s svojim ravnanjem diskriminirajo gluhe študente, saj jim kratijo njihovo temeljno pravico do dostopa do informacij v njim prilagojeni obliki. V nekaterih primerih jim pomagajo z dodatnimi urami in gradivi.

Gluhe osebe se razlikujejo med seboj tako po nivoju znanja ZJ kot tudi slovenskega jezika. Večina gluhih ima težave s slovenščino. Problem predstavlja tudi splošna izobraženost gluhih, saj šolski sistem ni primerno prilagojen njihovim potrebam. Že srednješolsko izobraževanje ne omogoča gluhemu dijaku spremljanja snovi na njemu razumljiv način, zato prihajajo gluhi na univerzo s slabšim predznanjem v primerjavi z njihovimi slišječimi vrstniki. Intervjuvanec mi je posredoval svojo izkušnjo iz srednje šole, kjer njegov učitelj ni imel znanja ZJ, zato ni razumel vsebine predavanj. Poleg tega so po njegovem mnenju učitelji v srednji šoli preveč popustljivi do gluhih pri preverjanju znanja.

Tolmači so ne nazadnje omejeni z organizacijo svojega dela, saj opravljajo to dejavnost poleg službe ali kot samozaposleni. Tako eni kot drugi so preobremenjeni, saj potrebujejo gluhi tolmača ob različnih urah, včasih tudi ponoči. Gluhi študent sam stopi v stik s tolmačem preko sms-ov. Tolmač se odzove glede na razpoložljiv čas in gluhemu študentu pomaga pri iskanju drugega tolmača, če sam nima časa. Če tolmač sprejme tolmačenje, si za nadaljnja predavanja rezervira proste termine. V praksi se dogaja, da ima študent različne tolmače.

Izobraževanje tolmačev

Da bi tolmači svoje delo opravljali kvalitetno, jih je potrebno primerno izobraziti tako na osnovni ravni usposabljanja kot tudi s permanentnim izobraževanjem. S certifikatom pridobi tolmač osnovno znanje. Do nedavnega je v Sloveniji usposabljanje kandidatov za tolmače trajalo devet mesecev. Da bi sledili razvoju v Veliki Britaniji in ZDA, kjer se študij za tolmača izvaja kot diplomski ali podiplomski program, se je po novem program usposabljanja razširil na dve leti. Čeprav je v omenjenih državah pogoj za pridobitev certifikata iz ZJ visokošolska izobrazba, je v Sloveniji še vedno dovolj srednja šola. Večina tolmačev, ki so tolmačili pred sprejetjem ZUSZJ, je imela srednješolsko izobrazbo in so bili večinoma otroci gluhih staršev. Zato je organizator izobraževanja, ZZTSZJ, ki je želel obdržati takratno bazo tolmačev, ostal pri zahtevani srednješolski izobrazbi. Vendar pa ima večina današnjih tolmačev že visokošolsko izobrazbo.

Da bi dvignili kakovost izobraževanja v programu usposabljanja, sodelujejo kot izvajalci gluhe osebe, tolmači z dolgoletnimi izkušnjami kot tudi jezikoslovci. Program naj bi usposobil bodoče tolmače tako v veščinah tolmačenja kot tudi v poznavanju razlik med jezikom slišočih in ZJ.

Z namenom, da bi v program usposabljanja pritegnili čim več kandidatov (npr. otroke gluhih staršev, ki že imajo osnovno znanje iz ZJ) in tako

pokrili potrebe po tolmačih po celotni državi, so začetno zahtevo po opravljenem tristopenjskem tečaju iz ZJ spremenili v zaželeno znanje ZJ.

Certificiranje tolmačev je v Sloveniji organizirano na podlagi *Zakona o nacionalnih poklicnih kvalifikacijah*, ki ne predvideva kot obvezo izvajanje javnega izobraževalnega programa. Ker je gluhih oseb v Sloveniji trenutno 919, se zdi sedANJI način usposabljanja tolmačev za naše razmere primeren.

Zaradi obilice novih pojmov, s katerimi se srečuje pri svojem delu, prihaja do zahteve po nadgradnji znanja se tudi ZZTSZJ zaveda pomembnosti permanentnega izobraževanja certificiranih tolmačev. Ker je pri nas tolmač relativno nov poklic, pri katerem se odpirajo številna nova področja, ki prinašajo nove, nepoznane termine, je permanentno izobraževanje nujno potrebno. Zato ZZTSZJ nudi nadaljnje izobraževanje v obliki raznih delavnic, poleg samega izobraževanja pa je to tudi priložnost, da se tolmači seznanijo z dobrimi in slabimi praksami svojih kolegov.

S strani nekaterih tolmačev se pojavlja potreba po dodatnem izobraževanju v tehnikah tolmačenja, da bi se lažje znašli na področjih, ki jim niso blizu. Iz intervjujev je razvidno, da je večina tolmačev do svojega znanja premalo kritična in se izogiba permanentnemu izobraževanju. Postavlja se vprašanje, kako jih pripraviti do večje angažiranosti. Do sedaj je bila udeležba na izobraževanju prepuščena prosti izbiri posameznika, razmišlja pa se, da bi neudeležbo sankcionirali na podlagi

določil *Kataloga standardov, znanj in spretnosti* in *Pravilnika o disciplinski odgovornosti tolmačev*.

Reševanje težav povezanih s specifičnim delom tolmača

Pri tolmačenju na univerzah prihaja do specifičnih problemov in intervjuvanci predlagajo tudi nekatere rešitve zanje. Potrebno bi bilo sestaviti seznam splošnih strokovnih izrazov z različnih področjih in jim v dogovoru z gluhihimi študenti določiti kretnje. Pomembna je tolmačeva predpriprava na predavanje; ko tolmač sprejme tolmačenje, se mora pozanimati o vsebini predavanj na internetu, pri profesorju ali gluhem študentu. Pred predavanjem se z gluhim študentom pogovori o kretnjah, ki jih bo uporabljal za specifične izraze, in pozanima, koliko mu je snov poznana.

Med predavanjem lahko ustavi profesorja in ga prosi, da ponovno razloži snov, če vidi, da študent ne razume. Prav tako lahko po končanem predavanju prosi profesorja za dodatno razlago, če se mu zdi potrebna.

Alternativni pristopi

Na podlagi dosedanjih izkušenj so intervjuvanci izoblikovali tudi nekatere predloge za alternativne pristope, ki bi pripomogli k reševanju danih problemov. Tako se kaže potreba po spodbujanju gluhih študentov k dejavnejši vlogi pri študiju. Gluhi študentje so razpršeni po različnih fakultetah, zato se je nemogoče dogovoriti za neke standardne kretnje. Tolmači in gluhi študentje bi se morali usesti skupaj in poiskati rešitve. S strani gluhih študentov je bila izražena tudi želja po tem, da bi tolmači v njihovi družbi med seboj komunicirali v ZJ.

Ena od predlaganih rešitev je, da bi predavanja tolmačila dva tolmača, ki bi se menjavala v vlogah tolmača in zapisnikarja. S tem bi po eni strani razbremenili preobremenjenega tolmača in zadostili nujni potrebi po zapisnikarju. Zaželeno bi bilo tudi, da bi en tolmač spremljal gluhega študenta čez cel izobraževalni proces in/ali da bi se tolmači specializirali za različna področja tolmačenja. Študentje nujno potrebujejo tudi dodatne ure mentorstva, v kolikor jim že niso na voljo. Za uspešen študij je zelo pomembna tudi podpora družine.

Razprava

Temeljni vtis, ki izhaja iz izsledkov intervjujev, je, da tolmači svoje delo na področju visokošolskega izobraževanja gluhih dobro opravljajo. Tolmač za SZJ je v Sloveniji relativno nov poklic, ki se tudi na področju visokošolskega izobraževanja gluhih šele začnja uveljavljati. To področje pri nas še ni raziskano in zaradi majhnega števila gluhih študentov lahko pridemo le do subjektivne ocene o njegovi vlogi, ki je ne moremo primerjati s tujimi raziskavami. Trdimo pa lahko, da je tolmač v procesu visokošolskega izobraževanja gluhih nujen pri vseh tistih, ki so uporabniki ZJ. Na to kažeta oba intervjuja z gluhima študentoma. Čeprav zaradi danih razmer tega področja ne moremo primerno raziskovati in primerjati s tujimi izsledki, se iz intervjujev kažejo določene vzporednice in podobni problemi, s katerimi se srečujemo na področju visokošolskega izobraževanja gluhih tako pri nas kot tudi v tujini.

Eden izmed njih je izobraževanje tolmačev, tako osnovno kot tudi permanentno. Zaradi zahtevnosti tolmačenja v univerzitetnem okolju, ki predvideva poznavanje univerzitetnega diskurza, se postavlja vprašanje o ustreznosti srednješolske izobrazbe, ki je pri nas pogoj za pridobitev poklica tolmač/tolmačica SZJ. Iz študije, ki je predstavljena v teoretičnem delu, je razvidno, da je prenizka splošna izobrazba velika ovira pri uspešnem tolmačenju. Zaradi takšnih spoznanj so v tujini (ZDA in Velika Britanija) dvignili izobrazbene zahteve na univerzitetno stopnjo. Izobraževanje tolmačev je tam organizirano kot podiplomski študij,

ponekod tudi kot diplomski. V Sloveniji je certificiranje tolmačev organizirano na podlagi *Zakona o nacionalnih poklicnih kvalifikacijah*, ki ne predvideva izvedbe javnega izobraževalnega programa. Ker tolmač SZJ za uspešno delo potrebuje visokokvalificirana znanja in veščine, bi bilo smotno razmišljati o uvedbi izobraževalnih programov za tolmače v okviru visokošolskega izobraževanja. S tem bi se uredila izobrazbena stopnja, ki sedaj ne kaže jasne slike o zahtevnosti tolmačevega dela (po *Katalogu strokovnih znanj in spretnosti* je tolmačevo delo označeno kot zelo zahtevno, raven VI) in njegov statusni položaj v družbi.

V tujini zahtevajo, da tolmači nadgrajujejo svoje znanje s permanentnim izobraževanjem, ki je pri njih pogoj za podaljševanje veljavnosti certifikata. Pri nas nadaljnje izobraževanje ni tako strogo regulirano in je bilo do sedaj prepuščeno svobodni presoji posameznikov, saj že sam pravni okvir ne omogoča odvzema certifikata (*Zakon o poklicnih kvalifikacijah*). Vendar je potreba po njem izpostavljena tako s strani tolmačic kot tudi s strani direktorice ZZTSZJ in gluhe študentke, kar bi posredno lahko nakazovalo na deficite pri znanju in veščinah, ki so potrebna za uspešno tolmačenje na visokošolskem področju. Še posebej gre za tehnike tolmačenja, saj je pri tolmačenju na univerzah, kot kažejo tudi rezultati študij iz tujine, pomembno prepletanje in preklapljanje med dvema različnima stiloma tolmačenja (dobesedno tolmačenje in tolmačenje prilagojeno SZJ). Študentje, ki dobro razumejo ZJ, po navadi so to osebe, ki jim je materni jezik ZJ (v našem primeru gluha študentka), imajo raje tolmačenje po gluho in kakor kažejo rezultati po Marscharku (2005), tudi bolje razumejo pretolmačeno snov. Po drugi strani pa je iz

raziskave Napierove (2004) razvidna dilema, če ni za gluhega študenta primerneje, da se ga spodbuja k učenju strokovne terminologije v jeziku slišičih, kar mu lahko pomaga pri lažjem učenju in opravljanju izpitov. Kot je razvidno iz intervjujev, predstavlja pomanjkanje kretenj za strokovne izraze pri nas velik problem, ki bi se ga lahko rešilo z seznamom strokovnih kretenj (predlog direktorice ZZTSZJ) in skupnim sodelovanjem tolmačev in gluhih študentov, npr. v skupini za razvoj SZJ (predloga gluhe študentke in tolmačice).

Izkušnje in raziskave iz tujine kot tudi naše kažejo na nujnost specifičnih prilagoditev tolmačevega dela v univerzitetnem okolju. Tako poudarjajo predpripravo tolmačev na predavanja, s tem da se seznanijo tako z vsebino (pri profesorju in gluhem študentu ali na internetu) kot tudi s študentovim predznanjem ZJ, govornega jezika in predznanjem s področja predavanja. Podobno kot v tujini intervjuvanci poudarjajo pomembnost interakcije med tolmačem in gluhim študentom, saj predstavlja za razliko od ostalih prevajalcev tolmač ZJ vez med gluhim študentom in slišičim okoljem. V tem smislu je tolmačevo delo kompleksnejše od prevajalčevega, saj zajema empatično prilagodljivost potrebam gluhega študenta. Obenem pa tolmač s svojo naravnostjo vpliva na počutje in razumevanje snovi pri gluhem študentu. Tudi Marschark (2005) ob zaključku svoje študije nakazuje možnosti nadaljnjih raziskav o vplivu čustvenih stanj kot so motiviranost, udobje, sprejetost.

Marschark (2005) primerja gluhe študente neposredno s slišječimi ter jih tako postavlja na enakovredno izhodišče. Prejšnje raziskave gluhe študente ločijo od ostalih ter na ta način prezrejo njihove dejanske potrebe. Marschak (2005) ugotavlja, da dosegajo gluhi nižje rezultate tudi ob izkušenem in prilagodljivem tolmaču. Vzroke išče v predznanju s predhodnega šolanja in njihovi slabši pripravljenosti na univerzitetni študij kot tudi v posredništvu tolmačenja, ki ne more v celoti nadomestiti direktnega stika študenta s profesorjem. Pričujoča kvalitativna raziskava je pokazala, da je eden izmed pomembnih kontekstualnih dejavnikov prav slabše predznanje gluhih študentov, saj tako osnovnošolski kot srednješolski izobraževalni proces ni prilagojen potrebam gluhih. Prav tako se iz intervjujev kaže potreba po zapisnikarju in celo predlog po dveh tolmačih, ki bi izmenično tolmačila in delala zapiske.

Pomemben kontekstualni dejavnik je vsekakor tudi odnos univerz kot ustanov do gluhih študentov in uresničevanja njihovih pravic, ki naj bi jim bile zagotovljene z ZUSZJ. Nedorečenosti glede tolmačeve izobrazbe njegov poklic marginalizirajo, nejasne interpretacije ZUSZJ s strani univerz in sodstva pa gluhe študente diskriminirajo, kar je razvidno iz intervjuja gluhe študentke, ki se je morala obvezati, da bo sama poskrbela za kritje stroškov tolmača, da jo je fakulteta sploh sprejela na študij.

Zaključimo lahko, da smo pri reševanju problematike gluhih in njihovega izobraževanja šele na začetku poti. Pred nami je še mnogo odprtih vprašanj in problemov, ki jih bomo morali v prihodnosti rešiti, če bomo

hoteli, da ne bodo pravice gluhih ostale samo črka na papirju. S sprejetjem ZUSZJ in prihodom tolmača na univerzo, četudi je ta problematičen zaradi novosti samega poklica, se je gluhim odprla pot k možnosti boljše izobrazbe in s tem kvalitetnejšega in polnejšega življenja.

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Tematike raziskav o delavcih invalidih: pregledna študija

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Povzetek

Ker gre v primeru delavcev invalidov za tisto skupino delavcev, ki veljajo za težje zaposljive, ne le če zaposlitev izgubijo, temveč tudi z vidika ovir, ki se lahko pojavljajo v delovnem okolju že zaposlenih delavcev invalidov, je potrebno problematiki delavcev invalidov posvetiti ustrezno mero pozornosti, tudi z raziskovalnega vidika. S tem namenom je bila izvedena sistematična pregledna študija s pregledom tematik, ki jih raziskovalci najpogosteje obravnavajo v povezavi z delavci invalidi in katerim je dano premalo pozornosti. Iz začetnega nabora 1.131 študij so bile izključene študije, ki so bile zgolj podvojeni zadetki istih študij v različnih bazah, po katerih je mEga iskalnik iskal. Sledil je pregled glede na naslov, povzetek in ključne besede, poglobljen pregled teksta in odstranitev podvojenih vnosov pri iskanju po različnih ključnih besedah. V končnem izboru je bilo 76 študij. To znaša 6,72% prvotnega rezultata iskanja (1.131). Tematike, ki jih raziskovalci najpogosteje obravnavajo (ob upoštevanju v raziskavi uporabljenega metodološkega pristopa ali gledano v celoti) pri raziskovalnem delu na področju delavcev invalidov, so različni vidiki zaposlovanja te skupine delavcev ter posamezni

dejavniki razvoja karier delavcev invalidov. Premalo so obravnavane tematike s področja učenja, izobraževanja in usposabljanja, določanja potrebnih zmožnosti delavcev ter motivacijske tematike. Premalo je tudi študij, ki bi znotraj enega raziskovalnega načrta obravnavale več tematik in njihove medsebojne relacije, čemur kaže v prihodnjih raziskavah dati večji poudarek.

Ključne besede: zaposlovanje, izobraževanje, usposabljanje, motivacija, metodološki pristop.

Abstract

Since employees with disabilities are among those groups of workers who have many difficulties in finding a new job, it is necessary to pay them the appropriate amount of attention also from a research point of view. With this purpose, a systematic review study was conducted to review the topics researchers most often research in connection to employees with disabilities and those topics with too little attention given. A systematic review of research was based on a review of published original scientific papers (without limiting the period in which studies were published), available in databases through which NUK mEga search engine searches. From the initial set of 1.131 results, studies that were merely duplicates of studies in different databases were excluded. Followed a review by title, abstract and keywords, an in-depth review of the text and the removal of duplicates found using various keyword

searches. The final selection consisted of 76 studies. This amounts to 6.72% of the initial search results (1.131). The most researched topics (taking into account the methodological approach of a study or taken as a whole) in connection with employees with disabilities are different aspects of the employment of this group of workers and career topics of disabled employees. The subjects of learning, education and training, identifying and setting the necessary capabilities of workers and motivational area are often under-treated. Studies rarely addressed several topics and their mutual relations within their research plans. This shows a need for placing greater emphasis on this in future research.

Key words: employment, education, training, motivation, methodological approach.

Uvod

Delavci invalidi so, kljub pravni zaščiti, ki jim jo zagotavlja zakonodaja, ena najbolj izpostavljenih skupin delavcev (Pope in Bamba 2005), ki potrebuje podporo in pomoč ob vključevanju v delovno življenje. Brezposelnost delavcev invalidov raste kljub spodbujanju zaposlovanja invalidov z različnimi ukrepi (Altman 2005), kar je v kontekstu ekonomsko gospodarske krize, ki še vedno traja, pričakovano. Ker gre v primeru delavcev invalidov za tisto skupino delavcev, ki veljajo za težje

zaposljive, če zaposlitev izgubijo, je potrebno problematiki delavcev invalidov posvetiti ustrezno mero pozornosti, tudi z raziskovalnega vidika. S tem namenom smo v sistematični pregledni študiji izvedli pregled tematik, ki jih raziskovalci obravnavajo v povezavi z delavci invalidi z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije v že objavljenih študijah. Rezultati tega pregleda bodo podrobno predstavljeni v pričujočem članku. V tem smislu je glavni doprinos pregledne študije v tem, da smo opravili pregled obravnave tematik o delavcih invalidih, kakršnega do sedaj še nismo zasledili. V študiji smo izvedli tudi pregled pri tem uporabljenih metodoloških pristopov in metod. Rezultati tega dela sistematične pregledne študije so predstavljeni v drugem članku. V pregledni študiji uporabljamo izraz invalid izhajajoč iz terminologije, ki jo uporablja slovenska zakonodaja (ZZRZI-UPB2 2007; ZPIZ-2 2012; ZDR-1 2013; ZVZD-1 2011). V uporabi, še posebej na področju socialnega dela, so tudi druga poimenovanja, na primer hendikep ali ovira. Zavedamo se možne negativne konotacije pomena besede invalid in na tem mestu poudarjamo, da ji v nikakršnem smislu ne pritrjujemo.

Obstajajo različni modeli razumevanja invalidnosti. Dva, ki izhajata iz različnih izhodišč, sta medicinski in socialni model. Tradicionalni medicinski model razume invalidnost kot diagnozo in rešitev za invalidnost v kontekstu medicinskih rešitev. Ko je invalidnost ugotovljena, je posameznik uvrščen v ustrezno kategorijo in usmerjen na zdravljenje in rehabilitacijo (Duff, Ferguson, and Gilmore 2007: 19). Pri tradicionalni medicinski opredelitvi invalidnosti gre torej za ugotavljanje

invalidnosti kot telesne ali duševne anomalije, ki se nahajajo znotraj osebe same (Hahn v Kruse and Hale 2003: 2–3). V tem smislu je soočanje s problemom invalidnosti to, da oviro (vzrok invalidnosti) odpravimo ali pomagamo osebi, da se prilagodi okolju na način, da bi deloval kolikor je mogoče dobro, glede na svojo invalidnost (Kruse and Hale 2003: 3). Socialno razumevanje invalidnosti se ukvarja z ovirami (družbene, institucionalne in druge) znotraj družbe, s katerimi se invalidi soočajo (Khoo, Tiun, and Lee 2013: 40). Zato z vidika socialnega modela invalidnost ni posledica okvare, temveč je rezultat neuspeha družbe, da sprejme in ustrezno poskrbi za ljudi z okvarami in ovirami, zaradi česar se ti soočajo z invalidnostjo (Duff, Ferguson, and Gilmore 2007: 19). Za potrebe pričujočega članka razumevanje invalidnosti iščemo v povezovanju obeh pristopov, čeprav se, na prvi pogled, zdita nezdržljiva. Na eni strani je dolžnost delodajalca in družbe, da delavcu invalidu omogoči čim lažje vključevanje v družbo in delovno okolje (slovenska zakonodaja npr. v ta namen predvideva poklicno in zaposlitveno rehabilitacijo, ki ju je delodajalec dolžan omogočiti delavcu invalidu). Na drugi strani pa ni mogoče pričakovati optimalnih rezultatov vključitve, v kolikor tvorno ne sodelujeta obe strani, tako delodajalec kot delavec. V povezavi z navedenim nas je zato zanimala vloga delavca, ki kaže na njegovo aktivnost na področjih, ki so se, izhajajoč iz teorije ter prakse sodelovanja z delavci invalidi, izkazala kot zelo pomembna za zaposljivost. S tem nikakor ne želimo prezreti vloge in odgovornosti delodajalca in organizacije, temveč želimo kar se da poglobljeno preučiti enega izmed vidikov na izbranem področju.

Pregledna študija, katere rezultati so predstavljeni v pričujočem članku, je bila ena izmed osnov za oblikovanje in izvedbo obširne raziskave o motiviranosti delavcev invalidov za izobraževanje, usposabljanje ter tudi prezaposlovanje, ki so gonilna sila razvoja karier. Ravno zato smo pri pregledu obstoječih raziskav in tematik o delavcih invalidih obravnavali zaposlovanje invalidov in razvoj karier delavcev invalidov, določanje potrebnih zmožnosti delavcev, učenje, izobraževanje in usposabljanje invalidov ter motivacijsko področje.

Zaposlovanje invalidov, predvsem ohranjanje zaposlitve delavcev invalidov in razvoj karier invalidov, je ključno pri preučevanju problematike delavcev invalidov. Na eni strani je cilj posameznika (delavca invalida) in družbe ohranitev zaposlenosti delavcev invalidov, tako zaradi ovir k ponovni zaposlitvi kot zaradi manjšega pritiska na financiranje iz socialnih transferjev v primeru brezposelnosti. Na drugi strani je cilj delodajalca, da ima zaposlen kader, ki je ustrezno usposobljen in delovno zmožen za kakovostno in učinkovito opravljanje delovnih nalog. Da bi tako delavec kot delodajalec vedela, ali je delavec invalid zmožen opravljati trenutno delo ter ali obstaja potencial za napredovanje, je koristna uporaba kompetenčnega pristopa kot instrumenta za ugotavljanje pomanjkljivih področij in indikatorja potreb po dodatnem izobraževanju, usposabljanju ali spremembi delovnih nalog (prezaposlitev). Učenje, izobraževanje in usposabljanje, ki so del razvoja kadrov, je v tej povezavi mogoče razumeti kot možen način za odpravo ali izpopolnitev pomanjkljivih področij v znanju, spretnostih in kompetencah na sploh. Kakovost in učinkovitost izobraževanja,

usposabljanja in zaposlovanja je, izhajajoč iz teorije ter iz izkušenj dela z delavci invalidi, odvisna od motiviranosti delavcev invalidov za izbrane dejavnosti. Zaradi tega, je motivacijsko področje eno tistih, ki jim je potrebno v povezavi z delavci invalidi dati ustrezno pozornost.

Siceršnja izpostavljenost (delavcev) invalidov z vidika zdravja ter socialne in družbene vključenosti je v trenutnem obdobju gospodarske krize, z višanjem števila brezposelnih in, glede na število iskalcev zaposlitve, nizkim številom razpoložljivih prostih delovnih mest, še posebej očitna. Za delavce invalide je namreč, v primerjavi s preostalimi delavci, značilna višja stopnja brezposelnosti (P. H. Wehman 2011: 146). Plačana zaposlitev pa je eden ključnih dejavnikov socialne vključenosti posameznika (Barnes 2005: 541) ter je, med drugim, zelo pomembna tudi za ohranjanje zdravja posameznika (P. H. Wehman 2011: 147). Odsotnost zaposlitve namreč negativno vpliva na številne vidike zdravja (Stronks et al. 1997: 599), tako na fizično kot psihično (S. Lee 2013: 77).

Pri zaposlovanju na položaj invalidov na trgu dela vpliva več dejavnikov, na primer stanje v ponudbi in povpraševanju na trgu dela, gospodarske razmere, ukrepi za pospeševanje zaposlovanja, delovna zmožnost, predsodki idr. Zaposlenost spodbuja ohranjanje in razvoj določenih sposobnosti in veščin (P. H. Wehman 2011: 147) ter zdravja (Stronks in dr. 1997: 599), tako na fizičnem kot psihičnem področju (S. Lee 2013: 77). Poleg tega zaposlitev in ohranjanje zaposlitve za delavca invalida pomeni možnost, da sam poskrbi za lastne potrebe, za državo pa to pomeni manjšo obremenitev socialnih transferjev.

Stanje statusa zaposlenosti se razlikuje med kategorijami delavcev invalidov in sicer glede na njihove lastnosti (spol, izobrazba) in značilnosti invalidnosti (npr. stopnja okvare) (Magill-Evans in dr. 2008; Vedeler in Mossige 2010; Lindsay 2011).

Kariera predstavlja zaporedje delovnih pozicij, ki jih posameznik zaseda in opravlja na svoji zaposlitveni poti (Hall v Konrad 1996). V tem smislu razumemo tudi kariere delavcev invalidov, ki jim je, podobno kot nekaterim drugim skupinam delavcev, otežena participacija na številnih področjih življenja, med drugim tudi na področju dela (Pushkala in Anshuman 2007: 169). To se kaže tudi skozi številne ovire pri razvoju karier delavcev invalidov zaradi zdravstvenih in drugih razlogov (Fabian, Beveridge, and Ethridge 2009).

Izobraževanje in usposabljanje pomenita, tudi v primeru delavcev invalidov, dvig delovne učinkovitost in sposobnosti udeležencev izobraževanja na raven, višjo od predhodne. Kontinuirano ter hkrati organizirano učenje v organizaciji je potreba, ki prispeva k spremembam vedenja posameznikov/zaposlenih, s ciljem izboljšanja sposobnosti zaposlenih in izvedbe delovnih nalog (Možina 2009: 473). Zato je potrebno nameniti ustrezno pozornost izobraževanju in usposabljanju delavcev invalidov ter motiviranosti delavcev invalidov za izobraževanje in usposabljanje.

Če je delavcem invalidom omogočen dostop do ustreznega usposabljanja, to lahko pomembno prispeva k uspešnemu opravljanju

nalog v delovnem okolju (Marumoagae 2012: 354). Dodatno izobraževanje in usposabljanje invalidov ima namreč pozitiven vpliv na dvig njihovega delovnega učinka (Drobnič 2002: 453). Na uspešnost izobraževanja in usposabljanja vplivajo številni dejavniki, med drugim tudi značilnosti delavca, kjer ima motiviranost delavca (invalida) nedvomno pomembno mesto (Werner in Simone 2009: 80).

Kompetence so skupek izkazanih sposobnosti, znanja, spretnosti, vedenja in stališča posameznika (Svetlik v Majcen 2009: 23), ki so potrebne za to, da delavec delovne naloge uspešno opravi. V tem smislu je pri kompetencah ključno to, da gre za zmožnost, da delavec znanje, ki ga ima, dejansko tudi uporabi (Možina 2009: 218–219).

Poleg stališč, znanj, veščin in sposobnosti je motivacija eden temeljnih elementov človeškega vedenja, tudi v delovnem okolju (Werner in Simone 2009: 45). *Motivacija* obsega širok nabor zahtev, potreb, želja in podobnih dejavnikov, ki posameznika spodbudijo, da se vedejo na določen na način (Lazibat in Dumičić, 2011). Motivacijske teorije predstavljajo eno izmed možnosti za razumevanje posameznikovega ravnanja. Udeležba na določenih aktivnostih (če izvajamo obvezno udeležbo) ter uspešnost in učinkovitost opravljene aktivnosti sta zelo odvisna od motiviranosti posameznika (Werner in Simone 2009). Ustrezna motiviranost delavcev invalidov je v primeru izobraževanja in usposabljanja, ki pozitivno vplivata na delovni učinek posameznika, ter prezaposlovanja, ki zagotavlja ohranjanje zaposlitve (ko potreba po delu na trenutnem delovnem mestu zaradi različnih razlogov ugasne ali pa ni

možna), zelo pomembna. Praksa dela z delavci invalidi je ravno tako pokazala, da je motivacijski dejavnik na strani delavca invalida ključen za uspešno in učinkovito izpeljavo številnih sprememb trenutnega delovnega okolja in z njim povezanih dejavnikov.

Namen in cilj

Namen empirične raziskave je s sistematičnim pregledom objavljenih rezultatov raziskav ugotoviti, katere tematike raziskovalci najpogosteje obravnavajo v raziskavah na področju obravnave tematik povezanih z delavci invalidi (zaposlovanje, izobraževanje in usposabljanje ter motivacija v najširšem smislu), ne glede na vzrok in vrsto invalidnosti (brez omejitve obdobja, v katerem so bile študije objavljene). Izbrane tematike so pomembne z vidika karier in ohranjanja zaposlenosti in zaposljivosti delavcev invalidov.

Raziskovalni vprašanji, na kateri smo želeli odgovoriti, sta bili:

— Katere tematike raziskovalci najpogosteje obravnavajo pri raziskovalnem delu na področju delavcev invalidov z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije (brez omejitve obdobja, v katerem so bile študije objavljene)?

— Ali se pogostost obravnavanih tematik, ki jih raziskovalci obravnavajo pri raziskovanju na področju delavcev invalidov z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije (brez omejitve obdobja, v katerem so bile študije objavljene) razlikuje glede na uporabljen metodološki pristop?

Izvedba raziskave in rezultati

Sistematični pregled raziskav temelji na pregledu objavljenih izvirnih znanstvenih prispevkov (brez omejitve obdobja, v katerem so bile študije objavljene), ki so dostopni v bazah, po katerih išče mEga iskalnik NUK. Obravnavane študije smo iskali s ključnimi iskalnimi besedami v angleškem jeziku: employees with disabilities (v povezavi z eno izmed v nadaljevanju naštetih ključnih besed), training, employment, competence, performance, careers, education, motivation. Uporabili smo napredno iskanje po naslovu, ključnih besedah in po povzetku prispevka. Hkrati smo uporabili Boolov način iskanja z »and« med dvema in več ključnimi besedami. Iskalnik je bil uporabljen tako, da je poleg določene ključne besede iskal tudi po sorodnih besedah. Obdobje pregleda literature je potekalo od septembra 2013 do novembra 2013.

Da je bil članek vključen v izbirni postopek, je moral biti izvirni znanstveni članek objavljen v reviji z recenzijo. Dostopno je moralo biti

polno besedilo članka v angleškem jeziku. Raziskave so morale vsebovati tematike s področja obravnave delavcev invalidov (ne glede na vzrok in tip invalidnosti) in delavcev z resnimi zdravstvenimi težavami.

Če članek ni izpolnjeval naštetih vključitvenih meril, ni bil vključen v izbirni postopek. V obravnavo pravitako niso bile vključene objave, ki niso sodile v kategorijo izvirnih ali preglednih znanstvenih člankov. V mEga iskalniku NUK smo v bazah podatkov znanstvenih prispevkov s področja obravnave zaposlovanja, izobraževanja, usposabljanja in motivacije na primeru delavcev invalidov in v povezavi s pravili iskanja in kriteriji izbire našli skupaj 1.131 zadetkov. V članku, ki obravnava metodološke pristope k raziskavam različnih vidikov problematike delavcev invalidov, so podrobneje navedeni rezultati iskanja glede na ključne besede, izbran metodološki pristop idr.

Iz začetnega nabora 1.131 študij smo najprej izključili študije, ki so bile zgolj podvojeni zadetki istih študij v različnih bazah, po katerih je mEga iskalnik iskal. Sledil je drugi korak, v katerem smo preostalih 938 študij pregledali glede na naslov, povzetek in ključne besede. To je nabor študij ustreznih za nadaljnjo obravnavo zmanjšalo na 135. Sledil je poglobljen pregled teksta teh 135 študij in odstranitev podvojenih vnosov pri iskanju po različnih ključnih besedah (predhodno izključne podvojitve v različnih bazah člankov). V končnem izboru študij, ki so bile vključene v poglobljeno sistematično študijo, je bilo tako 76 člankov. To znaša 6,72 % prvotnega rezultata iskanja (1.131).

Med študijami s področja delavcev invalidov (pri tem smo pozornost usmerili v študije s področij zaposlovanja, izobraževanja, usposabljanja in motivacije) je bilo največ takih, ki obravnavajo različne dejavnike zaposlovanja invalidov (Mank et al. 1996; Unger 1999; Florey and Harrison 2000; Anderson, Bricout, and West 2001; Schartz, Schartz, and Blanck 2002; Doyel 2002; Kruse and Hale 2003; Smith et al. 2004a; Waddington 2004; Hernandez et al. 2007; Ozawa and Yaeda 2007; Thornton and O'Leary 2007; Duff and Ferguson 2007; Duff, Ferguson, and Gilmore 2007; Haynes, Shackelford, and Black 2007; I. S. Lee and Park 2008; P. Wehman et al. 2008; Cimera 2009; Schur et al. 2009; Holmqvist 2010; Ishii and Yaeda 2010; O'Neill and Urquhart 2011; Hartnett et al. 2011; Bourmaud and Rétaux 2012; Moon and Baker 2012; Russell 2012; Gold et al. 2012; Khoo, Tiun, and Lee 2013).

Na področju zaposlovanja invalidov študije obravnavajo dejavnike, kot so prilagajanje delovnega okolja in delovnega mesta delavcu invalidu (Paetzold et al. 2008; Ishii and Yaeda 2010; O'Neill and Urquhart 2011; Bourmaud and Rétaux 2012; Gold et al. 2012; Moon and Baker 2012), obravnava odnosa in zadovoljstva delodajalcev in drugih akterjev z delavci invalidi (Smith et al. 2004b; Schur, Kruse, and Blanck 2005; Duff and Ferguson 2007; Ozawa and Yaeda 2007; Hartnett et al. 2011), različni zorni koti obravnave ukrepov za spodbujanje zaposlovanja invalidov (Mank et al. 1996; Waddington 2004; Duff and Ferguson 2007; Luecking et al. 2008; P. Wehman et al. 2008; Holmqvist 2010; Russell 2012), različna področja in možnosti za zaposlovanje delavcev invalidov (Doyel 2002; Schartz, Schartz, and Blanck 2002; Waddington 2004;

Haynes, Shackelford, and Black 2007), prednosti in stroški zaposlovanja delavcev invalidov za delodajalce (Cimera 2009; Hernandez and McDonald 2010), izkušnje delavcev invalidov z zaposlovanjem (Khoo, Tiun, and Lee 2013), zaposlitvena diskriminacija (Bruyère et al. 2012) idr.

Relativno pogosto se raziskovalci lotevajo tudi posameznih dejavnikov razvoja karier delavcev invalidov (Klimoski and Donahue 1997; Alston and Hampton 2000; Balsler 2000; Weiner and Zivolich 2003; Whelley et al. 2003; Riches and Green 2003; Rumrill et al. 2004; Spataro 2005; Kavin and Brown-Kurz 2008; Schur et al. 2009; Jahoda et al. 2009; Russinova et al. 2011; Beatty 2011; Novak, Feyes, and Christensen 2011; Shaw et al. 2012; Lahelma et al. 2012; S. Lee 2013).

Na drugi strani so tematike učenje, izobraževanje in usposabljanje (Stancliffe 2001; Westmorland et al. 2005; Minarovic and Bambara 2007; Stumbo, Martin, and Hedrick 2009; Brady et al. 2010; Bruyère et al. 2012), določanje potrebnih zmožnosti delavcev (Colella, DeNisi, and Varma 1997; Miller and Werner 2005; Rosenthal et al. 2012; Zoer et al. 2012) in motivacijsko področje (Braitman et al. 1995; Feldman 2004) manj pogosto obravnavane.

Obravnavane tematike glede na metodološki pristop, ki je bil v raziskavi uporabljen

Natančen pregled vseh 76 v nadaljnjo obravnavo vključenih člankov je pokazal, da med raziskovalnimi načrti, ki so jih vključene študije realizirale, pri obravnavi delavcev invalidov (z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije) prevladuje kvantitativni metodološki pristop (34 oziroma 44,74 %). Preglednih znanstvenih člankov s področja je bilo 18 (23,68 %). Študij, ki so uporabile kvalitativni pristop, je bilo 14 (18,42 %). Pristop integracije kvantitativne in kvalitativne metodologije je bil uporabljen najmanj pogosto, in sicer v 10 študijah (13,16 %). V nadaljevanju bomo navedli tematike, ki jih obravnavajo raziskave, katerih rezultati so objavljeni v člankih, ki so bile vključene v sistematično pregledno študijo in so v svojih raziskovalnih načrtih uporabili kvalitativni, kvantitativni ali pristop integracije metodologij. Tematik, ki jih obravnavajo pregledni znanstveni članki, ne bomo obravnavali.

Tematike v kvalitativnih raziskavah

Med študijami s področja obravnave delavcev invalidov (z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije), ki so v svoji raziskavi uporabile kvalitativen metodološki pristop, je največ takih, ki obravnavajo kariere delavcev invalidov (Weiner and Zivolich 2003; Kavin and Brown-Kurz 2008; Jahoda et al. 2009; Beatty 2011; Novak, Feyes, and Christensen 2011; S. Lee 2013) in različne dejavnike zaposlovanja invalidov (Mank et al. 1996; Duff, Ferguson, and Gilmore 2007; Holmqvist 2010; Gold et al. 2012; Russell 2012). Na področju zaposlovanja invalidov študije obravnavajo dejavnike kot so odnos kadrovskih managerjev do zaposlovanja in zaposljivosti delavcev invalidov, prilagajanje delovnega mesta delavcem invalidom, učinki zaščiteneh delovnih mest in podpornih zaposlitev za invalide, učinki socialnih spodbud k zaposlovanju invalidov. Na področju karier raziskave preučujejo tematike kot so trajanje zaposlitve, tedenske delovne ure in plača delavcev invalidov, ovire na karierni poti, izkušnje z novozaposlitvijo, kariere delavcev invalidov na višjih delovnih mestih in pomen odnosov s sodelavci za socialno vključenost delavcev invalidov v delovnem okolju.

Ena izmed raziskav obravnava področje zaposlovanja invalidov v povezavi z učenjem, izobraževanjem in usposabljanjem (Hernandez et al.

2007), ena pa zaposlovanja invalidov v povezavi z razvojem karier marginalnih skupin (Kulkarni and Valk 2010).

Druge analizirane tematike v primeru študij s kvalitativnim metodološkim pristopom k raziskovanju, z izjemo določanja potrebnih zmožnosti delavcev (Rosenthal et al. 2012), niso bile zastopane.

Tematike v kvantitativnih raziskavah

Med študijami s področja obravnave delavcev invalidov (z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije), ki so v svoji raziskavi uporabile kvantitativen metodološki pristop, je najbolj pogosto obravnavana tematika zaposlovanje invalidov, samostojno (Unger 1999; Bricout and Bentley 2000; Smith et al. 2004a; Ozawa and Yaeda 2007; I. S. Lee and Park 2008; Luecking et al. 2008; P. Wehman et al. 2008; Cimera 2009; Hernandez and McDonald 2010; Ishii and Yaeda 2010; Bruyère et al. 2012; Moon and Baker 2012) ali v povezavi s kakšno drugo tematiko, kot so kariere marginalnih skupin (Dowler and Walls 1996; Hagner, McGahie, and Cloutier 2001; Ozawa and Yaeda 2007; Ren, Paetzold, and Colella 2008) in določanje potrebnih zmožnosti delavcev (Olson et al. 2001; Joe Graffam et al. 2002; Joseph Graffam et al. 2002).

Kvantitativno zastavljene raziskave so pogosto obravnavale tudi tematiko karier delavcev invalidov (Alston and Hampton 2000; Balser 2000; Rumrill et al. 2004; Schur et al. 2009; Russinova et al. 2011; Lahelma et al. 2012; Shaw et al. 2012) ter učenje, izobraževanje in usposabljanje (Stancliffe 2001; Minarovic and Bambara 2007; Brady et al. 2010; Bruyère et al. 2012) tudi v povezavi s kariernim področjem (Lewis, Thoresen, and Cocks 2011).

Motivacijsko področje ni bilo obravnavano, ne samostojno ne v povezavi s kako drugo tematiko. Področje določanja potrebnih zmožnosti delavcev invalidov je bilo obravnavano v dveh raziskavah (Miller and Werner 2005; Zoer et al. 2012).

Tematike v raziskavah z integracijo kvantitativne in kvalitativne metodologije

Integracija kvantitativne in kvalitativne metodologije v posamezni raziskavi lahko pomeni način premagovanja šibkih točk posamezne metode (Lin and Loftis 2004, 2), hkrati pa gre tudi za možnost za karseda celostno predstavitev predmeta raziskovanja (Lieber and Weisner 2010). Prav zaradi tega se kaže pristop integracije metodologij kot najprimernejši metodološki pristop k raziskovanju kompleksnih in občutljivih tematik kot so tematike, ki obravnavajo delavce invalide.

Študije, ki so v svojih raziskavah uporabile pristop integracije kvantitativne in kvalitativne metodologije, podobno kot v primeru raziskav z drugimi metodološkimi pristopi, najpogosteje obravnavajo zaposlovanje invalidov, samostojno in tudi v povezavi z drugimi tematikami. Raziskave se dotaknejo tudi karier delavcev invalidov ter učenja, izobraževanja in usposabljanja delavcev invalidov.

Tematike, ki jih raziskave obravnavajo, obsegajo socialno integracijo delavcev invalidov v delovno okolje (Riches and Green 2003), različne vidike prilagajanja delovnega okolja in delovnega mesta delavcem invalidom (Florey and Harrison 2000; O'Neill and Urquhart 2011; Bourmaud and Rétaux 2012), tudi z zornega kota delodajalca (Hartnett et al. 2011). Raziskovalce so zanimali tudi različni pristopi in ukrepi k spodbujanju zaposlovanja in ohranjanju zaposlitve delavcev invalidov z vidika pristopov k ohranjanju zaposlitve kronično bolnih delavcev (Haafkens et al. 2011) kot tudi z vidika odzivov na spremembo zakonodaje s področja delavcev invalidov (Duff and Ferguson 2007). Obravnavane so bile tudi tematike ovir pri zaposlovanju invalidov (Braitman et al. 1995), izkušenj delavcev invalidov z zaposlovanjem (Khoo, Tiun, and Lee 2013) ter percepcija delavcev o tem kako delodajalec obvladuje problematiko delavcev invalidov (Westmorland et al. 2005).

Med študijami, ki so v raziskavi (problematika delavcev invalidov) uporabile pristop integracije kvantitativne in kvalitativne metodologije, je torej največ takih, ki obravnavajo različne dejavnike zaposlovanja

invalidov (Braitman et al. 1995; Duff and Ferguson 2007; Haafkens et al. 2011; Hartnett et al. 2011; O'Neill and Urquhart 2011; Bourmaud and Rétaux 2012; Khoo, Tiun, and Lee 2013; Florey and Harrison 2000). Na drugi strani so tematike razvoja karier delavcev invalidov (Riches and Green 2003; Novak, Feyes, and Christensen 2011; Russinova et al. 2011), učenje, izobraževanje in usposabljanje (Westmorland et al. 2005; Haafkens et al. 2011), določanje potrebnih zmožnosti delavcev in motivacijsko področje (Braitman et al. 1995) redkeje obravnavane. To kaže, da je pogostost obravnave posameznih tematik v študijah, ki so uporabile pristop integracije kvantitativne metodologije, podobna kot v primeru obravnave študij ne glede na uporabljen metodološki pristop v izvedbi raziskave.

Diskusija

Namen empirične raziskave, katere rezultate smo predstavili, je bil s sistematičnim pregledom objavljenih rezultatov raziskav ugotoviti, katere tematike raziskovalci najpogosteje obravnavajo v raziskavah na področju delavcev invalidov. In sicer z vidika zaposlovanja, izobraževanja in usposabljanja ter motivacije v najširšem smislu, ne glede na vzrok in vrsto invalidnosti (brez omejitve obdobja, v katerem so bile študije objavljene). V ta namen smo pregledali objavljene izvirne znanstvene

prispevke (brez omejitve obdobja, v katerem so bile študije objavljene), ki so dostopni v bazah, po katerih išče mEga iskalnik NUK.

Med tematikami, ki jih raziskovalci najpogosteje obravnavajo pri raziskovalnem delu na področju delavcev invalidov, so različni vidiki zaposlovanja te skupine delavcev. Na primer prilagajanje delovnega okolja in delovnega mesta delavcu invalidu, obravnava odnosa in zadovoljstva delodajalcev in drugih akterjev z delavci invalidi, različni zorni koti obravnave ukrepov za spodbujanje zaposlovanja invalidov, različna področja in možnosti za zaposlovanje delavcev invalidov, prednosti in stroški zaposlovanja delavcev invalidov za delodajalce, izkušnje delavcev invalidov z zaposlovanjem, zaposlitvena diskriminacija idr.

Relativno pogosto raziskovalci obravnavajo še posamezne dejavnike razvoja karier delavcev invalidov. Tematike na področju učenja, izobraževanja in usposabljanja, določanje potrebnih zmožnosti delavcev in motivacijsko področje so redko obravnavane. Ker gre v primeru izobraževanja, usposabljanja, določanja potrebnih zmožnosti in analize motivacije za tematike, ki posredno (npr. znanje na zalogo) in neposredno (npr. uspešnost pri opravljanju trenutnih delovnih nalog) vplivajo na uspešnost pri delu, zaposljivost in možnosti na kariernem področju, bi se bilo potrebno tem področjem z raziskovalnega vidika bolj posvetiti. Ravno tako je čutiti pomanjkanje študij, ki bi znotraj enega raziskovalnega načrta obravnavale več tematik in njihove medsebojne

relacije, kar se, še posebej izhajajoč iz prakse, kaže kot vedno bolj potrebno.

V sistematični pregledni študiji nas je zanimalo tudi, ali se pogostost obravnavanih tematik, ki jih raziskovalci obravnavajo pri raziskovanju na področju delavcev invalidov z vidika zaposlovanja, izobraževanja, usposabljanja in motivacije (brez omejitve obdobja, v katerem so bile študije objavljene), razlikuje glede na metodološki pristop, ki je bil uporabljen v raziskavi.

Raziskavam, ki so uporabile različne metodološke pristope, je skupno to, da najbolj pogosto obravnavajo področje zaposlovanja delavcev invalidov, kar je še posebej očitno v primeru raziskav, ki so uporabile kvantitativno raziskovalno metodologijo (teh je bilo tudi največ, in sicer 34 med 76 vključenimi študijami). Relativno pogosto se raziskovalci posvečajo proučevanju različnih vidikov karier delavcev invalidov, najpogosteje v primeru raziskav s kvalitativnim metodološkim pristopom in najmanj pogosto v primeru študij, ki so uporabile integracijo kvantitativne in kvalitativne metodologije.

Zanimivo je, da v primeru raziskav s kvantitativnim metodološkim pristopom, kljub številčnosti, ni niti ene take, ki bi obravnavala motivacijsko področje, samostojno ali v povezavi s kakšnim drugim področjem. Motivacijskega področja se pravzaprav lotita le dve študiji. Ena je zajeta v enem izmed preglednih znanstvenih člankov, ki jih z vsebinskega področja nismo posebej obravnavali (obravnavano le v

skupnem pregledu ne glede na metodološki pristop v raziskavi), druga pa v študiji, ki je v raziskovalnem načrtu in raziskavi uporabila pristop integracije kvantitativne in kvalitativne metodologije. Na sploh je na področju obravnave motivacijskih tematik v povezavi z delavci invalidi čutiti največje pomanjkanje v že izvedenih in objavljenih raziskavah, čemur bi bilo potrebno v prihodnje nameniti več pozornosti.

Nekoliko bolj pogosto kot motivaciji se raziskave posvečajo področju določanja potrebnih zmožnosti delavcev invalidov. Glede na to, da je delavna zmožnost delavca invalida ena ključnih postavk, ki vplivajo na ohranitev zaposlitve in zaposljivost v primeru izgube zaposlitve te skupine delavcev, bi bilo potrebno v prihodnje temu področju nameniti večjo pozornost. Delež raziskav, ki obravnavajo omenjeno tematiko, se, glede na posamezen metodološki pristop, giba od najnižjega 0 (v raziskavah s pristopom integracije kvantitativne metodologije) do 7,14 % (v raziskavah s kvalitativnim metodološkim pristopom). V obeh primerih gre za relativno majhen nabor raziskav, ki so uporabile eden ali drugi metodološki pristop, a kljub temu kaže na to, da je v dosedanjih raziskavah temu področju dan premajhen poudarek, saj je tudi v primeru raziskav z najpogosteje uporabljenim kvantitativnim metodološkim pristopom zgolj 5,88 % raziskav, ki so obravnavale določanje potrebnih zmožnosti delavcev invalidov.

Podobno pomanjkanje že izvedenih raziskav in objavljenih rezultatov se kaže tudi na področju obravnave tematik povezanih z učenjem, izobraževanjem in usposabljanjem delavcev invalidov. Med raziskavami s

kvantitativnim metodološkimi pristopom je tako 11,76 % takih, ki obravnavajo to področje, med raziskavami z integracijo metodologij je odstotek študij, ki so obravnavale to tematiko, 10. Na drugi strani se kvalitativne študije (vključene v analizo) tega področja ne lotevajo. Kljub premajhni pozornosti, ki je v obravnavanih raziskavah namenjena temu področju, je mogoče trditi, da je ravno učenje, izobraževanje in usposabljanje delavcev invalidov tisti dejavnik, ki ima lahko pomemben pozitiven vpliv tako na delovno zmožnost delavca invalida kot na njegove zaposlitvene možnosti. Zato kaže temu področju v prihodnje posvetiti več pozornosti tudi z raziskovalnega vidika.

Zaključek

Ker veljajo delavci invalidi za eno najbolj občutljivih skupin delavcev, velja temu področju, tudi z raziskovalnega vidika, nameniti ustrezno skrb. Predstavljena sistematična študija in njeni rezultati kažejo na to, katere tematike (zaposlovanje, izobraževanje in usposabljanje ter motivacija v najširšem smislu) raziskovalci najpogosteje obravnavajo v povezavi z delavci invalidi, pri katerih tematikah je videti pomanjkanje raziskav in kaj bi bilo ključno v prihodnje podrobneje preučiti.

Tematike, ki jih raziskovalci pri raziskovalnem delu na področju delavcev invalidov najpogosteje obravnavajo (ob upoštevanju v raziskavi

uporabljenega metodološkega pristopa ali gledano v celoti), so različni vidiki zaposlovanja te skupine delavcev, posamezni dejavniki razvoja karier delavcev invalidov. Medtem ko so tematike na področju učenja, izobraževanja in usposabljanja, določanje potrebnih zmožnosti delavcev in motivacijsko področje premalo pogosto obravnavane. Ravno tako je čutiti pomanjkanje študij, ki bi znotraj enega raziskovalnega načrta obravnavale več tematik in njihove medsebojne relacije.

Na tem mestu želimo omeniti tudi možne omejitve sistematične pregledne študije, katere rezultate smo predstavili. Ena izmed njih je povezana z možnostjo posploševanja predstavljenih ugotovitev. Pri iskanju smo namreč dostopali zgolj do tistih člankov, ki so bili s celotnim tekstom dostopni v bazah, po katerih išče NUK-ov mEga iskalnik, kar pomeni, da ni bilo mogoče dostopati do polnih tekstov vseh člankov, ki obravnavajo izbrane tematike. Potencialno omejitev lahko predstavlja tudi izbira ključnih besed, ki pomembno vpliva na nabor zadetkov. Namesto nekaterih angleških besed (npr. employee za delavca) bi namreč lahko uporabili druge (npr. worker za delavca), kar bi lahko vplivalo na dobljene zadetke.

Omeniti je vredno tudi prihodnje raziskovalne izzive. Ker se je izkazalo, da so v obravnavanih študijah premalokrat obravnavane nekatere ključne tematike, kot so motivacija delavcev invalidov (npr. za izobraževanje in usposabljanje), določanje potrebnih zmožnosti (ki so tesno povezane s kompetencami) ter učenje, izobraževanje in usposabljanje, se velja tem področjem v prihodnjih raziskavah bolj

poglobljeno posvetiti. To je potrebno tudi zaradi tega, ker so omenjene tematike pravzaprav zelo tesno povezane z ohranjanjem in izboljševanjem delovne zmožnosti delavca invalida, s tem pa, posledično, tudi z možnostmi delavca invalida, da trenutno zaposlitev ohrani oziroma lažje pridobi novo, če trenutno zaposlitev izgubi.

Raziskave ravno tako le redko obravnavajo več tematik v isti raziskavi (na primer izobraževanje in motivacija). Če že, raziskovalci v isti raziskavi najpogosteje obravnavajo področje zaposlovanja invalidov s katero izmed drugih tematik. Izhajajoč iz obravnave delavcev invalidov v praksi kot tudi v povezavi s pomanjkanjem že objavljenih študij, ki bi obravnavale nekatere tematike in povezave med njimi, se tako kaže potreba bo analizi več tematik hkrati (na primer povezava med kompetencami delavca invalida in njegovo motivacijo za izobraževanje in usposabljanje). Omenjeno je z vidika ustrezne obravnave različnih možnosti ohranjanja in izboljševanja zaposlitvenih in delovnih zmožnosti delavcev invalidov nujno.

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Reactivating the past: a case study analysis of a non-museum-based Yugo-nostalgic exhibition in Serbia

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Abstract

With the dissolution of socialist Yugoslavia followed by ethnic cleansing, massacres, and the urbicides of large cities, such as Sarajevo, Vukovar or Mostar, the discourse of “brotherhood and unity” was suppressed, and any sense of it being genuine has been lost.

The policy of multiculturalism was instantly transformed into a re-emerged nationalist policy, and the institutions dealing with the representation of the memory were reinforced in order to re-define, construct, or at least upgrade the new interpretation of the recent past from the new national perspectives. Since the fall of the Milošević regime, the politics of memory has been transformed into new sets of visual representations. One of them is the Yugo-nostalgic competing discourse that was visualized recently through a temporary exhibition based on a private initiative. In this article, the contemporary image of the given type of nostalgia through case study research of a Yugo-nostalgic exhibition, which took place in Belgrade from October 2013

January to 2014 is analyzed. The main elements, events and personalities that were selected for construction of the newly actualized trend are recounted.

Keywords: Yugo-nostalgia, exhibition, Serbia, Belgrade.

Introduction

Starting in the 1980s, Serbia introduced the actualization of previously oppressed issues and, in such way, reinterpreted its past. Selection, fragmentation or absolute negation became a new political framework closely tied to the aggressive nationalist politics of the Milošević era. Historical revisionism and a discourse of self-victimization became predominant methods of popularizing the history. The role of the Serbian Academy of Science, various nationalist novelists, such as Dobrica Ćosić, and media that were actively reinforced to produce news about ethnic conflict (Malcolm (1996): 338) were ultimately constructing the nationalist discourse, fixing and legitimizing Milošević's politics of military intervention.

The revision of the Second World War with the new emphasis on the crimes committed by the Partisans, the authoritarianism of Titoist

Yugoslavia, and the redefinition of the figure of Draža Mihailović and the Chetniks constructed a new ideological imagination of the past. Anti-communism, nationalism, and traditionalism became the key ideological tools, and the Second World War discourse was used as a fertile space for the reinterpretation of the past in this regards. The Chetniks became a perfect figure representing these new ideological values. Additionally, the actualization of discourses related to the Second World War made it easier to compromise the victory of Tito's Yugoslavia policies (Stojanović (2011): 232).

The narrative of "brotherhood and unity" became marginalized, freeing up space for newly- emerged nationally-based narrations in Serbia. In order to justify the wars in the former Yugoslavia, a new national historical consciousness was implemented. It "was a blend of [the] delusion of grandeur, and self-pity, of national arrogance and self-victimization" (Stojanović (2011): 224). However, the fall of the Milošević regime did not end the decades-long ideology, which he had embodied. The nationalist mythical frame, accompanied by an anti-European discourse, an imaginative "Serbianness", and the negation of the International Criminal Tribunal for the former Yugoslavia (ICTY), remains to be exploited at different public discourses even fifteen years later (Horton (2011): 177, Stojanović (2011): 232). As an example, the rhetoric of Vojislav Koštunica and other representatives of DSS party who try "to unite the Serbs around a romantic and nationalist version of anti-communism" can be mentioned (Buchenau (2011): 124).

Democratic progress is fragile; many sectors of the economy, such as the oil industry and Serbian Telekom, are state monopolies, “the government is the generator of corruption” (Ramet (2011): 9), history textbooks remain under the publishing monopoly of the Council for Textbook Publishing that is closely related to reliable members of the ruling parties (Stojanović (2011): 223) and finally, the free media as well as liberal elite and civil society have been marginalized” (Dulić (2011): 30).

Describing the contemporary political, economic and cultural situation in Serbia, experts give quite dark evaluations. Thus, in 2005, Washington’s Heritage Foundation has ranked the country near the bottom of the economic freedom index. Additionally, Serbia is characterized by the high level of corruption and a transit country for trafficking illegal drugs, with the center of such activity in the Sandžak region (Ramet (2011): 8). In 2007, Transparency International ranked Serbia below Mauritania, Madagascar, Lesotho, Burkina Faso, Ghana, and Botswana on its corruption perception index (Ramet (2011): 9). Another alarming phenomenon, which was cited by the Helsinki Committee for Human Rights, is the different types of violence in all spheres of public life, such as street, domestic and institutional violence (Dulić (2011): 28). This is accompanied by the retrograde ideologies and open homophobia (Dulić (2011): 28).

Even though the pre-conditions for the overall neglecting of the civic values and nationalism patterns may be found in the habits and culture,

according to Ramet the main “success” in the actualization of the nationalist rhetoric is that of the Serbian elites who have used its special strategies and tactics over the past quarter of a century (Ramet (2011): 10). Dulić (2011) is of a very similar opinion, claiming that Serbia’s transition has been an elite-driven and did not change after the death of Milošević.

As the reaction to the unceasing state intervention into the economy, education, and media, concurrent discourses are emerging, one of which is the Yugo-nostalgic discourse, working as one possible reaction to the homogenization of identity and provoking the multicultural patterns that were oppressed during the period of Yugoslav disintegration (Boskovic (2013): 57).

Our empirical research will draw some attention to the latter aspect and will deal with an analysis of the construction and representation of the vision of the recent past in the public sphere. Nevertheless, we assume that this article will not be able to cover the broad dimensions of the representation of nostalgia in Serbia, which has to include different actors and institutions, but rather draw attention to the trends of actualized memory through the unique content of the non-museum-based exhibition that took place in Belgrade. We aim to analyze the elements through which the Yugo-nostalgic discourse is constructed, what events or personalities are displayed and how, consequently, the image of the socialist past is represented.

We have applied the analysis of visual data and a semi-structured interview with the guides of the exhibitions as the most relevant methods for our research. In the following section, we will describe our findings dedicated to the exhibition, specifically regarding the location, main elements, and predominant discourses.

In the next section, we will present the main aspects of the research subject.

Some Finding on Nostalgia

Yugo-nostalgia is evident in almost every corner of the former republics (Buric (2010): 227, Velikonja (2008), Volčič (2007)) and may be included in the broader context of the nostalgia as a cultural phenomenon. The given phenomenon “has become a key term in discussions of the varieties of remembrance commonly practiced and represented in contemporary Western culture” (Radstone (2007): 112). We are observing the emergence of the new dimension of remembering through the whole Europe, which might be called the nostalgia boom. This boom is the reaction to the rapid social changes in the form of activated attempts to preserve continuity of identity (Davis (1977): 419). According to Dames (2001), it first acts as a reaction to the modern crisis

of identity. The identity construction is closely tied to the political dimension because the individual is constructing the imagined world of comfort and sanctuary as a reaction to non-satisfactory contemporary conditions of his life.

According to Velikonja (2008: 28), the main traits of a nostalgic narrative are ex-temporality, ex-territoriality, sensuality, complementarity, conflicted story lines, unpredictability, polysemism episodic nature

The key element, which is easy to find when describing the nostalgic phenomenon, would be its episodic nature, which eventually aids in understanding the mechanism of its vitality because it gives a “green light” to use a partial image of the complicated reality and to dismiss the political background of this event (Velikonja (2008): 28).

Traditionally, nostalgia has been associated with false memories and forgetting where the individual was seeking refuge from turbulence (Lowenthal (1989): 21), with the abuse of history and depthlessness (Radstone (2007): 114). It has different dimensions, including cultural, political and economic. The nostalgic affiliation may be divided into three perspectives: 1) nostalgia as a world phenomenon, 2) post-socialist nostalgia, typical for countries of the former socialist block, with a similar modus of collective remembering, and finally 3) Yugo-nostalgia, a typical phenomenon of the post-Yugoslav countries.

Consequently, the post-socialist nostalgias as any other form of remembering “works as a form of selective amnesia, idealizing the past by refereeing to the low unemployment rate and strong sense of community” (Cooke (2005): 104). It is criticized for structuring knowledge in such way that the real problems of the existence are negated, for instance, the problems of human freedom, lack of transparency or anti-democratic rule (Cooke (2005): 104)

When generalizing the features of the second dimension, the post-socialist nostalgia, Boyer (2010) defines five main characteristics of them:

1. Nostalgia is Heteroglossic

The author uses Bakhtin’s term to emphasize the plurality of images and ideas that ground the nostalgic discourse(s). All of them do not homogeneously deal with a grief for or obsession with the past, but rather “represent the dialogical gossamer of idiosyncratic references, interests, and affects that are channeled through nostalgic discourse” (Boyer (2010): 20).

2. Nostalgia is Indexical

This means seeing nostalgia as an indexical practice, the process of the ongoing identification of the person with the world, one lived before

from the collective memory experience (personal vs. collective identification).

3. Nostalgia is Allochronic

The given phenomenon is not limited to one region (Eastern Europe), and is not only the product of the local actors, but also the constructions provided by the post-colonial thinking of former empires.

4. Nostalgia is Symptomal

That nostalgia is a growing trend in all parts of the Europe.

Another author, whose research on nostalgia has become a classic in its field, is Svetlana Boym. She identifies two types of nostalgia: restorative and reflective. "Restorative nostalgics" do not think of themselves as nostalgics and believe that their project is about truth. "This kind of nostalgia characterizes national and nationalist revivals all over the world, which engage in the antimodern myth-making of history by means of a return to national symbols and myth" (Boym (2001): 41) Restoration signifies a return to the original stasis (Ibid: 49), where the reflective nostalgia's focus "on to the meditation on history and the passage of time" (Boym (2001): 49). In the empirical part of this paper, we will be able to observe what kind of nostalgia is represented in the chosen exhibition in Belgrade, but before moving to the analysis, we some types of the Yugo-nostalgia phenomenon should be introduced.

Some finding on Yugo-Nostalgia

The bars and restaurants throughout the territory of the ex-Yugoslav countries that display socialist aesthetics with particular reference to Yugoslavia as a key structure of their design concept are an example of Yugoslav nostalgia. Such are the cases from Sarajevo (Velikonja (2008)), Podgorica or Ljubljana (Boym (2001)). The hotels or hostels decorated in similar styles are another example. Rock bands using the Yugoslav context for their songs (Volčič (2007): 33) or the media-scape of recently produced films reflecting on Yugoslavia, such as *Tito and Me* (1993), *Tito Among the Serbs a Second Time* (1994), *The Road of Brotherhood and Unity* (1997), *Marshal* (2000) and other are just some of the examples collecting the activation of the re-actualization of Yugoslav context. The hair salon where one can be styled with Jovanka Broz's unique hairdo or signs on the restroom reading "Tito" and "Jovanka" are other details of the puzzle. The two main Serbian football teams still use the red star as a part of their emblem and continue to use the socialist names of *Partisan* and *Red Star* (Bancroft (2009): 12).

The geography of the phenomenon is spread through all ex-Yugoslav territories, and a single place cannot be defined as a major center of nostalgia production and consumption. In our research, we would add to this collection our observation of the new form of commemoration practice: the exhibition.

Even though the phenomenon is visible in all former countries, the works analyzing the nostalgia in the post-Yugoslav countries are scant. The phenomenon was theoretically conceptualized by Velikonja (2008), its main forms were described by Volčič (2007), and its relatively new form of existence in the virtual space was analyzed by Boskovic (2013) and Mazzucchelli (2012).

Analyzing Yugoslav nostalgia, Volčič (2007) distinguishes three main aspects that reproduce the phenomenon political, cultural and economic field and typically overlap with each other.

1. Revisionist nostalgia, which works as a political type of commemorations and mobilizes the image of the past as an inquiry for revision of the official interpretation of the former period and as the renewal of a shared sense of belonging. Usually, revisionist nostalgia is visible as a form of public debates.
2. Esthetic nostalgia, which functions as a cultural phenomenon and aims to preserve an authentic Yugoslav culture.
3. Escapist, utopian nostalgia, which is the most ahistorical from all three types: the commercial phenomenon that is based on exploitation of the images of “idyllic” Yugoslavia.

Analyzing these highly eclectic, liquid and fragmented practices of the commemoration of the former past, Velikonja discovered that some of them (if not the majority) appeal to the image of Josip Broz Tito. The first and the only president of Socialist Yugoslavia is the element of the

nostalgia discourse that permeates the different imaginary spaces that could be classified as nostalgic. Therefore, Velikonja made a step forward in the classification of the given term and distinguished the sub-phenomenon of Titostalgia. He defined this as a nostalgic discourse on the late Yugoslav president, which consist of a series of disconnected discourses, each of which add some new elements to the contextual picture. The main peculiarity by which the image of Tito may be included in the nostalgia perception is the ironic decontextualization of the leader's image. For this reason, the real historical leader is of less interest to the nostalgic-sympathizers; it is the constructed image that is valuable. Titostalgia, therefore, is dealing "not with the resurrection and conservation of a real person, but it constructs the new utopian narrative of needs" (Velikonja (2008): 130). Titostalgia is a life of Tito's image after his death, the symbolic life after the physical life.

As mentioned at the beginning of this section, Yugo-nostalgia was analyzed on different levels with the application of broad verity of methods. Velikonja (2008) represents the theoretical conceptualization and allocation of the sub-phenomenon of Titostalgia, Volčič (2007) determined the core forms of this phenomenon, and Boskovic (2013) and Mazzucchelli (2012) concentrated on the analysis of the virtual Yugo-spaces. However, the phenomenon still lacks sufficient analysis in different dimensions, such as the ties with the political policies of the analyzed post-Yugoslav countries, the qualitative analysis with the representatives of the classified groups, the statistical data and comparisons on the number and characteristics of the given fragmented

groups throughout ex-Yugoslavia, the nostalgia economy, and finally the condition of memory policy in the representation of the given phenomenon in the public space.

The “Good life in Yugoslavia” Exhibition

For this study, we have selected the case study analysis of the exhibition that took place in Belgrade, Serbia. We proceeded with the visual analysis in December 2013. We had several reasons for choosing the exhibition: the typical location, the fact that the initiator that does not have a direct connection to any of the museums in Belgrade, the declared nostalgic content, the massive promotion that accompanied the exhibition and the interest that the exhibition had among the visitors. The last argument is based on the pilot observation conducted near the entrance to the exhibition.

The location of the exhibition stresses its non-traditional character and place it in a different context than traditional ones have. The central area of the city (an upmarket shopping street with boutiques, restaurants and bars), everything connected with conspicuous consumption, was the place chosen to organize the exhibition. The two-story building is attached on one side to a *Sephora* cosmetic shop, on

the other side to boutiques included into a visually similar row. The entrance showcases are decorated with the pictures of eclectic products related to Yugoslavia: a *Zastava* car, a sausage kiosk, a package of coffee, a dental chair and a motorbike (Pic.1). The upper part of the showcase invites both in Serbian and English to visit the *International Exhibition of Good Life from 50's till 90's*.

Picture 1: Entrance to the exhibition



A young man in a Yugoslav police uniform is inviting pedestrians to visit the exhibition. He is smiling and allows to people to take photos with him (at no extra charge). Some of the passers-by are showing their interest and come closer to look inside the giant window to receive their

first instant impression on the value of the offer. The entrance door is transparent and bombards the observer with the Zastava car inside, with the retro-style coffee counter and food kiosk similar in style. When stepping inside, one notices that the kiosk is an imitation of the popular Belgrade sausage kiosk of the Yugoslav era. A young lady, dressed in a socialist sales uniform is preparing sausages, which one can buy at a reasonable price in Serbian dinars equivalent to several euros. Boiled eggs, coffee, and some other modest courses are included in the menu. The image of the seller is in contrast to the smart phone that she uses when nobody is buying food, the tattoos visible on her body and some piercings on her face.

The most popular product is the Belgrade hot sausage with a piece of bread. In socialist Yugoslavia, a similar kiosk was located at the city center, functioning both as a salespoint and as the common meeting place. We think that such places are valuable places of initiation of proper city identification and may be classified in the same category as city monuments, which play a role of city markers or identifiers of the urban landscapes. Additionally, if it became associated with a cultural urban custom, a sausage kiosk will be the point of one's initiation into city life. When the product symbolizes some collective taste while being popular, one becomes included in the shared city tradition. Symbolically, by trying the ritual food (sausage at this kiosk is no longer a simple sausage as in other places, but rather a sacral food), one confirms one's status as a 'real', 'true' visitor of the city.

Therefore, when the contemporary exhibition invites the visitor to re-actualize the lost tradition by using the Yugo-entourage and visitors' imagination, it imprints on the visitor's perception more deeply than any other type of museum exposition. It happens because the person is becoming involved in several additional levels of perception in comparison to standard exhibitions. One not only observes and touches the objects, but also shares/experiences the re-actualized common practice. Even if the taste of this sausage has little in common with its authentic socialist version, even if the waitress, with her piercings and tattoos, does not have much in common with the socialist waitresses, the act of involvement into the theatrical Yugoslav everyday practice makes the visitor believe in the deeper "realness" of it and establishes closer ties with the material performed at the exhibition. In such way, the mechanism of nostalgic attractiveness may be formed. The shared cultural practice based on the imaginary level creates the new utopias and new worlds of a country that never existed: the peculiar idea-landscapes, in the word of Appaduraj (1993).

Funding for this exhibition was private; a model of self-sufficiency is used. In our opinion, the organizers are using a for-profit model and thus view the exhibition as a business project with possible risks and possible profit. The reasons for considering exhibition to be a commercial project are the following: first, the leasing of premises; secondly, non-installation inside any of them; thirdly, the emphasis on the positive/nostalgic essence of the exposition.

The uniqueness of the given exhibition in comparison to other public representations is formed by a variety of the aspects, including:

1. It is based on private initiative and financial sources.
2. It is not located inside any museum building.
3. It is a commercial project.
4. It represents Yugoslavia in a selectively formed, positive way.
5. It uses the word “nostalgic” in self-description for the purposes of self-promotion.

In order to understand the main features and special details that construct the space of Yugoslavia, we will briefly describe the exhibition space and its sections.

The exhibition itself is located on the second floor of the building; an entrance fee policy equal to other Serbian museum fees is charged.

It contains detailed plaques in a current style, prepared both in the English and Serbian languages. The space is divided into sections, each of which represents a particular issue: for example, Yugoslav music, media, medicine, consumer goods, sport, traveling and so on. The descriptions of the plaques made for each of the sections are sufficiently detailed.

Each section is organized in the form of installation and attempts to present an atmosphere by reconstructing the average authentic view of

the private office, shop or a dental office. The first section displays the image of the socialist shop. Shelves are filled with Yugoslav products, and the center of the room is used for displaying the main element: the sales space, accompanied by a cash register, scales and small decorative details, such as the journal that the seller is reading (Pic.2).

Picture 2: Shop, Section of the exhibition



One of the sections is dedicated to the representation of a typical office. The room is decorated with a picture of Tito on the wall; a shelf with the small radio and table with several accounting ledgers on it. However, the significantly interesting item for us might be the plaque, which accompanies the section. It describes the function of through two roles: director and the employee. We will skip the whole description because it is too long, but will mention several important sentences. "To be a director in the context of workers' self-management meant more headaches than privileges...". Moreover, a description of the employee: "An employee was also a self-manager... He could complain about his small salary... director... director's secretary... However, he also could get a loan... and knock back a brandy on a break. That is why the employee came into his office every day".

The given description emphasizes the self-management system of the Yugoslavia and shows its benefits in an ironic manner. Through the text, one will find the reference to the real problems of self-management; however, the dominant strategy is to show the advantages of the given economic model by including it in the context of the everyday life.

The ironic context used on the plaque allows us to define the type of the nostalgia applied here. Boym (2001), whom we have already cited, defines two types of nostalgia: restorative and reflective. The first category of nostalgia is based on the nationalist revivals. Such nostalgics do not think of themselves in terms of nostalgia, but rather they believe that their project is about truth. Another type, the reflective nostalgia,

focuses “on the meditation on history and the passage of time” and, unlike the other category, which is deadly serious, it can be ironic and more reflexive (Boym (2001): 49). Consequently, we would define the exhibition to be a reflective type of nostalgia.

Another section is a room dedicated to Yugoslav media. The walls of the room are decorated with the prints from the different newspapers. The center of the room is occupied by the table on which dozens of Yugoslav magazines are placed. Each visitor is welcome to spend as much time as he wants by viewing comics, daily newspapers or soft pornography. Such participation contributes to forming a closer attachment with the given period of the history and, therefore, more attention should be given to it.

Innovative forms of participatory activity

During our observation, the exhibition was used as an active and lively space of different forms of participatory communication. Visitors were invited to try, taste, smell, check, hear, and experience the issues of the each section.

The composition of visitors cannot be homogenized and consisted of very different age and social groups. A company of three young female students was using their smart phones to take produce selfies; the Yugoslav artifacts or the whole context of the section were used as a background. Simultaneously, several families and elderly couples were reading each plaque they encountered on their way through the education space.

The basement floor functioned as a store, selling Yugoslav-related goods and unconnected products, such as handmade apparel and accessories. In addition to the commercial offers, one found the continuation of the exhibition space, which portrayed a typical Yugoslav classroom. Different creative forms of participation activity were offered, such as the possibility to wear parts of a Pioneer uniform, perform as a teacher or pupil near the blackboard, and experience sitting at the desk and filling copybooks (Pic.3).

Picture 3: Participation activity, section of the exhibition



While traditional museums are usually working with two or three basic biological types of perception (visual, auditory and sometimes tactile perception), this exhibition expanded the interactivity with the gustatory and olfactory types of biological perception. The organizers created a space with a broad number of interactive possibilities: from the promotion of the “Yugoslav policeman” in front of the building to the “authentic” Belgrade sausage kiosk selling popular Yugoslav era food. The promotion of Yugo-nostalgic affiliation, the selectivity of issues for representation, together with contemporary methods of communication

generate the trend of the simplification of the past together with its deeper digestion.

We have described gustatory type: selling and tasting food; the olfactory type means the usage of the smell as an element of the representation. One of the sections dedicated to “The smells in Yugoslavia” invited the visitor to experience the smell of the everyday life, such as the smell of burnt milk, bread from the bakery or chewing gum. As the types of aroma connected to body care, famous perfumes such as Bulgarian Rose, Pino Silvestre or the after-shave lotion Brion were offered.

Altogether, smells construct a new dimension of the perception of the Yugoslavia and enable the reinforcement of ideas and stronger imaginary ties with the former historical epoch.

Yugoslav passport as the nodal element

The distinctive nodal point of the exhibition concept may be understood through a significant material element in the system of Yugo-nostalgia: the Yugoslav passport. The accentuation of this element and its placement gold frame confirms our statement. The plaque, dedicated to the frame is titled ‘The father of all passports’ (Pic. 4).

Picture 4: Yugoslav passport, plaque from the exhibition



The text that accompanies it is the following:

“Average Yugoslav had what no Russian or American had: a passport with which he couldn’t go only to Greece [sic] (due to the dispute about the name of Macedonia), Albania (because of

stubborn Enver Hodza) and to an insignificant number of destinations, in which not many persons were interested.

“Red passport of SFRY represented the zenith of diplomacy during the cold war and the world divided into blocks. It represented the best ranked passport on the black market, where its price reached the unbelievable amount of 10,000 American dollars”.

The connotation of the text affiliates the link with geopolitical discourse, the discourse of illegal economics, and the discourse of supremacy. The first is represented by phrases such as “zenith of diplomacy” with which the Serbian exhibition specifies Russia and the USA as the most relevant countries for reference and comparison; the second shows the relevance of the non-formal forms of economic activities (the black market), and mentions the better position compared to the countries-polarities (Yugoslav had what no Russian or American had) and the title (“The father of all passports”) constructs the discourse of supremacy and symbolic dominance.

The passport works as an element of collective fetishism, as the absorption and material symbol of the utopian world of the “golden age”, which is appealing to shared frameworks of memory. We do not consider the illustration of the passport to be a representation or confirmation of the historical period, because any artifact is dependent on the interpretative context or, in other words, to the discursive regime

into which it is included. The Yugoslav passport, like any other element, could have become the symbol of oppression, authoritarian rule, backward aesthetics or anything else if included in a different contextual framework.

Conclusions

The title of the exhibition, which contains a reference to the “positive” image of the subject of its representation, puts itself simultaneously into a concrete frame of collective memory entitled “Yugo-nostalgia”. From the analysis of the plaques and the visual analysis of the exhibition, we have identified the given exhibition to be reflective nostalgia. The irony and reflexivity were the main elements that showed its anti-restorative nature. However, the difference between history and nostalgic representation is grounded in the selectivity of the facts and exclusion of the conflict-based memory. The utopian “national belonging” is portrayed as a conflict-free and closed period, carried by Yugoslav citizens who homogeneously shared the same beliefs, norms and traditions (Duyvendak (2011): 84). Such an image is constructed through, first of all, the dominance of the everyday life narrative, such shopping, work, the daily mail, or music. This exhibition, in this regards, may be identified as aesthetic nostalgia (Volčič (2007)), because it

attempts to preserve the culture of the Yugoslav period by displaying its media, music or design.

Another important characteristics of the given exhibition, which places it into a nostalgic context, is its commercial aspect. Commercialization is the leading aspect of the nostalgia when the past is transformed into a publicly traded commodity (Radstone (2007): 112). The commercial aspects were described by Volčič (2007), Velikonja (2008), Radstone (2007), Bancroft (2009) and others and are congruent with our observations. The exploitation of the Yugo-brand through commercial offers, such as the sausage kiosk or Tito statuettes, creates a world of “materialized nostalgia” (Bancroft (2009): 13). From another side, the re-actualization of the former period of the common history through the selected positive image represents the need for a revision of the existing narrations dedicated to the interpretation of the past. Simultaneously, the vitality of the utopian discourse indicates the dissatisfaction with the contemporary aspect of the living conditions, politics or economy. In the framework of the given study, we aimed to represent the new trend of Yugo-nostalgia in the form of a case study. We see our study as a small contribution to the analysis of the complex and diverse phenomenon. Further research on the relation between nostalgia and the political dissatisfaction may contribute to the understanding of basic patterns of political perception in Serbia. Such findings may become the logic development of this study.

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Corporate social responsibility (CRS) system and practice of Chevron Vigeria Limited in the Niger Delta

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Abstract

This study examined the corporate social responsibility (CSR) system and practice of Chevron Nigeria Limited in the Niger Delta. The data utilized in the study were derived from both primary and secondary sources. While the primary data were obtained through focus group discussions, the secondary data were sourced from relevant textbooks, journals and corporate documents. The findings of the study indicated that the pre-disposition of Chevron Nigeria Limited to CSR in the Niger Delta oil-bearing community is poor. The findings of the study also revealed that the organization has a fairly low level of commitment to corporate social responsibility in the oil-bearing communities in the Niger Delta region where it operates. The findings of the study equally showed that the attitude of Chevron Nigeria Limited typified by the relatively poor levels of pre-disposition and commitment to corporate social responsibility in the host communities of the Niger Delta has not only largely influenced, dictated and defined the existing CSR culture, it has also been affected

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by the poor leadership and development climate created by the Nigerian state. Finally, the study made some useful recommendations including the exigency of recognizing and accepting corporate social responsibility culture and practice as a going concern by oil multi-nationals and the integration of CSR into the decision-making processes of the multi-national oil conglomerates.

Keywords: Corporate social responsibility, attitudinal pre-disposition, commitment, Chevron, Niger Delta.

Introduction

Corporate Social Responsibility (CSR) is a controversial issue that has captured the attention and interest of business managers and consultants, professionals, government administrators and agencies, academics, researchers and consumers (Davidson, 2011). There is, in fact, an increasing focus on the need for both business and government sector organizations to take concrete and proactive steps in the area of corporate social responsibility. Government and shareholders alike challenge public and private organizations to show more interest in and play social responsibility roles at the local, national, regional and global levels (Levin, 2012). The challenge focus on critical areas like

environmental protection and management, education, health and safety, community development, human resource management, employment generation, women and youth empowerment as well as general infrastructure.

The challenge of corporate social responsibility also demands voluntary action by business organizations to demonstrate responsible behaviour by responding to social and environmental issues and corporate leadership by the public sector that is expected to utilize various policy tools to encourage corporate social responsibility and behaviour in society. The corporate social responsibility strategy or tool is in tandem with the principle of environmental justice that seeks to achieve an accommodation or balance between environmental costs or burdens and environmental benefits (Ejumudo, 2010). This growing concern for the use of CSR as a veritable tool for the private sector to take a lead in addressing those issues that the government at different levels has not been able to provide adequate solution has been highlighted in the literature on corporate ethics and management (Walton, 2013).

The importance of corporate social responsibility in developing countries like Nigeria cannot be over-emphasized. The truism of this assertion is evident in the reasoning that CSR can perform the dual role of compensating the operating environment of multi-sectorial stakeholders and complementing the process of closing the existing developmental gaps as Ejumudo (2014) succinctly posited. The imperative and inevitability of corporate social responsibility practice in Nigeria's Niger

Delta region with its myriad of environmental devastation, socio-economic dislocation and impoverishment, long history of neglect and multi-faceted developmental problems is even more compelling. Equally worrisome and compounding the developmental challenge in the rich-oil region is the largely failed developmental efforts of Nigeria's interventionist agencies like the Oil Mineral Producing and Development Commission (OMPADEC) and the Niger Delta Development Commission (NDDC).

At the heart of the efficacy of the corporate social responsibility philosophy and practice in Nigeria and particularly its Niger Delta region as well as other developing societies in the globe is the entrenched attitude and ingrained culture of governmental institutions, business organizations, non-governmental groups and individuals. This notable reality implies that the efficient and effective operationally, functionality and workability of CSR transcends beyond merely recognizing and accepting corporate social responsibility as a social philosophy to integrating same into the mentality, decision making processes attitude and culture of sundry organizations and individuals. The pragmatic success of CSR therefore depends largely on actions, activities and practices that reflect discernable high-level commitment, positive predisposition and genuine in-grained culture.

Despite the seeming usefulness and applicability of corporate social responsibility, opinions and views range from the position of the purely competitive economic model to the philanthropic parlance of social

activists who are largely concerned with social goals. While proponents of CSR argue that in so far as business organizations benefit in diverse ways by operating with a perspective that is broader, larger and longer than their own immediate, narrow and short-term profits, the critics posit that the philosophy distracts from the fundamental underlying economic role of organizations and therefore a fraudulent move by the government to abandon its responsibility to the state (Watson, 2012). In between these two strands of argument and practice, there exist several CSR permutations and approaches as Ejumudo (2010) explicitly stated.

The contention in this study is that the major factor constraining the efficient and effective corporate social responsibility practice in Nigeria's Niger Delta is the attitudinal predisposition and commitment level of the multi-national oil companies operating in the region accentuated by the poor leadership and developmental environment created by the Nigerian state. Arguably, it is largely the nature and character of organizational predisposition and commitment to corporate social responsibility that determines the ensuing CSR culture and practice that will permeate the system and influence its human operators.

Statement of the Problem

Statement of the Problem

Arguably, while the need for corporate organizations to be socially responsible is not in doubt, corporate social responsibility practices suggest that most organizations are yet to imbibe CSR as a culture and take concrete steps to integrate it (CSR) into their decision-making processes (Abrahamson, 2012).

In the Niger Delta region of Nigeria, the argument for corporate social responsibility seems very compelling. This view point is premised on the understanding that CSR is expectedly supposed to play a critical role in closing the development gap necessitated partly by the degrading and devastating operations and activities of multi-national oil corporations that started in 1956 when the then Shell–British Petroleum (BP) struck oil in commercial quantities at Oloibiri in the Niger Delta after an investment of more than N30 million in 1950 (Aturu, 2007). All the same, corporate social responsibility practices in Nigeria, especially in the Niger Delta region, seemingly shows that there exists a weak CSR culture and poor response to corporate social responsibility issues and concerns.

Nwachukwu (2001), for instance, attributed the neglect of social responsibility in Nigeria to the relative small size of Nigerian business organizations, large number of foreign enterprises, lack of professionalism in management style, the expectation of the Nigerian society and the fact that large enterprises belong to the society. Assessing corporate social responsibility of the oil companies in Nigeria, Yomere (2002) also argued that multinational oil companies are nonchalant toward the legitimate demands from their host communities and they employ divisive strategies. Examining the corporate social responsibility problematic in Nigeria, Adewale (2011) equally lamented the poor response to CSR issues by business organizations and posited that the efforts of corporate organizations in compensating their operating environments through developmental projects have been largely inadequate.

At the heart of the corporate social responsibility problem in the Niger Delta region of Nigeria, it is argued in this study, is the poor predisposition and poor commitment to CSR issues and concerns by the oil multinational companies operating in the region as well as the poor development environment created by the Nigerian state. This study therefore examines the corporate social responsibility activities of Chevron Nigeria Limited in the Niger Delta.

Objectives of the Study

The objectives of the study are:

1. To assess the impact of the predisposition of Chevron Nigeria Limited (CNL) to CSR on its corporate social responsibility activities in the Niger Delta.
2. To examine the impact of the commitment of Chevron Nigeria Limited (CNL) to CSR on its corporate social responsibility activities in the Niger Delta.
3. To investigate the impact of the poor leadership and developmental environment created by the Nigerian state on the corporate social responsibility activities of Chevron Nigeria Limited (CNL) in the Niger Delta.

Research Questions

1. Is there a significant relationship between the predisposition of Chevron Nigeria Limited (CNL) to CSR and its corporate social responsibility activities in the Niger Delta?

2. Is there a significant relationship between the commitment of Chevron Nigeria Limited (CNL) to CSR and its corporate social responsibility activities in the Niger Delta?
3. Is there a significant relationship between the poor leadership and developmental environment created by the Nigerian state and the corporate social responsibility activities of Chevron Nigeria Limited (CNL) in the Niger Delta?

Research Methods

This study adopted a qualitative case study method. This research method, according to Yin (2003), has three aspects viz: investigation of a contemporary phenomenon within its real life context, the existence of boundaries between the phenomenon and the real life context and the use of multiple sources of evidence. The qualitative case study method also lends itself to exploratory, descriptive and explanatory methods. Yin emphasized that exploratory research attempts to find out about a situation, while the descriptive and explanatory research types respectively seek to know “what happened” and how and “why it happened.” This study which examines the corporate social responsibility practice of Chevron Nigeria Limited in Nigeria’s Niger Delta region utilized both primary and secondary sources of data.

Primary Data

The primary data utilized in this study were derived from focus group discussion sessions conducted by the researcher. Whether to test ideas for new projects, to uncover attitudes to volunteering or understand the needs of the community, focus groups are a straightforward way for research into topical issues that can benefit from the vast ideas and experiences of experts and significant others from different or related fields of study. Focus groups have proved to be a highly insightful research technique for engaging a group of people with a question, product or idea. Bringing together a group to discuss a particular topic provides a more natural setting than one-to-one interviews, as it allows participants to share their ideas and experiences and through discussion new strands of thought can emerge (Stone, 2013). This qualitative research method can generate rich data in a less resource intensive manner than interviewing. Using focus group discussion technique to engage with questions of local, national or global significance can form part of the design process of a wider survey, or it can uncover the opinions of key stakeholders.

In order to ensure the fruitful use of the focus group discussion (FGD) technique, a topic guide was planned in advance and the areas for discussion were outlined with key ideas and questions to be discussed. The topic guide was constructed with some degree of flexibility because the topics may be covered in a different order. To guarantee robust and insightful discussion sessions, the mix of individuals that participated

was carefully determined by the researcher who facilitated during the discussion sessions. The importance of this approach is evident in the fact that more interesting ideas can emerge from a diverse range of individuals, as their experiences and attitudes may be broader as Bolt (2011) rightly articulated.

Four sessions were conducted with four different groups made up of seven (7) participants each. There is no optimal number of participants advocated in the literature, but in order to fully involve every participant and avoid uncontrollable discussion sessions, Frich-Lyon, (1981) recommended 8-12 participants, Viassof (1990) recommended 6-12 participants, Oke and Oluwadare (2002) recommended 5-8 participants and Andrew (2010) recommended 6-8 participants. In this study, the researcher used seven (7) persons.

Three of the four groups were made up of executive committee members who are equally leaders of oil-bearing communities under the Itsekiri Regional Development Council, Egbema/Gbaramatu Regional Development Council and Ilaje Regional Development Council, while the fourth group comprised of senior staff members of the Public Affairs Department of Chevron Nigeria Limited. The four FGD sessions were conducted in four different days during the month of September, 2014. Before the FGD commenced, the researcher discussed fully the issues with the participants to ensure they clearly understood them. The discussion was guided by the selected topic "Chevron Nigeria Limited and Corporate Social Responsibility in Nigeria's Niger Delta region" and it

was introduced by the researcher as the facilitator. Different questions relevant to the above topic were asked and the discussions took place in a friendly and productive manner with an observer in each of the three focus group discussion sessions.

Secondary Data

The secondary data in this study were derived through the content analysis instrument. This instrument was utilized in collecting relevant data from texts, journals, newspapers and magazines in an analytical manner that is fruitful for the study. Content or textual analysis enables a researcher to carry out an in-depth analysis of existing data and to provide explanation for them in a manner that is useful and fruitful as Richard (2012) rightly emphasized.

Data Analysis

Analyzing focus group discussions involve firstly revisiting your aims and objectives and looking through the detailed notes or a full transcript if you have had the time to produce one. The analysis is aimed at identifying key themes and points of consensus or disagreement as well as noting useful quotations which reflect the purposes of your research

(Woods, 2012). In this study, all the notes taken at the focus group discussion sessions were read and transcribed. The transcribed versions of the focus group sessions were compared with the notes taken during FGD sessions to fill the identified gaps. The consensus in the opinions and the commonality in the ideas expressed and presented during the focus group discussion sessions constituted the basis for answering the research questions raised in this study. This process was supported with the qualitative data generated in the study through in-depth content analysis of cognate text books and journals (Richard, 2012) premised on the thematic discourse "Chevron Nigeria Limited and Corporate Social Responsibility in Nigeria's Niger Delta region".

Corporate Social Responsibility: A Conceptual Understanding

Corporate social responsibility (CSR), also known as social responsibility or corporate citizenship is the obligation of decision-makers to take actions that protect and improve the welfare of society as a whole along with their own interest (Aswathappa, 2012). It is a concept whereby organizations consider the interest of society by taking responsibility for the impact of their activities on environmental stakeholders like customers, suppliers, employers, shareholders, communities and significant others (Aswathappa, 2012). It can also be viewed as the responsibility to plan and manage organizational relationships with all those involved in and affected by its activities (Ajala, 2005). It is equally a

devise that encourages private, voluntary and public sector organizations to take account of their economic, social and environmental impacts and take complementary action to address key challenges based on their core competencies locally, regionally, nationally and internationally. In his own thinking, Ezeani (2006) noted that corporate social responsibility has to do with how an organization responds to its employees, shareholders and host communities as well as the code of conduct expected from both the management and other employees within the organization.

In the same vein, corporate social responsibility refers to management's consideration of the social as well as economic effects of its decisions (ACCA, 2007). Corporate social responsibility is essentially the voluntary action that organizations can take, over and above compliance with minimum legal requirements to address both its own competitive interests and the interest of the wider society (Webb, 2012). It is, by implication, the way that organizations contribute to sustainable development goals by taking account of their operations that are geared towards maximizing benefits and minimizing downsides for the good of society.

Ejumudo (2010) also posited that corporate social responsibility is the socially responsible and voluntary thinking, philosophy and practice that engenders the concern for private, voluntary and public sector organizations to be sensitive to and seek a balance between the actualization of their micro goals and the macro goals of the larger

society for the purpose of development on a sustainable basis. Kotler (2005) opined that corporate social responsibility is a commitment to improve community well-being through discretionary business practices and contributions of corporate resources. A key element in this definition is the word discretionary. It is not referring to business activities that are mandated by law or that is moral or ethical in nature and therefore expected, but the voluntary commitment a business makes in choosing and implementing these practices and making these contributions. Such a commitment must be demonstrated in order for a company to be described as socially responsible and will be fulfilled through the adoption of new business practices and contributions either monetary or non-monetary.

Corporate Social Responsibility as a Philosophy

Philosophical movements like scientific management and human relations have influenced business concerns. The earlier social philosophies of business attempted to explain or rationalize the existence of the business organizations as a profit making institution (Unamka and Ewurum 2011). According to them, the objective of profit maximization can be achieved through the process of traditional analysis and that profits are at a maximum in line with the traditional economics at the point where a firm's marginal cost equals its marginal revenue. The philosophy of social responsibility tends to subordinate the idea of

maximum profits to the performance by business of a worthwhile role in society (Bello, 2010). Organizations have resultantly felt the power that public opinion can wield in determining survival and respond with increasing social awareness both inside and outside the organization. One reason why the philosophy of social responsibility is gaining currency is the acceptance of the idea that organizations by fighting to correct social inequalities today, it is ensuring that an environment in which it will operate profitably in the future exists (Unamka and Ewurum 2011). For example, by training and educating the poor and hard-core unemployed, organizations are helping to create a new pool of labour for employment in the future and new purchasers for its output.

The Strategic Importance of Corporate Social Responsibility

The traditional conception of business organizations is that their main function is to create value through the production of goods and services that the society demands so as to generate profit for its owners and shareholders as well as welfare for society particularly through an on-going process of job creation (Webb, 2012). All the same, new social and business realities and pressures are culminating in a change in the values, orientation and horizon of business activities. This development has necessitated the recognition among business organizations, policy makers and other stakeholders of corporate social responsibility as an important element of new and emerging forms of governance that can

help them to respond to fundamental changes that are germane for the growth, renewal and development of societies (Bello, 2010). A graduation from the past into the present understanding of CSR is the desirability and necessity for organizations to adopt and apply strategic management techniques and instruments which means a business approach that puts the principle of continuous improvement and innovation at the heart of organizational strategies, operations and activities.

Also, because of the volatile, hostile and dynamic nature of the environment of organizations, a central social responsibility of management is to be cognizant of the factors that can influence the effectiveness of the organization. The inputs of resources needed for output creation are obtained from the environment and the outputs of organizations are exchanged with consumers in the environment (Webb, 2012). A system view of the interactions between organizations and their environments is useful as Bello (2010) clearly highlighted. And the onus of constantly meeting the different wishes or satisfying the aspirations of their various publics which they serve rest upon the managers. Some of such publics are employees, governments, customers (customers), communities, competitors, creditors and the public at large. The responsibility of management is thus necessarily social to the extent that these publics have their goals. This brings into view the importance of environmental scanning by organizational managers so that they can take appropriate decision that will enable them achieve their short-term and long-term objectives including

interacting with and serving the various publics in the environment. The publics, according to (Pickle and Abrahamson 2012) include customers, employees, suppliers, creditors, communities, governments and competitors.

Attitudes: A Conceptualisation

Conceptualising attitude is no doubt a herculean task. This is because of the complexity involved in any attempt at a definition of such a concept, which has been described as the “fly-wheel” of social psychology (Robbins, 2012). Notably, the derivation of the word “attitude” creates real problems of definition. It was derived from the Latin word “aptus” meaning fitness or adeptness and was thus defined as a subjective or mental state in preparation for action. The word “aptus” was first used by Herbert Spencer in 1862 to describe a mental concept (Robbins, 2012).

Rao and Narayana (2007) viewed attitude as an internal state of a person that is focused on objects, events and people and it can exist in the person’s psychological world. According to them, an individual’s behaviour is also a function of attitudes and it is a cognitive element. They asserted that an individual’s attitude towards any object is indicative of his apathy or enthusiasm towards the said object. They also opined that attitude could in a simplistic parlance be described as

the way we feel about something. They added that a notable feature of attitude is that, it varies in direction (favourable – unfavourable), intensity (how strongly they are held) and the extent of consciousness (awareness of any individual concerning his attitude).

In his own thinking, Kolasa (1998) stressed that attitude is a pre-disposition to respond to certain set of facts. Building upon this premise, Mitchell (2000) stressed that attitude has to do with a pre-disposition to respond in a favourable or unfavourable way to objects, persons, concepts, etc. as the case may be. From this definition, three assumptions can be made. First, attitude is related to behaviour and based upon one's inclination to something, and an individual is pre-disposed to behave in a particular way. Second, attitude is tied to one's feeling about an object. Third, attitude is a hypothetical construct, that is, something which one carries around. Although, the consequences of attitude can be observed, attitude itself may not. Also, Conor (2003) stated that attitudes have to do with our feelings, thoughts and behavioural tendencies towards a specific object or situation.

Raising some of the objections which are inherent in the concept of attitude, Fishbein and Ajzen (2003) came up with an alternative definition. According to them, attitude can be described as a learned pre-disposition to respond in a consistently favourable or unfavourable manner with respect to a given object. Although the core of this definition is the same as that of Mitchell, Fishbein and Ajzen have, in addition, introduced the notions of learning and consistency. Bothered

by the problems involved in conceptualising attitude, Atkinson and Atkinson (2005) emphasized that a precise definition of attitude is difficult. This, they, attributed to the conviction that attitudes overlap with other kinds of psychological preparation for response. They further added that attitude represents both an orientation towards or away from any object, concept or situation and a readiness to respond in a pre-determined manner to such or related objects, concepts or situations. In their perception, both orientation and readiness to respond have emotional, motivational and intellectual aspects and they may in part be unconscious.

In spite of the controversy that efforts at conceptualising attitude have generated, attitude is still one of the most distinctive and indispensable concept in contemporary social psychology as Allport (2005) clearly articulated. In fact, the disagreement over the direct relationship between attitude and behaviour notwithstanding, majority of social psychologists agree that there exists a relationship. They are, however, of the opinion that the relationship is somewhat more complex than was originally thought of. From the foregoing, it can be inferred that social psychologists perceive of attitude as an internal and mental state of readiness as well as an orientation with a pre-disposition to respond in a favourable or unfavourable manner towards any object, person or situation.

Having attempted an extraction of a general conception of attitude from a seemingly varying, yet convergent ideas and views expressed by

different social psychologists and theorists, it is necessary to add that, for purpose of this study, attitude is conceptualised as pre-disposition and commitment towards corporate social responsibility in Nigeria's Niger Delta by Chevron Nigeria Limited (CNL). The importance of this conceptualisation rests primarily on its contextual definitional specificity as opposed to the rather relatively generic idea or conception of attitude. While pre-disposition in this context refers to inclination, readiness and support for corporate social responsibility, commitment has to do with the orientation towards and consequently, the identification with, involvement in and support for corporate social responsibility in CNL

The Relevance of Attitudinal Pre-disposition and Commitment to the Effectiveness of Corporate Social Responsibility

Attitudinal pre-disposition and commitment are very critical to the effectiveness of corporate social responsibility in organisations, institutions, societies and environmentally degraded and developmentally deficient regions like Nigeria's Niger Delta. This is because the pre-disposition and commitment of organizations such as multi-national oil corporations to CSR may seriously enhance or constrain its effectiveness in the organizational environments where they operate.

In order to make the discourse of the relevance of attitudinal pre-disposition and commitment to the effectiveness of corporate social responsibility meaningful and useful in this study, two attributes or indicators of pre-disposition and three attributes or indicators of commitment as identified by Ejumudo (2010) have been adopted. The attributes or indicators of pre-disposition are: the degree of self-awareness about the value and potential benefits of corporate social responsibility as well as support and co-operation, while the attributes or indicators of commitment are: level of participation, supportive organisational climate and level of resources

Attributes of Pre-Disposition

Degree of Self-Awareness about the Value and Potential Benefits of Corporate Social Responsibility

This attribute has to do with the realisation and consciousness of the purpose and value of corporate social responsibility plans, schemes and projects. Such a realisation and consciousness about the value and potential benefits of corporate social responsibility by organizations like SPDC and CNL in oil-bearing and environmentally devastated regions such as the Niger Delta is not only a reflection of a

favourable pre-disposition, it (the pre-disposition) is also crucial for the success and effectiveness of CSR plans and programmes. It therefore implies that, CSR plans and schemes can hardly be successful and effective if organizational actors do not see the benefits that will flow from them. Thus, there is the likelihood that such a pre-disposition may stifle corporate social responsibility plans and resultantly work against good company/ community relations.

Support and Co-operation

Support and co-operation by organizational actors is essentially a corollary of the degree of self-awareness about the potential benefits and value of corporate social responsibility plans, schemes and programmes. This is because self-awareness and consciousness by organizations about the value and purpose of corporate social responsibility will necessarily produce support and co-operation in respect of the CSR plans. Therefore, support and co-operation by organizations and their actors is critical to the efficacy of CSR plans, schemes and activities.

The critical role of self-awareness and realisation of the value and potential benefits of corporate social responsibility and the resultant

support and co-operation by organization like CNL for the success and effectiveness of CSR plans and schemes in the Niger Delta region of Nigeria cannot be over emphasised.

Attributes or Indicators of Commitment

Level of Participation

Of all the attributes of commitment adopted and considered in this study, the level of participation can be said to be very important and crucial to the effectiveness of corporate social responsibility by Chevron Nigeria Limited (CNL) in the Niger Delta region of Nigeria like any other region in the world. Participation, in this context, has to do with involvement and it consists of inter-related elements which manifest in the decision-making processes of any organisation in a wide variety of ways (Ejumudo, 2010).

Evidently, one of the ways by which multi-national oil corporations like CNL can communicate its commitment to corporate social responsibility activities, is to be involved. Involvement in this context connotes continuity and it is borne out of the realization by oil conglomerates in Nigeria of the importance of corporate social responsibility activities in their areas or regions of operation. It therefore follows that it is not enough for organizations to say that corporate social responsibility is

good without taking the lead, by showing good example. Such exemplary actions are necessarily indicative of their supportive attitudinal commitment to the task of corporate social responsibility. In fact, participation by organizations in corporate social responsibility should not terminate at the level of handing down policies; organizations should equally be concerned about the implementation of CSR policies and plans as well as the evaluation of CSR results. Thus, lack of participation by organizations has the potency of constraining the effectiveness of corporate social responsibility.

Supportive Organisational Climate

This attribute of commitment refers to the environment in which corporate social responsibility plans, programmes and activities are executed. It (organisational climate) also has to do with a set of characteristics which are relatively enduring over time, typifying an organisation and distinguishing it from other organisations as Knowles (2010) clearly expressed. Such a set of characteristics create a distinctive atmosphere or climate within any organisation and it has the tendency of influencing the attitude of its (the organisation) members as Pritchard and Karasick (2011) as well as Forehand and Gilmer (2012) rightly noted. The kind of organisational climate in which corporate social responsibility is conducted is therefore critical to its (CSR) effectiveness.

Essentially, corporate social responsibility is most likely to succeed and be effective, if it is conducted in an atmosphere of trust and support. It is instructive to assert therefore that more important than the people who conduct and execute CSR plans and programmes, is the organisational climate in which it occurs. Such a climate has to be created by top management in any organisation, if corporate social responsibility plans and programmes are to achieve the desired results. Evidently, top management cannot create such a supportive organisational climate, unless a tradition is established whereby they (top management) truly accept CSR as an integral part of the organization corporate plan and resultantly one of their prime responsibilities. The absence of such a supportive organisational climate will naturally undermine the efforts of organizations in the area of efficient and effective CSR practices.

Level of Resources

Resources, here, refer to both money and relevant projects and schemes (Knowles, 2012). Also, the amount of resources ploughed into CSR plans and programmes is necessarily a reflection of the level of commitment by organizations with in-grained corporate social responsibility culture. Therefore, since CSR is an investment in the light of compensation to host communities in the operating environments of both oil and non-oil related organizations for which returns in the context of good

company/community relations are expected. Notably, the commitment of organizations to CSR can be deduced from the amount of backing for the plan, not only with respect to money, but tangible developmental projects and schemes as well. Commitment on the part of organizations in terms of resources availability and development projects and schemes, will not only filter down the organisational hierarchy, but it is crucial for the success and effectiveness of CSR plans and practices.

Theoretical Framework

Although there exists several theories for explaining the facts generated in corporate social responsibility studies such as the artistic-culture, vendor, investment, household, austere and civic, the investment and civic theories have been adopted for this study.

The investment model of Anderson (1989) justifies the involvement of organizations in social problems on the basis of a cost-benefit comparison. This view encompasses the doctrine of enlightened self-interest and recognizes that if the corporation is to survive beyond the predictable tomorrow into the uncertain future, relations with institutional investors, industrial buyers and the organization at large must be viewed as more than transitory. The theory adds that temptations to make the fast buck must be weighed against a possible loss of good will. Such considerations are relevant when considering

contributions to higher education, which has recognized long-term indirect benefits (Anderson, 1989). The investment model believes that organizations should involve themselves in social problems that go beyond the self-interest of profit making and this view is in tandem with standard corporate social responsibility culture (Anderson, 1989).

The civic model of Eddyson (1992), on the other hand, holds that the corporation must play the role of a good citizen who volunteers service to the community in advance of and to avoid being drafted. Serious considerations, the theory asserts, should therefore be given by managers in compliance with government requests for voluntary restraints to lower spending in order to reduce inflationary pressures and balance-of-payment problems (Eddyson 1992). In line with this theory, a commitment is given to support the political system of democracy by helping to alleviate unemployment during depressions and entering into discussions of social issues; an awareness of possible social cost. The civic model is also very useful for it underscores the need for organizations to have a moral conscience and act responsibly in line with the ethics of corporate social responsibility.

A mix of the investment and civic theoretical perspectives is very realistic largely because it provides a utilitarian basis for adequately explaining the facts generated in corporate social responsibility concerns like this study, which neither of the two theories possess. Moreover, the complementary role of a blend of the two theories is at the heart of the philosophy and practice of sustainable development initiatives and

enterprises that is predicated on partnership and collaboration by public, private and voluntary groups.

Discussion, analysis, conclusion and recommendations

Discussion

The discussion aspect of the section three of this study is done in a manner that the issues raised, the views expressed and the commonality in the points made during the four focus group discussion sessions reflect the three major specific objectives in this study. As stated in section one, the objectives of the study are to: assess the impact of the predisposition of Chevron Nigeria Limited (CNL) to CSR on its corporate social responsibility activities in the Niger Delta; examine the impact of the commitment of Chevron Nigeria Limited (CNL) to CSR on its corporate social responsibility activities in the Niger Delta and investigate the impact of the poor leadership and developmental environment created by the Nigerian state on the corporate social responsibility activities of Chevron Nigeria Limited (CNL) in the Niger Delta. In order to accomplish the above-stated objectives, relevant data were derived through focus group discussion instrument. Accordingly, since the scope of the study is Delta and Ondo State operational areas of

Chevron Nigeria Limited, three focus group discussion sessions were conducted. Each session involved seven executive committee members/community leaders from the Itsekiri Regional Development Committee (RDC), Egbema/Gbaramatu Regional Development Committee (RDC) and Ilaje Regional Development Committee (RDC).

While the Itsekiri RDC is made up of twenty-three oil-bearing and impacted communities: Ajudaibo, Aja-Amita, Bateren, Deghele, Ebrohimi, Eghoro, Gbokoda, Ijaghala Jakpa, Kolokolo, Madangho, Omadino, Ode-Ughorodo, Ogidigben, Obaghoru, Sagharatie, Tebu, Tisun, Usor, Udo, Ugboegungun, Ugboegin, Ureju, the Egbema/Gbaramatu RDC is comprised of twenty oil-bearing and impacted communities: Dumok, Opia/Ikenyan, Dinkoru, Ogbudugbudu/Adagbarasa, Tsekelewu, Polobubor, Opuama, Benikrukru, Makaraba, Gbaramatu, Kokodiagbene, Kenyagbene, Okoyitoru, Polobubou, Tebujor, Opuedebubor, Okifamba, Ogbinbiri, Ikpopko, Pepper-Ama and the Ilaje RDC is made up of eight oil-bearing and impacted communities: Awoye, Molutehin, Jirinwo, Odofado, Gbagira, Messe, Opoakaba, Akinsolu.

In addition to the above three focus group discussion sessions with the Itsekiri, Egbema/Gbaramatu and Ilaje RDCs, a fourth focus group discussion session was conducted with seven senior staff of the Public Affairs Department of Chevron Nigeria Limited. This fourth session provided the opportunity to have a balanced understanding of CSR plans and activities of CNL in the selected oil-bearing and impacted communities from both the community and CNL perspectives.

In respect of the first objective of this study: to assess the impact of the predisposition of Chevron Nigeria Limited (CNL) to CSR on its corporate social responsibility activities in the Niger Delta, the three separate focus group discussion sessions with community leaders of the Itsekiri, Egbema/Gbaramatu and Ilaje Regional Development Committees (RDCs) revealed that before 2005, the CSR policy of Chevron Nigeria Limited provided for a skeletal assistance to the oil-bearing communities in its operational areas. This policy direction, in line with the views expressed by the discussants, favored schemes and projects like secondary and university scholarships, town-hall and class-room block construction solely determined by CNL without any needs assessment involving the beneficiary communities. The discussants also noted that CNL's CSR policy included selective settlement of some community leaders to the detriment of the community development philosophy they were expected to pursue. The old CSR regime, according to the discussants, was prone to crisis precipitation.

Although the focus group discussion participants from the Itsekiri, Egbema/Gbaramatu and Ilaje Regional Development Committees noted that the new CSR regime that commenced in 2005 introduced the Global Memorandum of Understanding process between CNL and its oil-bearing and impacted host communities with improvement in funding through the discretionary annual contributions of the company, they observed that the funding level is still somewhat inadequate. Under this

new regime, ten percent of the total annual fund provided by Chevron Nigeria Limited was between 2005 and 2008 allocated to General Administration, with the remaining ninety percent earmarked for community development project. With the present arrangement that commenced in December 2008, General Administration takes fifteen percent, while projects receive eighty-five percent of the funds provided annually by CNL

The discussants stressed that with the present improved funding level that enabled the communities to participate in the determination of the projects that were and are to be fully executed by them, it will be difficult for the RDC's to carry out mega projects like sand-filling, canalization, shore protection, electricity, water and the like. Specifically, community leaders and discussants from the Itsekiri Regional Development Committee observed that a total of seventy projects were awarded for the 2008- 2010 project circles and the projects were mainly housing units spread across twenty-one communities. They further opined that although the projects are meaningful, they are not critical to the socio-economic reproduction by the indigenes of the beneficiary communities.

All the same, corporate social responsibility practices in Nigeria, especially in the Niger Delta region, shows that there exists a weak CSR culture and poor response to corporate social responsibility issues and concerns. Nwachukwu (2004), for instance, attributed the neglect of social responsibility in Nigeria to the relative small size of Nigerian

business organizations, large number of foreign enterprises, lack of professionalism in management style, the expectation of the Nigerian society and the fact that large enterprises belong to the society. Assessing corporate social responsibility of the oil companies in, the responses and views of the three discussion groups representing the Itsekiri, Egbema/Gbaramatu and Ilaje RDCs shows that in their assessment, CNL's predisposition to CSR in host oil-bearing communities was largely unfavorable. For instance, the level of funding provided by Chevron Nigeria Limited for community development projects, the discussants emphasized, was not only very poor and inadequate considering the basic survival and developmental needs of the poor and neglected environmentally degraded communities, it is equally a reflection of the level of consciousness by CNL of the potential benefits of CSR and their support for CSR schemes and projects in the oil-bearing host communities.

Concerning the second objective of this study: to examine the impact of the commitment of Chevron Nigeria Limited (CNL) to CSR on its corporate social responsibility activities in the Niger Delta. In line with the three indicators of attitudinal commitment (level of participation, level of resources and supportive organizational climate) as contained in section two of this study. In this direction, the community leaders and discussants from the Itsekiri, Egbema/Gbaramatu and Ilaje Regional Development Committees (RDCs) posited that Chevron Nigeria Limited has corporate social responsibility policy and participates in its CSR plan and programme through the provision of fund on an annual basis for the

execution of community development projects that are determined by the communities themselves and re-negotiation of the global memorandum of understanding process started by CNL in 2005, there is poor monitoring and evaluation practice. Worse still, there was agreement among the discussants about the level of funding provided by Chevron Nigeria Limited for CSR projects which in their opinion is inadequate. The poor level of funding, the discussants stressed, is evident in the under-development and poverty that has persisted in the oil-bearing communities. As a matter of fact, organizations that are genuinely committed to a well-crafted CSR policy and action plan should not only put in place the necessary machinery for monitoring the various stages of corporate social responsibility activities and projects, but should be committed to and be involved in a committee that will periodically review the progress of CSR in the light of its contribution to the development of the environment in which oil conglomerates exist and operate.

Below is a table showing the level of funding provided by CNL for both administration of the Itsekiri, Egbema/Gbaramatu and Ilaje RDCs and execution of community development projects and schemes:

YEAR	ITSEKIRI RDC	EGBEMA/GBARAMATU RDC	ILAJE RDC
2009	455,952,700	358,830,000	88,882,000
2010	557,610,000	450,030,000	105,282,800
2011	555,610,000	404,590,000	113,262,800
2012	560,872,123	520,684,109	141,403,360
2013	661,238,219	535,566,794	121,499,509
2014	661,238,219	542,566,000	121,499,509
TOTAL			

Source: Department of Public Affairs, Chevron Nigeria Limited, 2014.

As far as supportive organizational climate in relation to the CSR policy, plans and programmes of Chevron Nigeria Limited in the Itsekiri, Egbema/Gbaramatu and IlaJe host communities is concerned, CNL, according to the focus group discussants, has over the years provided some level of support in terms of finance, projects and programmes. The projects and programmes, the discussants emphasized, include town halls, classroom blocks, upgrade of schools and science laboratory, training centres, portable water, scholarships, employment (both main-stream and contract) and health care services. Typical examples of executed projects include the Benekrukru multipurpose town hall, Bateren walkway and jetty and Perowo portable water, the discussants added. All the same, while there was a congruence of opinion among the focus group discussants that the present CNL's community-driven development policy and strategy has significantly improved the

relationship between Chevron Nigeria Limited and its host communities, the level of development achieved so far is clearly low and below the expectations of the beneficiary oil-bearing and impacted communities. The level of commitment in the light of the environment in which CNL's corporate social responsibility plans, programmes and activities are executed is therefore, according to the discussants, relatively poor. Notably, atmosphere or climate within any organisation has the tendency of influencing the attitude of its (the organisation) members as Pritchard and Karasick (2011) as well as Forehand and Gilmer (2012) rightly asserted. The kind of organisational climate in which corporate social responsibility is conducted is therefore critical to its (CSR) effectiveness.

The absence of a highly supportive organisational climate, the focus group discussants posited, has largely undermined the efforts of CNL in the area of efficient and effective CSR plans and practices in the Itsekiri, Egbema/Gbaramatu and Ilaje oil-bearing and impacted communities.

In relation to the third objective of this study: to investigate the impact of the poor leadership and developmental environment created by the Nigerian state on the corporate social responsibility activities of Chevron Nigeria Limited (CNL) in the Niger Delta, the focus group discussants from the public affairs department of Chevron Nigeria Limited stressed that the operating environment (the Nigerian State) has become largely hostile and dis-enabling. They hinged their assertion on their argument that the Federal Government of Nigeria is failing to meet its own

obligations as far as the NNPC/CNL joint venture agreement and operation is concerned. To this end, the discussants noted that CNL's business fortunes are dwindling and this has resulted in cuts in its operations and staff size. In the same vein, the discussants opined that the leadership environment created by the Nigerian State and the absence of a genuine development agenda at the Federal Government level and among the Niger Delta States as well as their (Federal and State) development agencies like Niger delta Development commission (NDDC), Delta State Oil Producing Areas Development Commission (DESOPADEC) and Ondo State Oil Producing Areas Development commission (OSOPADEC) are constraining Chevron Nigeria Limited's genuine desire for and the actual CSR plans and activities. Moreover, the discussants emphasized that the Nigerian state and its multi-layered levels of government and their development agencies are, as a matter of obligation, required to initiate and execute development plans programmes and projects based on a genuine development agenda, while CNL is expected to support the development process in the Niger Delta so as to compensate its operating environment.

Analysis

The central aim and objective of the focus group discussions was to identify the key areas of consensus or disagreement among the discussants. In the above light The out-come of the three focus group

discussion sessions on different aspects of the central theme “Corporate Social Responsibility in Nigeria: A Study of Chevron Nigeria Limited in the Niger Delta” involving community leaders from the Itsekiri, Egbema/Gbaramatu and Ilaje Regional Development Committees shows that the pre-disposition of Chevron Nigeria Limited to corporate social responsibility plans and activities in the oil-bearing and impacted communities of the above regional development committees. All the discussants agreed that the level of funding provided by Chevron Nigeria Limited for community development projects, was not only very poor and inadequate considering the basic survival and developmental needs of the poor and neglected environmentally degraded communities, it is equally a reflection of the level of consciousness by CNL of the potential benefits of CSR and their support for CSR schemes and projects in the oil-bearing host communities.

In a similar vein, there was convergence of opinion by the discussants on the level of commitment by Chevron Nigeria Limited to its CSR plans and activities in the selected oil-bearing and impacted communities of the Niger Delta, which they had judged as poor. This poor level of commitment is evident in the level of participation by CNL in the development of the selected oil-bearing and impacted communities of the Niger Delta, the level of resources allocated for community development projects and programmes and the existing organizational climate in which the CSR plans, projects and programmes are executed.

Essentially too, the consensus in the opinions and the commonality in the ideas expressed and presented during the fourth focus group discussion session involving seven Chevron Nigeria Limited's representatives from its public affairs department revealed that the leadership and development environment created by the Nigerian state has largely affected the organizations business fortunes, scope of operations, staff strength and CSR plans and efforts.

From the foregoing, it is evident that there exist a significant relationship: between the predisposition of Chevron Nigeria Limited (CNL) to CSR and its corporate social responsibility activities in the Niger Delta, between the commitment of Chevron Nigeria Limited (CNL) to CSR and its corporate social responsibility activities in the Niger Delta and between the poor leadership and developmental environment created by the Nigerian state and the corporate social responsibility activities of Chevron Nigeria Limited (CNL) in the Niger Delta.

Conclusion

The importance of corporate social responsibility in both developing and developed societies cannot be over-emphasized. This is because of the utilitarian value of CSR culture and practice in the compensation of the environment and the development of society. Central to the success of corporate social responsibility in Nigeria's Niger Delta is a favourable

predisposition and genuine commitment by corporate actors in a fashion that goes beyond legal and fiscal frameworks as well as the creation of a genial leadership and development climate by the Nigerian state. The CSR challenge in Nigeria is a great one considering the fact that there exists a general climate of poor attitude to CSR concerns. This obvious reality explains the urgency for a climate change engineered by socially responsible government policy direction and action programmes that are not only discernable by private and voluntary actors, but will also engender cooperation and partnership among stakeholders that will culminate in the creation and application of integrated and innovative sustainable development solutions. To develop, embed and promote CSR in Nigeria, particularly its Niger Delta Region, the multi-layered levels of government and private sector organizations must believe in and identify with corporate social responsibility as a long-term investment that has a significant role to play in addressing pressing developmental issues in Nigeria.

Recommendations

To ensure the success and workability of corporate social responsibility in Nigeria, particularly in its Niger Delta region, there is the need for the recognition and acceptance by government, private sector and non-governmental organizations of CSR culture and practice as a going concern. In this direction, corporate social responsibility policies and

public actions that will encourage and promote socially and environmentally responsible practices are highly desirable. This focus will require a recognition and realization that organizational activities have a wider social, economic, environmental and human rights impact on the larger society which makes it necessary to seek to achieve benefits by working in partnership with other social actors. At the heart of the above, is a favourable attitudinal pre-disposition and commitment to CSR by the multi-layered levels of government in Nigeria, their development agencies and private sector organizations, especially the oil conglomerates operating in the Niger Delta environment as well as the creation of a genial leadership and development climate by the Nigerian state.

Besides, there is the urgency for transparency as a key element of CSR that will help organizations to improve their operations, practices and behaviour, knowing that there exist benchmarks against which their social and environmental performance can be measured by themselves or third parties. In fact, corporate social responsibility practices, tools and instruments will be more effective if they are part of deliberate concerted efforts by all stakeholders and if there are transparently verifiable criteria or benchmark.

Finally, CSR should go beyond token support or peripheral or philanthropic involvement to integration of corporate social responsibility into the decision-making process of organizational actors by focusing firmly on high impact actions that will take full account of

opportunities to increase the adoption of corporate social responsibility as part of the normal core practice.

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Analiza podpornih programov v Sloveniji in Avstriji na področju socialnega podjetništva

Marjeta Vaupot

Povzetek

V svojem prispevku opisujem podporne programe za razvoj socialnega podjetništva v Sloveniji in v Avstriji. Predstaviti želim pojem socialnega podjetništva ter pomen tako podpornih programov in politik na nivoju lokalnih in regionalnih ter nacionalnih akterjev, ki s svojim delovanjem lahko bistveno pripomorejo k uspešnemu razvoju socialnega podjetništva v Sloveniji. Kot primerljivo državo sem izpostavila Avstrijo, ki s svojim večletnim uspešnim ter sistematičnim razvojem močno razvija sektor socialnega podjetništva.

Ključne besede: socialno podjetništvo, podporni programi politik.

Summary

In my article I describe development of social entrepreneurship in Slovenia and Austria. I will describe a term of socialn entrepreneurship and issue of programs and polices in terms to support development of

social entrepreneurship in Slovenia. I choosed Austria as comparative nation, while they are sistematicly developing field of social entrepreneurship, that is build from local initiatives to national directions and policyies..

Key words: social entrepreneurship, support programs for development of social entrepreneurship.

Uvod

Podjetništvo, kot ključni element ekonomije, se v današnjem času kaže v različnih oblikah. Večina držav Evropske unije že uveljavlja tako imenovano socialno podjetništvo, do katerega je Slovenija, kot enakopravna članica Evropske unije tudi opredeljena. Socialno podjetništvo je pomemben element, tako gospodarskega kot tudi socialnega področja, saj povezuje in dopolnjuje obe področji. Ne le, da povezuje obe področji – ustvarja tudi sinergijske učinke. Socialni podjetniki so glavni iniciatorji socialnega podjetništva in jih poleg ekonomskega vidika (uspešnost podjetja) zanima predvsem socialni vidik (ustvarjanje novih delovnih mest in ponovna integracija ranljivih skupin

na trg dela). V Evropski uniji ustvarijo okoli 10 % BDP letno². S svojimi podjetniškimi prijemi skrbijo za to, da se v aktivno vlogo postavijo ljudje, ki so bili nekativni zaradi različnih razlogov. S tem ti pridobijo ponovno vrednost tako na trgu dela kot tudi v doprinosu do države. Za razvoj socialnega podjetništva je potrebno vzpostaviti sistem delovanja oz. oblikovanje ključnih podpornih programov, ki lahko omogočijo strateški razvoj socialnega podjetništva tudi v Sloveniji.

V članku bom proučila podporne programe za razvoj socialnega podjetništva v Avstriji in jih primerjala z podpornimi programi v Sloveniji. Skozi strokovno literaturo želim proučiti in ugotoviti podobnosti in razlike za vzpostavitev sistema socialnega podjetništva v Sloveniji.

V članku bom obravnavala pregled socialne ekonomije v na področju Avstrije in Slovenije, pri čemer gre za strokovnoanalitično delo. V delu je v pretežni meri uporabljen deskriptivni pristop, saj bodo podrobno proučila podporne programe za razvoja socialnega podjetništva. Pri tem bom uporabila teoretične in zakonske podlage ter spoznanja s področja raziskave tako, da se bom naslonila na strokovno literaturo tujih in domačih avtorjev, vire, prispevke in članke ter uporabila praktična znanja, ki sem jih pridobila z večletnim delom na področju socialnega podjetništva.

² V Sloveniji je ta delež 0,7 % BDP (Forum za socialno podjetništvo, Tadej Slapnik generalni predsednik, 2013).

Opredelitev področja in opis problema

Analize in pregled razvoja oblik podjetništva v 21. stoletju kažejo na to, da se tako v svetu kot tudi v Evropski uniji razvijajo nove oblike podjetništva. Ena od teh oblik je socialno podjetništvo, ki se od klasičnega podjetništva razlikuje v tem, da temelji na razvoju socialnega kapitala ter ustvarjalnosti in inovativnosti, ki jih socialni kapital omogoča v največji možni meri. Cilj socialnega podjetništva je, da se dobiček prerazporedi nazaj v podjetje. Glavni cilj socialnega podjetništva se kaže v zasledovanju širših družbenih ciljev. Na razvoj takšnih oblik podjetništva vpliva predvsem visoka stopnja socialnega kapitala, ki ob pomoči različnih finančnih virov in posebnega statusa socialnih podjetij omogoča socialnemu podjetništvu visoko stopnjo ustvarjalnosti in odprtosti na nove proizvode in storitve, ki jih ne more zadovoljiti niti javni sektor kot tudi ne profitni sektor. Razvoj socialnega podjetništva še posebej vpliva na večjo učinkovitost in razvoj tako profitnega kot tudi neprofitnega sektorja.

V svetu in Evropski uniji se socialna podjetja predstavljajo kot podjetja, ki so organizirana v oblikah kot kooperative, zadruge, socialna podjetja, fundacije, vzajemne družbe, društva in združenja. Ta z uvajanjem novih podjetniških znanj, spretnosti in novih tržnih pristopov, postajajo učinkovitejša pri zasledovanju svojih ciljev, ki na nov in edinstven način

omogočajo, da državljani in organizacije med seboj delijo in koordinirajo vire, spretnosti in znanja na način, da takšno podjetje lahko postane konkurenčno. Ta podjetja ugotavljajo, da je produkt socialnega podjetja visoko kakovostna zaposlitev udeležencev in tako izboljšujejo kakovost življenja, razvijajo nove oblike dela, zagotavljajo socialno kohezijo in pomembno prispevajo k lokalnemu in regionalnemu razvoju. Ključ do tega leži v podpornem lokalnem in regionalnem ter nacionalnem okolju, ki predstavlja razvojna partnerstva med javnim in zasebnim sektorjem.

V Evropski uniji so oblike socialnega podjetništva v zadnjih letih sprožile široko razpravo na politični in strokovni ravni v mednarodnih institucijah kot tudi na ravni nacionalnih in regionalnih vlad. Ugotovitve kažejo, da je da imajo takšne oblike podjetij velik pomen na gospodarskem področju. Na področju Slovenije, pa je ta novi trend podjetništva šele na začetku poti in da so njegove možnosti razvoja še v veliki meri neizčrpane, daje poudarek na nujnost prisotnosti podpornih programov za vzpostavitev te oblike podjetništva tudi v slovenskem okolju .

Opredelitev socialnega podjetništva

Austin v Mair et al. (2006, str. 4) navaja, da je socialno podjetništvo inovativna socialno naravnana aktivnost, ki se pojavlja v neprofitnem, profitnem in javnem sektorju. Perrini in Vurro v Mair et al. (2006, str. 4)

navajata, da je socialno podjetništvo inovativen pristop v podjetništvu, ki spreminja tako socialno kot tudi gospodarsko teorijo in prakso. Nadalje definirata socialno podjetništvo kot dinamičen proces, ki ga vodijo in upravljajo posamezniki ali tim (inovativni socialni podjetniki), ki želijo povezati socialno inovativnost s podjetniško miselnostjo z namenom, da bi ustvarili novo socialno dimenzijo na trgu, tako v lokalnem kot tudi v regionalnem okolju. Robinson v Mair et al. (2006, str. 4) predstavlja definicijo socialnega podjetništva kot proces, ki zajema prepoznavanje ključnega specifičnega problema in ključno rešitev tega problema.

Ob vse bolj pogostem pojavljanju pojma socialnega podjetništva v svetu ima opredelitev socialnega podjetništva različna mnenja in opredelitve. Socialno podjetništvo ima svoje korenine v zasledovanju širšega pojma podjetništva. Vsi različni pristopi k socialnemu podjetništvu imajo skupno miselnost v zmanjševanju državnih pomoči, kot iniciativen pristop socialnih podjetnikov, da blažijo socialne probleme in kot etični pristop pri podjetništvu z običajno tržno naravnostjo (Branco et al., 2004, str. 14).

Allex Nicholls (2006, str. 12) v svojem delu *Socialno podjetništvo* (angl. *Social entrepreneurship*) govori o socialnem podjetništvu kot o multidimenzionalnem in dinamičnem konstrukt, ki je prepleten med različnimi sferami: med javnim, privatnim in socialnim sektorjem. Organizacijski mehanizem zaposlenih je praktično nepomemben: socialni podjetniki delujejo v javnem, privatnem in socialnem sektorju. Tako

nekatero organizacije poslujejo z namenom dobička, ki ga uporabijo v neprofitne namene. Takšne organizacije imajo obliko hibridne organizacije, s katero svoji dejavnosti dodajo tudi socialno vrednost. Medtem ko Leadbeater v Nicholls (2006, str. 12) trdi, da je prisotnost podjetništva prepletena preko vseh treh sektorjev v družbi in je prepoznavna v treh okoljih socialnega podjetništva: v javnem sektorju privzema gospodarske spretnosti, v socialnem deluje kot zagotovilo za obrobne skupine in v neprofitnem sektorju ponuja možnost podjetniških pristopov.

Glavna lastnost socialnih podjetij je usmerjenost v socialno področje. Donacije in drugi prispevki so uporabljeni s ciljem, da prispevajo k doseganju širših družbenih ciljev. Večino denarja ustvarijo s prodajo storitev na trgu dela. Dobiček se ne razporeja med lastnike socialnih podjetij. Člani oziroma zaposleni imajo vlogo pri vodenju podjetja. V socialnih podjetjih je predvideno, da predstavljajo takšna podjetja zdrave, finančne in socialne prispevke, ki imajo večjo prednost kot visoki prispevki na finančnem področju in nižji na socialnem področju (Thompson & Dorhety, 2006, str. 362).

Alain Coheur je v intervjuju, kot predsednik Socialne ekonomije Evrope, poudaril, da socialna ekonomija potrebuje pravni okvir za delovanje v vseh državah članic Evropske unije. Trdi namreč, da je potrebno urediti davčno zakonodajo, da bo primernejša za delovanje tovrstnih podjetij,

saj združujejo vse akterje v socialni ekonomiji, kot so klasična podjetja, kooperative, združenja, tudi podjetja in socialna podjetja (Coheur, 2008). Države Evropske unije se pri uvajanju socialnih podjetij v prakso zelo razlikujejo. Izhajajo predvsem iz lokalnih potreb in interesov ter zakonskih podlag, ki so ali v veljavi ali pa jih še pripravljajo. Kljub temu imajo zaposlitvene iniciative, ki jim pomagajo pri prepoznavanju statusa socialnega podjetja (Pave Štefančič, 2005, str. 13).

Stanje in razvoj socialnega podjetništva v Sloveniji

Socialno podjetništvo je pojem, ki mu lahko pripišemo določene značilnosti. Težko pa ga je enoznačno definirati, saj so tudi pravne opredelitve subjektov socialnega podjetništva od države do države različne. Tako lahko govorimo, da gre za organizacije in podjetja, katerih ustanovitelj ni država, ki proizvajajo tržne in netržne proizvode in storitve, vendar so ustanovljene s socialnim (družbenim) ciljem, ki delujejo po demokratičnem principu članov, uporabnikov in zaposlenih ter temeljijo na solidarnosti njenih članov in ne delijo dobička med ustanovitelje, temveč je reinvestiran za potrebe poslovanja ali potrebe skupnosti. Med socialna podjetja tako večinoma prištevamo zadruge, vzajemne družbe, društva, zasebne zavode, invalidska podjetja, druge oblike podobnih organizacij (Predstavitev ASSE, 2008).

Socialno podjetništvo s svojo široko usmeritvijo obsega prav vse posameznike, ki zaradi različnih vzrokov ne zmorejo živeti samostojnega, polnovrednega življenja z dodeljenim statusom ali brez. Upošteva načelo enakovrednosti in enakopravnosti ter omogoča spoštovanje človekovih pravic, pri čemer ni pomemben status posameznika, marveč njegova nemoč, pomanjkanje izkušenj, znanja, sposobnosti za aktivno vključevanje v družbo. V preteklosti so bili številni poizkusi opredeljevanja ciljnih skupin ranljivih posameznikov v želji, da bi glede na posebne potrebe posameznih skupin oblikovali učinkovite programe, s katerimi bi ublažili posledice primarne prizadetosti. Prav to je težko doseči, saj je vsak posameznik celota zase, ki zahteva visoko raven posebej zanj prilagojene obravnave. V teoriji in praksi obstaja pestro izrazoslovje, ki je jasen dokaz prizadevanj po iskanju nestigmatizirane definicije, ki bi ranljivemu posamezniku ponujala nove možnosti in ga ne bi doživljenjsko ukoreninila bolezen, prikrajšanost (npr. invalidnost, socialna izključenost, socialna deprivacija, marginalnost skupine itd.). Med ranljive skupine prebivalstva sodijo vsi tisti posamezniki, ki jim grozijo posledice socialne izključenosti, ker imajo težave na naslednjih področjih, kot so zaposlovanje, družina, socialna mreža, zdravje, osebne kompetence. Kot nadalje navaja Uršič (Dular et al., 2007, str. 11), se socialna ekonomija v svetu in pri nas vključuje v lokalno skupnost na različne načine, kjer poskuša iskati dinamične in inovativne pristope k reševanju brezposelnosti in prispevanju k ekonomskemu razvoju, ki ne temelji na izčrpavanju okolja in delovne sile, ampak na usklajenem in trajnem pristopu.

Primeri podpornih progamov na področju socialnega podjetništva v Sloveniji

Definicija socialnega podjetništva

Socialna ekonomija predstavlja družbeno ekonomsko kategorijo, kjer vrsta najrazličnejših pravnih in fizičnih subjektov ustvarja podporno okolje za (ponovno) vključitev ranljivih skupin prebivalstva v socialno in delovno okolje. Socialno podjetništvo pomeni etičen, strokoven, inovativen in sistemski pristop, ki z različnimi aktivnostmi udejanja cilje socialne ekonomije (Branco, 2004, str. 34).

Osebe, ki potrebujejo vključitev v socialno podjetništvo

- Invalidne osebe
- Osebne z zdravstvenimi težavami in kroničnimi boleznimi
- Odvisniki od alkohola in drog
- Osipniki
- Dolgotrajno brezposelni
- Azilanti, begunci,
- Pripadniki nekaterih etičnih skupin
- Starejši brezposelni

- Prejemniki socialnih podpor
- Ranljive ciljne skupine

Skupine oseb, ki zaradi takšnih ali drugačnih razlogov na kratek ali dolgi rok ne morejo najti zaposlitve v dobičkonosnem sektorju, so potrebne posebne obravnave; ena od njih je možnost vključevanja v področje delovanja socialnega podjetništva (Svetlik et al., 2002, str. 13).

Ciljne skupine v socialnih podjetjih so predvsem ranljive ciljne skupine, ki so vključene na področje socialnega podjetništva z namenom izboljšanja zaposlitvenih možnosti, pridobitev in krepitev sposobnosti, znanj, veščin in spretnosti, ter večjo konkurenčnost ranljivih skupin na trgu dela smo oblikovali model učnih delavnic v socialnih podjetjih tipa B (URL: http://www.mddsz.gov.si/si/delovna_podrocja/trg_dela_in_zaposlovanje/socialno_podjetnistvo/, 2014)

Sodelujoči akterji v socialni ekonomiji

V socialno ekonomijo se vključujejo najrazličnejši akterji iz vseh družbenih struktur. Med najpomembnejše se uvršča na prvem mestu država kot odgovorni sooblikovalec podpornega okolja, zakonodajalec, kot mreža javnih institucij ter v določenih primerih kot delodajalec in investitor. Na drugem mestu je lokalna skupnost, enako pomembna kot država, le na lokalnem nivoju. Pomembne so tudi gospodarske in

negospodarske organizacije kot nosilci nekaterih aktivnosti socialne ekonomije (zaposlovanje, investiranje, razvoj dejavnosti). Poleg teh pa še mreža strokovnih institucij, tako javnih kot zasebnih (zavodi, ustanove ...), upravičenci ugodnosti socialne ekonomije, mreže nevladnih profitnih institucij (društva, fundacije), prostovoljci kot laiki ali strokovnjaki. Strokovnjaki nastopajo kot posamezniki in predstavniki posameznih institucij (Branco, 2005, str. 54).

Vzpostavitev institucionalnega, pravnega okvira in vključevanje socialnega podjetništva

Razvoj socialnega podjetništva zahteva sistemski pristop. Zato moramo v Sloveniji zagotoviti ustrezno osveščenost, vzpostaviti ustrezno klimo, institucionalni in pravni okvir ter vključiti socialno podjetništvo v prevladujoče politike. Vsaka politična raven mora pri tem prevzeti svoje odgovornosti.

Vloga države

Deluje na področju ozaveščanja in pozitivne promocije socialnega podjetništva ter ob podpori klasičnega, profitno naravnane podjetništva posveča vsaj enako pozornost trajnostno naravnani podjetniški kulturi, ki temelji na vključevanju ranljivih skupin, aktiviranju potencialov manj razvitih ruralnih območij, kar dodatno potrjuje tudi z lastnim zgledom, s prenosom vse večjega obsega storitev za prebivalstvo, storitev na področju varstva okolja, kulturne in naravne dediščine na nova podjetja in organizacije, ki se razvijajo na področju socialnega.

Omogoča, da lahko socialna podjetja konkurenčno delujejo z ostalimi podjetji, pri čemer jim daje zaradi njihovega posebnega pomena za trajnostni razvoj posebno mesto pri pridobivanju javnih naročil in spodbud. Vzpostavlja partnerski odnos s predstavnimi organizacijami posameznih področij socialne ekonomije, zaznava in odpravlja ovire ter upošteva posebne in upravičene potrebe socialnih podjetij ter jih vključuje v svoje politike in programe. Zagotavlja primerne finančne

spodbude in kakovostno strokovno/svetovalno pomoč organizacijam in nosilcem iniciativ na tem področju, skrbi za prepoznavanje in prenos dobrih praks. Zagotavlja spodbudni davčni okvir oz. davčne olajšave za klasična podjetja, ki investirajo v socialno podjetje. Zagotavlja dodatne olajšave za podjetja in posameznike, ki donirajo. Sistematično skrbi za razvoj človeških virov na tem področju, s tem da spodbuja razvoj novih programov izobraževanja in usposabljanja, povezanega z razvojem različnih oblik socialnega podjetništva, ter s pomočjo posebnih programov zagotavlja zaposlenim in prostovoljcem, ki delujejo v okviru socialnih podjetij, dostop do različnih oblik usposabljanja in izobraževanja. Spodbuja javno-zasebno partnerstvo za uresničevanje zastavljene strategije, še posebej pri razvoju finančnih institucij in oblik financiranja investicij v okviru socialnih podjetij (npr. razvoj etičnih bank) (Lužar et al., 2005, str. 9).

Brezposelnost kot pojav v družbi pa povzroča stroške tako posameznikom kot tudi državi. Tako na primer govorita Dooley in Prause, da je nujno potrebno, da se v družbi ovrednotijo stroški, ki jih brezposelnost povzroča tako na gospodarskem kot tudi na zdravstvenem področju. Potrebno pa je ovrednotiti tudi stroške, ki jih izguba službe povzroči posamezniku, družini in posledično lokalnemu okolju. Trdita namreč, da so stroški, ki jih povzroči brezposelnost vidni na področja zdravja, kar povzroči povečane storitve na področju zdravstva; visoka stopnja brezposelnosti lahko povzroči demoralizacijo v skupnosti in mogoče celo socialno kontaminacijo (Dooley & Prause, 2005, str. 31–30).

Uvajanje socialnega podjetništva je po mnenju sogovornice v Sloveniji pomembno zlasti zaradi bližajočih se reform. Po eni strani bo kapital dobil svobodno pot, po drugi strani pa bi radi obdržali socialno državo in jo nadgradili v državo blaginje, ta pa ne more nastati, če ljudje v njej niso integrirani. Gre za zasebno pobudo, ki ji daje spodbudo država in kjer morajo imeti podjetniki poleg poslovodskih tudi socialne spretnosti (Mihajlovič, 2005).

Uvajanje socialnega podjetništva in podporni programi

Jenko v Dular et al. (2007, str. 21) omenja, da so ena od zelo razširjenih oblik socialne ekonomije v Sloveniji invalidska podjetja, ki jih je po podatkih za leto 2004 delovalo 156 in je zaposlovalo 13.580 delavcev. Med njimi je bilo 6.348 invalidov. Ta oblika socialne ekonomije/ socialnega podjetja temelji na primarnem poslanstvu invalidskega podjetja, ki je usposabljanje in zaposlovanje invalidov. Naloge, ki so povezane z integracijo oz. reintegracijo invalidov v delovno in življenjsko okolje, so strokovna obravnava invalidov, humanizacija njihovega dela in povečanje kvalitete njihovega življenja. Poleg invalidskih podjetij, kot oblike socialne ekonomije, so se sicer v Sloveniji že začele uveljavljati tudi druge oblike, kot so npr. zaposlitveni centri in drugi, vendar v primerjavi z razvitimi ekonomijami Evropske unije še vedno premalo. Tako kvantitativen kot še bolj kvalitativen razvoj (diverzifikacija) socialne

ekonomije je ena bistvenih priložnosti na področju spodbujanja zaposlovalne reintegracije in spodbujanja enakih možnosti ter socialnega vključevanja, ki jih Slovenija prepoznava tudi v temeljnih razvojnih dokumentih, kot tudi dokumentih, ki se pripravljajo za koriščenje sredstev strukturne politike v naslednji finančni perspektivi 2007–2013, zlasti iz sredstev Evropskega socialnega sklada (v nadaljevanju ESS).

V Sloveniji so se od leta 2011 oblikovali pomembni koraki na področju razvoja podpornih programov za razvoj socialnega podjetništva:

- oblikovan Pravni okvir za delovanje socialnih podjetij postavlja Zakon o socialnem podjetništvu (Uradni list RS, št. 20/2011) v podporo socialnemu podjetništvu.
- sprejet tudi Pravilnik o spremljanju poslovanja socialnih podjetij, katerega priloga je vzorec sklepa, ki ga zahteva 14. člen zakona (sklep ustanoviteljev ali pristojnega organa nepridobitne pravne osebe, da namerava poslovati kot socialno podjetje)
- Sprejeta Uredba o določitvi dejavnosti socialnega podjetništva in Uredba o spremembah in dopolnitvah Uredbe o določitvi dejavnosti socialnega podjetništva.
- Uveden je bil posebni računovodski standard za socialna podjetja – SRS40, ki ga moraj uporabljati vsa socialna podjetja, ne glede na njihovo pravnoorganizacijsko obliko.
- Vlada RS je 22. 9. 2011 ustanovila Svet za socialno podjetništvo, ki je pristojen za oblikovanje politike razvoja socialnega podjetništva v Republiki Sloveniji, in sicer v sodelovanju z

ministrstvi, vladnimi službami, občinami, socialnimi partnerji in organizacijami civilne družbe.

- Na podlagi Zakona o socialnem podjetništvu je Vlada Republike Slovenije 25. 7. 2013 sprejela Strategijo razvoja socialnega podjetništva za obdobje 2013 – 2016, ki zagotavlja načrtovan razvoj socialnega podjetništva v republiki Sloveniji za obdobje štirih let.
- Na podlagi zakona je strategijo pripravil Svet za socialno podjetništvo.
- Izhajajoč iz strateških ciljev strategije je MDDSZ v sodelovanju z ministrstvi, pristojnimi za področja dejavnosti socialnega podjetništva, pripravilo Program ukrepov za izvajanje strategije. Namen Programa ukrepov za izvajanje strategije razvoja socialnega podjetništva za leti 2014-2015 je spodbujanje razvoja socialnega podjetništva. Ocenjena vrednost sredstev za izvajanje aktivnosti, ki so namenjena socialnim podjetjem, je 12,7 milijona evrov.

Nadalje je RS sprejela pomembne pristope na področju merjenja učinkov v socialnih podjetjih, ki ne predstavljajo samo ekonomske donosnosti ampak so usmerjeni na področju merjenja družbenih učinkov, saj je cilj vsakega socialnega podjetja vplivati na spremembe v družbi oziroma dosegati družbene učinke, ki jih je potrebno ustrezno ovrednotiti. Model merjenja učinkov podjetjem prinaša pomoč pri boljši dostopnosti do bančnih finančnih virov s predstavitvijo finančnih koristi ali manjših

rizikov za investitorja. Omogoča tudi možnost nastopa socialnim podjetjem na EU razpisih in spodbuja proces družbenega investiranja bank in zasebnih vlagateljev v projekte z družbenim učinkom.

Socialno podjetništvo se spodbuja tudi skozi aktivnosti Ministrstva za delo, družino, socialne zadeve in enake možnosti spodbuja razvoj socialnega podjetništva tudi prek javnih razpisov, ki se sofinancirajo iz sredstev Evropskega socialnega sklada. Socialna podjetja se lahko tako prijavljajo na razpise ukrepov aktivne politike zaposlovanja, ki so namenjeni povečanju zaposlitvenih možnosti brezposelnih oseb. Aktualni razpisi so objavljeni na spletni strani Zavoda RS za zaposlovanje. Za vsak razpis posebej so v razpisni dokumentaciji natančno opredeljeni pogoji za izvajalce. (URL:http://www.mddsz.gov.si/si/delovna_podrocja/trg_dela_in_zaposlovanje/socialno_podjetnistvo/, 2014)

Javni razpisi iz sredstev Evropskega socialnega sklada

Primeri podpornih progamov na področju socialnega podjetništva v Avstriji

Definicija socialnega podjetništva

Socialno podjetništvo bi lahko bilo definirana s tremi I-ji:

- Identiteta – združuje vse, ki imajo skupen interes in občutek pripadnosti oziroma identitete s socialno ekonomijo kot posebnim ekonomskim področjem.
- Institucije – pokrivajo glavne institucionalne oblike kooperativ, vzajemna in prostovoljna združenja.
- Intencija – (namen) vključuje ekonomske dejavnosti s socialnim in etičnim namenom.

Glavne značilnosti, ki so skupne organizacijam v sektorju, so kombinacija socialnih, etičnih in ekonomskih teženj ter vrednot in koristi za člane oziroma skupnost pred povračilom investicije. Organizacije socialne ekonomije so prej usmerjene v ljudi kot usmerjene v investicije. So neodvisne in samoupravne. Trženje je usmerjeno k ciljem organizacije. Uvodnim definicijam je treba dodati še definicijo podjetniškega združenja, ki postaja v zadnjih letih vse pomembnejša. Strateška združenja neprofitnih organizacij z večjimi družbami, mikro in malimi podjetji, vladnimi agencijami in drugimi neprofitnimi organizacijami,

tvorijo povezavo med tradicionalno profitnim in neprofitnim socialno usmerjenim sektorjem (Branco, 2004, str. 48).

Definicija upravičencev in ciljnih skupin

Socialna ekonomija zajema ekonomske in socialne koristi. Dejavnosti socialne ekonomije se razlikujejo od širše tržne ekonomije na različne načine, saj so mnoge dejavnosti usmerjene k skupinam ljudi z oviranostmi, nerazvitim območjem in skupnostim. Uspešnost socialne ekonomije vodi k trajnostnemu razvoju finančnih in človeških virov skupnosti in ji omogoča, da prispeva k izboljšanju lastne prihodnosti. Z usmerjenostjo k ljudem, ki ne zmorejo delati v profitnem sektorju, socialna ekonomija razširja trg dela; z usposabljanjem in pripravo na delo omogoča vključevanje na trg dela ljudem, ki brez podpore in pomoči tega ne bi zmogli. Socialna ekonomija lahko računa na podporo prostovoljcev, ki je tržna ekonomija nima.

Socialna ekonomija je lahko pomemben zagovornik nerazvitih območij ter skupnosti in je most, preko katerega jih dosežejo sredstva javnega sektorja. Na kratko, socialna ekonomija lahko deluje na področjih, kjer tržni sektor ne uspeva in obenem omogoča številne ekonomske

ugodnosti nerazvitim območjem, skupnostim in skupinam. Pozitivni vplivi socialne ekonomije imajo prednost pred ekonomskimi koristmi, socialna ekonomija v bistvu koristi območju in regiji tako na ekonomskem, socialnem kot političnem področju. Na ekonomskem področju je zaradi lastne aktivnosti in večje povezanosti trga dela s podpiranjem rasti podjetjih, njihovih produktov in zaposlovanja z zagotavljanjem dodatnih ljudi z izkušnjami. Na socialnem področju z vključevanjem oseb z oviranostmi na trg dela, napredovanjem v karieri in s povečanjem zaposlovanja, izboljšanjem prihodkov in dvigom ravni zdravja na manj razvitih območjih. Na političnem pa z zagotavljanjem bolj enakopravne in stabilne družbe. Koristi socialne ekonomije so pred ekonomskimi cilji, četudi so te koristi v glavnem razporejene na območja in osebe, ki jih tržna ekonomija ne doseže (Branco, 2005, str. 48).

Avstrijska zakonodaja določa tri glavne okvirje za socialna podjetja.

- Različni tipi organizacij: združenja, kooperative, fundacije, podjetja.
- Davčne olajšave so odvisne od ciljev in dejavnosti organizacij: davčne oprostitve in olajšave, naklonjen sistem DDV.
- Državne finančne podpore socialnim podjetjem in njihovim članom zagotavljajo različni zakoni na državni in deželni ravni, npr: storitve za brezposelne (državni zakon), storitve za invalide (deželni zakon).

Poleg glavnih navedenih zakonskih regulativ imajo neprofitne organizacije različne prednosti v preostali zakonodaji. V osnovi davčne ugodnosti niso odvisne od organizacijske oblike (Branco, 2005, str. 48).

Sodelujoči akterji v socialni ekonomiji

Tretji sektor je v Avstriji zelo raznovrsten. Poleg velikega števila mednarodnih organizacij pokriva številne lokalne iniciative, npr. podporo brezdomcem, invalidom in brezposelnim. Poleg organizacij, ki opravljajo socialne storitve, so v sektor socialne ekonomije vključene tudi okoljevarstvene organizacije, organizacije za človekove pravice, športna združenja ipd. Iz evalvacije tretjega sektorja v Avstriji je razvidno, da obstaja okrog 100.000 organizacij, večinoma neprofitnih združenj z okoli 200.000 zaposlenimi in okoli 900.000 prostovoljci.

S področji storitev, podpore in svetovanj različnim vrstam oseb z oviranostmi, npr. brezposelnim, starejšim, psihiatričnim in duševnim bolnikom, priseljencem, brezdomcem itd., se ukvarjajo v glavnem neprofitna združenja. V zgodnjih 90-ih letih je postala nova organizacijska oblika neprofitne pomembna za socialna podjetja. Najpomembnejši javni akterji v socialni ekonomiji so ministrstvo za socialne zadeve (državno in deželno), ministrstvo za gospodarstvo in delo, javni servis za zaposlovanje (državni, deželni in regionalni), občine. Socialne partnerske organizacije so vključene v proces načrtovanja

politike trga dela (zaposlovanja) na deželni in regionalni ravni (Branco, 2005, str. 49).

Podporno okolje v socialni ekonomiji

Pri javnih sredstvih je pomembno ločiti med subvencioniranimi in javnimi naročili. Trajanje naročila del je določeno na osnovi zakonske regulative in lahko traja več kot eno leto. Na nekaterih področjih socialna podjetja konkurirajo s tržno usmerjenimi podjetji, npr. pri institucionalnem varstvu starejših.

Primer Neue Arbeit – Celovec

V okviru socialnega podjetništva so v Avstriji razvili tri modele zaposlovanja, ki se financirajo s pomočjo Evropskega socialnega sklada (ESS) (Duller, 2005, str. 2). Ti modeli so: nedobičkonosni zaposlitveni projekti, ki jih financira Zavod za zaposlovanje. Drugi model je socialno podjetje, ki je naravnano dolgoročno, in tretji model predstavlja zaposlitveni model Neue Arbeit.

Neue Arbeit je pilotni zaposlitveni model, ki vključuje socialni pristop z ekonomsko učinkovitostjo. Ustvarja zaposlitve oziroma delovna mesta za dolgoročno brezposelne osebe. Odpira nove priložnosti in možnosti za

pomembno in vredno življenje. Dela za javno dobro. Neue Arbeit se je dokazal kot profesionalen in zanesljiv partner v trgovini in industriji. Je neprofitno podjetje (neprofitni d. o. o.), ustanovljeno leta 1995 z glavnim sedežem v Šentvidu na Glini in z dvema izpostavamama v Celovcu in Feldkirshnu. Neue Arbeit je inovativen model in predstavlja zaposlitven center za brezposelne osebe (Predstavitev podjetja Neue Arbeit, 2008). Njegov namen je zaposlitev in prekvalifikacija dolgotrajno brezposelnih oseb ter vključitev le-teh na delovni trg. Cilj tega modela je dvigniti raven delovnih spretnosti brezposelnih oseb in jih približati potencialnim delodajalcem. Aktivnosti se izvajajo s posredovanjem delovnih praks. Pri tem vzpodbujajo lastno iniciativo zaposlenih, nudijo pa jim tudi pedagoško podporo in svetovanje. Tovrstno zaposlovanje je izredno prilagodljivo za vse potrebe in spremembe trga dela (Markt, 2005, str. 1–3).

Socialna integracija udeležencev poteka skozi učinkovite priprave težje zaposljivih oseb na novo zaposlitev. V programu usposabljanja brezposelne osebe usposobijo za učinkovito vključevanje v delo. Predvsem si pridobijo 'manjkajoče' socialne spretnosti, veščine, izboljšajo delovne navade ter pridobijo manjkajoča znanja za iskanje zaposlitve. Preizkušajo se v konkretnem delu in pri vseh aktivnostih tesno sodelujejo z mentorji (Interno gradivo Neue Arbeit, 2006).

Neue Arbeit je vpleten v aktivni pretok informacij med različnimi akterji na trgu dela in s tem udeležencem programa omogoča učinkovito pomoč

pri iskanju zaposlitve, zaposlitvenih niš. Pri tem spodbuja nastajanje novih možnosti za različne oblike zaposlitev. Ciljne skupine so dolgotrajno brezposelni, invalidi, brezposelni z zaposlitveno oviranostjo, brezposelni z upadom delovnih sposobnosti, mlajši brezposelni – osipniki in povratniki (Interno gradivo Neue Arbeit, 2006).

Financiranje zaposlitvenega modela Neue Arbeit predstavlja za naše razmere novost. Glavni financerji zaposlitvenega modela so Zavod za zaposlovanje Koroška (Arbeitsmarktservice Karnten). Evropski socialni sklad (Europaischer Socialfonds), Deželna vlada Koroška (Land Karnten), Center za socialno delo Koroška (Bundessocialamt Karnten), Občini Šentvid na Glini (Gemeinde St. Veit) in Feldkirchen ter Magistrat Celovec. Posebnost tega socialnega podjetja je ta, da so ustanovitelji skupnega podjetja Zavod za zaposlovanje Koroška, Center za socialno delo Koroška, Občina St. Veit in dve fizični osebi. V tem primeru direktorici enot v Celovcu in St. Veitu. Kot sta povedali Marktlova in Dullerjeva, gre tukaj predvsem za skupni interes vseh akterjev k zmanjšanju brezposelnosti na avstrijskem Koroškem. V zaključnem poročilu za leto 2007 je podano, da so v tem letu usposobili 402 brezposelni osebi. Od tega je bila uspešnost (usposobiti se za določeno delo in najti zaposlitev v roku treh mesecev do enega leta) 95-odstotna. Kot zanimivost v intervjuju omenjata, da je zaposljivost teh udeležencev po preteku 5 let še vedno 40 odstotkov. Kar pomeni, da ima po zaključenem programu še vedno 40 odstotkov ljudi stalno službo (Letno poročilo Neue Arbeit za leto 2009).

Sklep

Primer socialnega podjetništva predstavlja dober primer razvoja socialnega podjetništva, saj ima Avstrija dolgotrajne izkušnje pri razvoju le tega. Socialno podjetništvo je v Avstriji opredeljeno kot organizacij, ki ima skupen interes in občutek pripadnosti s socialno ekonomijo oziroma posebnim ekonomskim področjem ter vključujejo ekonomske dejavnosti s socialnim in etičnim namenom. V socialna podjetja so vključeni posamezniki, ki ne zmorejo delati v profitnem sektorju in iz tega razloga je socialna ekonomija razširila trga dela z usposabljanjem in pripravo na delo. S tem omogoča vključevanje na trg dela ljudem, ki brez podpore in pomoči, tega ne bi zmogli. Ena izmed zgodb o uspehu v socialni ekonomiji je Neue Arbeit iz Celovca. Njihov primer je zanimiv s področja usklajenosti in povezanosti vseh akterjev na trgu dela, kot so Zavod za zavod za zaposlovanje Koroška, Center za socialno delo Koroška, Občini Šentvid na Glini in Feldkirchen, Magistrat Celovec ter Deželna vlada Koroška ter glavni akterki – direktorici podjetja, ki sta hkrati tudi soustanoviteljici. Njihov uspeh je 95-odstoten. K uspešnemu poslovanju socialnega podjetja pa prispeva velik delež tudi davčna zakonodaja ter državne finančne podpore socialnim podjetjem.

V proučevani literaturi sem zasledila, da je Slovenija v zadnjih treh letih naredila pomembne korake na področju razvoja socialnega podjetništva in vzpostavila skupno definicijo socialnega podjetja. V Sloveniji imamo

okoli 20.000 organizacij, ki imajo posamezne elemente socialnega podjetništva, invalidska podjetja in zaposlitveni centri, ki skupno zaposlujejo okoli 13.000 ljudi in okoli 7 socialnih podjetij³. Za uvajanje socialnega podjetništva obstaja še precej ovir in pomanjkljivosti. V Sloveniji lahko tako govorimo le o primerih dobre prakse s strani invalidskih podjetij oziroma zaposlitvenih centrov, nekaj socialnih podjetij deluje ob pomoči javnih razpisov v letu 2012, ki pa v letu 2015 potečejo in nadaljnje delovanje socialnih podjetij postavlja pod vprašaj. Področje podpornih programov za razvoj socialnega podjetništva v Sloveniji se razvija. Na to kažejo sprejeti zakon o Socialnem podjetništvu, sprejet Pravilnik o spremljanju poslovanja socialnih podjetij, sprejeta Uredba o določitvi dejavnosti socialnega podjetništva in Uredba o spremembah in dopolnitvah Uredbe o določitvi dejavnosti socialnega podjetništva, uveljavitev računovodskih standardov SRS40, ter oblikovanje sveta za socialno podjetništvo, kot tudi sprejetje strategije razvoja socialnega podjetništva 2013 – 2016, kot tudi program ukrepov za izvajanje strategije razvoja socialnega podjetništva 2014-2015. Dosedanje prakse socialnih podjetij (intervju z 4 socialnimi podjetji), kažejo na to, da se kaže tudi dobro sodelovanje akterjev na trgu dela, kot so Zavod za zaposlovanje, društev in MDDSZ.

Pregledala sem politiko zaposlovanja, pravno podlago in obstoječe podporne mehanizme. Skozi vspretni pregled podpornih programov se ovire pri razvoju socialnega podjetništva v Sloveniji, glede na Avstrijo,

³ Podatek pridobljen s strani MDDSZ (januar 2014).

kažejo predvsem na področju oblikovanja primernih davčnih spodbud in vključevanja različnih pravnih podlag na področje socialnega podjetništva (ZOD, zakon o zaposlovanju, zakon o zaposlitveni rehabilitaciji in zaposlovanju invalidov, zakon o invalidskem zavarovanju, davčna zakonodaja ...). Le ti izkazujejo usklajenost pri uveljavljanju teh spodbud in pravic. Na področju Slovenije se kažejo možnosti za razvoj socialnega podjetništva pri prenosu dobrih praks na področju uvajanja različnih modelov socialnih podjetij, ki lahko s svojim delovanjem ob pomoči javne politike (lokalne, regionalne in nacionalne) pomembno vplivajo na opolnomočenje ranljivih ciljnih skupin, na ustvarjanje novih delovnih mest in na zmanjševanje stopnje brezposelnosti v okolju. Da bi dosegli te cilje, je pomembna v Sloveniji tudi opredelitev neprofitnosti podjetij (tako socialnih podjetij, kot tudi drugih organizacij). Neprofitne organizacije delujejo v Avstriji na področju zakona o društvih, ki organizacijam omogoča različne vrste davčnih olajšav, kot tudi pridobivanja javnih naročil. Tovrstna podjetja imajo prednost na področju malih javnih naročil, saj zakon opredeljuje, da imajo neprofitne organizacije zaradi ciljnih skupin težji dostop do opravljanja storitev na konkurenčnih trgih.

Slovenija, kot članica Evropske unije, na področju socialnega podjetništva dela šele prve korake. Ključne možnosti za nadaljnji razvoj so razširitev ciljnih skupin, prilagoditev usposabljanj in nove storitve. Glede na to, da je razvoj socialnega podjetništva zapisan tudi v temeljnih razvojnih dokumentih in dokumentih, ki se pripravljajo za

koriščenje sredstev evropskih strukturnih skladov, menim, da so možnosti za razvoj in umestitev socialnega podjetništva v Sloveniji ugodne. Socialno podjetništvo predstavlja tudi ključni element pri reševanju problema brezposelnosti in pri blaženju posledic gospodarske krize v Sloveniji.

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Merging economic and political elite: slovenian interlocks

Lea Prijon

Abstract

Interlocking directorates were established, among other reasons, for facilitating the flow of information within companies, which inevitably stimulated promotion of the upper-class cohesion, represented by the economic elite. Nowadays, interlocking directorates have different roles among countries and companies. In general, they act as informal economic associations, which can represent a problem in countries with a communist (socialist) tradition, if these bases were not uprooted and where democracy and market oriented economy are still not fully established as dominant systems. The latter represents a specific problem in Slovenia, since transition is still an ongoing process and socialist elements and sentiments are still present. In the paper we examine formation and performance of interlocking directorates in Slovenia. The focus is on Slovenian (para) state companies, where interlocking directorates act as economico-political structures, what we call "economico-political national interlocking directorates". These

formations work on the basis of previous socialist system, thus policy (politics) still influences or, in some cases, even prevails over economy.

Key words: Slovenia, socialism, transition, interlocking directorates, (para) state companies

Introduction

Today many believe that elite groups are governing the states and the world. One of the reasons why elite groups are so powerful is their tendency towards association and affiliation. Despite constant conflicts among elite fractions, while competing for resources (money, power, information, etc.), they also cooperate whenever it befits them. Merging in networks facilitates them the exercise of power and increases the influence over the rest of society and its subsystems (economy, politics, culture). The article analyses elite's cooperation within the so-called interlocking directorates, with a special focus on principles of their formation and performance in Slovenia.

Interlocking directorates (hereinafter *interlocks*) were originally formed for facilitating the flow of information and were business oriented. But nowadays, interlocking directorates act as informal economic associations, which in many cases act as promoters of upper class and

political cohesion among its members. The latter represents a problem in Slovenia, since they are formed as economic and political associations and act as a power elite. This occurrence, which is a frequent phenomena in Slovenian (para) state owned companies would not be an issue, if economic performance of the latter would not be lead by political decisions. The core issue of the article is the functioning of Slovenian interlocks due to their strong dependency on political decisions. This is rooted in the socialist principle of state-led plan economy. Interlocks in (para) state companies were based on previous politico-economic relations, where economy was dominated by political decision-making. The latter is a basis for our attempt to understand the "modern" Slovenian interlocks as *economico-political national interlocking directorates*. This will be the point, which we will try to discuss in the article, while analysing the role of Slovenian crucial economic and political actors (elite) in the formation and performance of national interlocks.

Since crucial political actors can influence (para)state companies, we will analyse the current political arena in Slovenia as well as its past. The aim is also to analyse the potential of Slovenian politics to influence the structure (and consequently also decisions) of board of directors (hereinafter BoD) in these companies. On the other hand, we will also try to assess the importance of political affiliation of BoD's members for their recruitment in strategic positions. Inevitably, we will deal with the power elite as a crucial component of interlocking directorates, which

will be considered as a linkage of economic (steered by money) and political elite (steered by power). The crucial issue in the context of Slovenian *economico-political national interlocking directorates* is the distorted original concept of interlocks. Some experts believe that Slovenia has not gone through all stages of modernization, that its transition was set wrong, that privatisation process was not correct etc., which further influenced today's formation and performance of Slovenian interlocks.

In order to verify and prove the existence of *economico-political national interlocking directorates* in Slovenia, we will analyse some examples of political recruitments in (para) state companies.

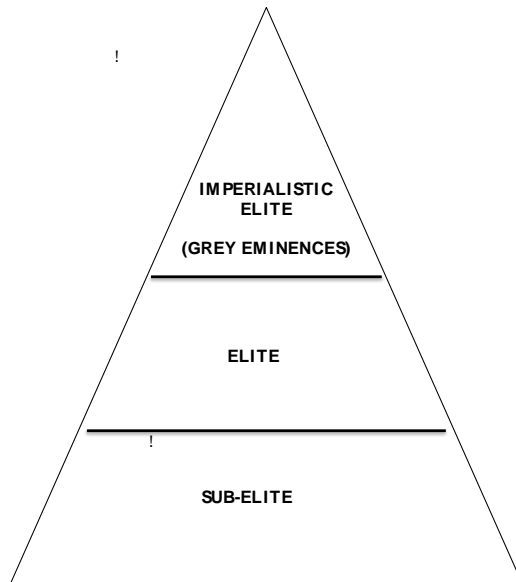
Crucial actors of economic and political system as a (sub)elite

In each society, crucial economic and political actors can significantly affect and define progress' directions. These actors (stakeholders) can stimulate or inhibit society's development, thus, it is quite likely that they will act, at least to some extent, to pursue their own benefits. This idea can be applied and explained through the concept of steering media as a "*general media of interchange*", which are represented by *money* (connected to economic system), *power* (connected to political system), *influence* (connected with society) and *commitment to values*

(connected with the system of preserving the patterns) (see Parsons, 1970). Parsons claims that each steering media is associated to one subsystem and steers its action. Since in the article, we are dealing with political and economic actors, only media of *power* and *money* were being considered.

Crucial economic and political stakeholders in Slovenia hold higher, strategic, positions of the strata and are a part of privileged group of people that empowers them, provides them opportunities and influence (Putnam, 1976), which are drawn from political, economic or cultural spheres. Such a denomination and classification of these actors inevitably lead us to see them as an elite. On the other hand, we cannot speak of elite, but rather of a sub elite, also crucial for society's development, if we follow Mosca's (in Bottomore, 1994: 4 – 5) argument who understands the sub elite, as a precondition for modern elite to rise. For better image, we represent this "structure" in the scheme below.

Scheme 1: The pyramidal elite structure of three layers of elite



Source: Own design

In the article, we understand these actors as an elite in the field of interlocking directorates, which is internally divided into *fractions* and *hierarchically structured*. Each elite's fraction is linked and coordinated by different steering media and controlled through different channel; political elite through elections and economic elite through market competition.

Economic elite is characterized by its ownership of means of production and (non)economic resources (e.g. money, real estates etc.) and it is usually composed of managers or owners of enterprises or corporations. These enterprises and people, which represent and manage them, may become crucial actors in electoral campaigns with financial support of certain political parties or candidates (Haller, 2007). With this, the field of politics suddenly becomes connected with economic system and thus with economic elite. A part of political elite are also members of the parliament, who are formal carriers of the legislative function and as such strongly connected to *power* and capacity to exercise it. A logical deduction in this case shall than be: whenever we speak about political and economic elite, we speak about the power elite.

The power elite was defined by Mills (1965) as a group of people with the largest property of economic resources (economic elite) and power (political elite) in addition to occupying the most important positions in key institutions. The power elite is thus, due to its structure, a prerequisite for power, wealth and social prestige, which enables elite to draw institutional resources of power and money (Mills, 1965). The steer of power, located in centres of power or institutional sectors generates the authority, which is exercised through linkages of economic and political stakeholders. Thus, integration of any form is essential for these stakeholders or elite, as we addressed them, to rule the rest of society and gain personal benefits.

Interlocking directorates as the power elite?

When Szalacha (2011) speaks about the structure of power and claims it can be identified everywhere, she rises a question *where is the locus of decision making?* She sees new networks on national or global scale as a possible resource of power in which elite can join. A group of elite integrates in networks, (in)formal groups, clubs, charitable institutions, corporations, etc. which assures them a certain level of legitimacy in the society. With such a merging, elite form a more or less coherent group, within which, members of elite share the same origin, positions and status in the hierarchy of money, power and prestige. Therefore, elite are the representatives of interests of influential groups, with power and most likely money, therefore they can be addressed as a power elite.

Useem (1984) defined interlocking directorates as a device, which promotes the upper-class cohesion through the board of decision making actors – board of directors. Mizruchi (1996) defines interlocks as communication channels, which allow and facilitate individuals on top positions in the society the access to information between the board of directors within enterprises. Interlocking directorates *”occur when a person affiliated with one organization sits in the board of directors of another organization”* (Mizruchi, 1996) and they indirectly stimulate the formation of business elite, which is, according to Useem (1984), the most cohesive part of any network. Business elite is a part of the *inner*

circle, which is equivalent to the economic elite. The phenomenon of inner circle (economic elite) facilitates incorporate ties and organizational potentials, it allows the excess of narrow, local interests of companies, facilitates the creation and implementation of a more integrated vision of the broad etc. In the context of interlocks, beside being the crucial section for economic component (elite), Useem (1984) speaks also of "power", while claiming, interlocks being the basis for the emergence of elite's power. Thus, the political component is taken into account, since power is a steering media for political system.

There are many reasons for interlocks to occur but the crucial one is linked to investments and refers to company's credibility. According to Domhoff (2006) their original purpose was not to facilitate corruption or abuse of power. They were firstly detected in England in 1970 in textile industry, where certain individuals appeared as co-owners of different firms over the same time. In his explicit and implicit studies of interlocks in the 70s and late 80s, Mizruchi found that in large corporations they meant an indicative cohesion within the capitalist class and allowed consolidation of business in efficient, dominant or political actors. They facilitate political cohesion among corporations (see Mizruchi, 1992). Nevertheless, an agreement whether interlocking directorates act as promoters of political interests in corporations or not, has not been achieved yet. Mizruchi's arguments go in direction of confirming that interlocking directorates were economic and political associations in the past as they are in the present.

The same lack of agreement can be found among opinions about positive/negative influence of interlocking directorates in economic sphere. As already stated interlocks are formed for facilitating the flow of information, they contribute to company's credibility, facilitate monitoring etc. Drago (et al., 2008) while analysing Italian interlocks found that they enabled and facilitated (informal) collusion and communication between directors by creating conditions for controlling consumers. The Italian antitrust authority noted that shareholders mostly gather in interlocking directorates in order to establish the coordination between enterprises for the purpose of expropriation of small shareholders (AGCM, 2010), which is a kind of agreement for facilitating private benefits for further control (see Barucci, 2006). The *Treaty on the Functioning of European Union* (TFUE, 2008) in 101. article bans gathering of independent companies or corporations for collusion to interference competition (see Whish, 2009). Also the *US Denate Pujo Committee* notes that collusion limits competition, what led in adoption of the *Clayton Antitrust Act* in 1914, which followed the previous *Sherman Antitrust Act* from 1890 and specifically prohibited collusion and formation of interlocking directorates (see *The Clayton Antitrust Act, 1914*).

Since interlocking directorates (board of directors) are formed as the top hierarchy of enterprises and are represented by economic elite (owners or managers of capital), which has the monopoly over strategic positions and money, and political elite (carriers of legislative functions), which has the monopoly over power, we can claim that members of these

boards represent the power elite (the alliance between economic and politics). Their mutual cooperation provides possibilities of influencing the society in economic or political way. Mills (1965) claims that in every society we can find an ever-increasing interlocking of economic, military, and political structures while one structure influences the other (e.i. government intervenes in the corporate economy, and corporate economy intervenes in the governmental processes). This, so-called "*triangle of power*" represents the core and the source of interlocking directorates.

The aim of the corporate governance in the US is to avoid and mitigate conflict of interest between dispersed shareowners, without significant decision-making power, on one hand, and controlling managers, with power to influence enterprise's business performance, on the other hand. This process is quite different when we analyze the same phenomenon in the continental Europe, where the controlling shareholder exercises power (and thus control) in an enterprise without owning a larger (majority) share of the cash flow rights through pyramidal ownership, shareholder agreements, and dual classes of shares (see La Porta et al. in Prašnikar et al., 2011).

This problem is specifically relevant for countries, which were (and still are) experiencing transition from 1989 till nowadays. These societies are particularly "vulnerable" and at constant risk of management degenerating, particularly in state and para state enterprises. Therefore boards of directors - interlocking directorates in (para) state enterprises

require special control. But, as Prašnikar (et al., 2011) note *"/.../ little is known about the effectiveness of control mechanisms for those firms that operated in transition environment and/or has passed ownership transformation"*. In what follows we will analyze the case of Slovenian interlocking directorates in order to highlight and give a picture of the formation and performance of Slovenian interlocks.

Slovenian interlocks: case study

Before the analysis of Slovenian interlocking directorates and facts related to the topic, general data on Slovenia is necessary. Slovenia has started its transition in 1989/1990, and it is still an ongoing process. With transition, restructuring of economic and political systems began. On the economic field a change from centrally planned to market oriented economy occur, while the political system changed from socialism to democratic system with parliamentary system of governance (see Pinterič, 2011a). Such societies, where administrative resources are a basis of political power and an alternative to economic means, are characterized by little or no private ownership of production assets. This enabled the ruling party's leaders (the state) to control the economy (Wittfogell in Bottomore, 1994), consequently an effective cooperation could not be applied (Coombes, 2001).

Such a political regime and conditions enabled political officials (party leaders etc.) to uncontrolled (ab)use of power and positions (influences, connections) within government institutions. Through these leverages they controlled or even influenced the elections, which can be addressed as *corruption*. Therefore, ideas and realisation of concepts such as new public management (see Pinterič, 2010; 2011b), good governance (see Klimovsky, 2010), transparency, consolidated democracy, free market economy etc. could not developed as fast and in the same extend as in the West (see Tomšič, 2002; 2008). With the beginning of transition, communist (socialist) systems collapsed and a new space, "*institutional vacuum*" as defined by Lijphart and Waisman (1996) or "*creative chaos*" as defined by Ágh (1994) emerged. Such conditions represented a possibility for new beginning in these societies, which were differently "exploited" by different transition countries. The crucial actors in the process of transition were and still are economic and political representatives of the highest strata, which occupy crucial, strategic positions and can be thus called an elite.

Sztompka (1999) speaks of "*civilisational incompetence*" as an indispensable basis for full exercise and consolidation of democracy, market economy and open circulation of ideas. Specific factors, like the absence of market-oriented work ethics and democratic political culture, which are the consequence of socialist and pre-socialist societies (see Sztompka, 1993) hindered the full modernization of Slovenian society. Consequently, elites as were formed and established in Western

societies did not emerge in socialist (communist) societies. Based on the *neoelite paradigm*, as defined by Higley and Pakulski (2000) elite should be observed through the crisis of regimes, since they represent social groups formed from different fractions in each country. Thus, individuals in strategic economic and political positions can be defined as an elite, and will be discussed as such further on. In Western societies, elite are seen as the carriers of the progress and as a generator of systemic transformations. One of the stimulative point for collapse of socialism and for transition to begin, were tensions and conflicts between the regime and opposition's elite (Huntington, 1993 and Gill, 2000).

Before the transition, Slovenia had the socialist system with a centrally planned economy where political system dominated the economic one. Such system enabled the formation and survival of "*red directors*", who succeeded in the domestic market, with collective actions of economic policy. In addition they merged with politics and political representatives, the crucial actors during the socialist period (who maintained their political positions also during transition). The existence of such a system generated high levels of reproduction of socialist business elite, which were able to maintain (or regain) their economic positions from the previous system. Szeleny (1996) defined this situation as "*managerial capitalism*", which allowed the managerial layer controlling economy's levers, due to the absence of ownership structure.

As we are focusing on the case of Slovenian interlocks, we will analyse the formation and performance of the latter. The starting point of our analysis is linked with the previous socialist system, which left some elements rooted also in nowadays' Slovenian society. These, previously mentioned elements (the absence of market-oriented work ethics and democratic political culture) have a great impact on every sub system (politics, economy, culture) and its actions, consequently also on the formation and performance of Slovenian interlocks. The latter are formed and perform as "*authoritarian structures*" for benefits of BoD's members and political leaders, who have enabled their positions. Based on this arguments, one can say that interlocking directorates are also a linkage between economic and political elite and a channel to promote political interests and cohesion. Within the corporate world strong, elaborated and influential networks of interlocking directorships can be found, hence interlocking directorates mean a solid feature and a crucial phenomenon of a business life and a key feature for being analyzed when the business involves politics (Mills, 1965). We will analyse Slovenian interlocks in the context of economic and political alliance for promoting mutual interests, which result in political recruitment and clientelism. We address them as *economico-political national interlocking directorates*. In this way, they are equivalent to the power elite. Thus, the analysis of Slovenian interlocks begins with the general presumption, stemming from Kramberger (2002), that whenever analysing the concept of power, the observation object is always *the power of a leading group of individuals*.

Slovenian economic system essentially depends on developments in political arena, which is specifically evident on national level that is in cases of (para) state owned companies. In the whole history of Slovenia as an independent state (from 1991) there was a coalition of leftist parties, which predominantly governed Slovenia. To illustrate this situation, in the table below (TABLE 1) we represent the ratio of Slovenian governments since its independence till nowadays, which is a relevant approach when analysing the structure and the logic of Slovenian interlocks, the so-called *economico-political national interlocking directorates*. The aim of such analyse is to prove that Slovenian politics leads the economy since it is strongly related to developments in political arena.

Table 1: Slovenian governments between 1990 and 2015

GOVERNMENT	PERIOD	PRIME MINISTER (PM)	PARTY AND POLITICAL ORIENTATION	PERFORMANCE OF FUNCTION AS A PM
1. Government RS	16.5.1990 – 14.5.1992	Lojze Peterle	DEMOS (right)	2 years
2. Government RS	14.5.1992 – 25.1.1993	Janez Drnovšek	LDS (left)	1 year
3. Government RS	25.1.1993 – 27.2.1997	Janez Drnovšek	LDS (left)	4 years

4. Government RS	27.2.1997 – 7.6.2000	Janez Drnovšek	LDS (left)	3 years
5. Government RS	7.6.2000 – 30.11.2000	Andrej Bajuk	SLS+SKD (right)	6 months
6. Government RS	30.11.2000 – 19.12.2002	Janez Drnovšek	LDS (left)	2 years ⁴
7. Government RS	19.12.2002 – 3.12.2004	Anton Rop	LDS (left)	2 years
8. Government RS	3.12.2004 – 21.11.2008	Janes Janša	SDS (right)	4 years
9. Government RS	21.11.2008 – 10.2.2012	Borut Pahor	SD (left)	3 years ⁵ (unfinished mandate/vote of no confidence)
10. Government RS	10.2.2012 – 20.3.2013	Janes Janša	SDS (right)	1 year (unfinished mandate/vote of no confidence)
11. Government RS	20.3.2013 – 5.5.2014	Alenka Bratušek	ZAB (left)	1 year (unfinished mandate/resignati on)
12. Government RS	18.9.2014 – present	Miro Cerar	SMC (centre- left)	present

Source: Own table

⁴ When Janez Drnovšek was elected president of Slovenia, Anotn Rop become Prime minister.

⁵ Borut Pahor prematurely ended the function of Prime minister after the motion. On December 4th, 2011 first early elections to the National Assembly of the Republic of Slovenia, were performed.

The specific Slovenian practice of politico-economic recruitment can be observed in two crucial moments when "summing up" the governance ratio, there was almost a 17 years (with the current "central-left" government) governance of left option and some more than 7 years of right option. The latter is particularly important, since changes in Board of directors (BoD) in some (para) state companies was observed, with every government's mandate. One of Slovenian national newspaper (Dnevnik.si, 2012) stated that in the media such changes were also called "*recruitment's tsunami*", which washed away the majority of old BoD's from (para) state companies. In one of the interviews Rus (2012) stated that in Slovenia, political affiliation is still a crucial criteria for nomination in strategic positions, which is not a problem per se' as long as (political) nominations (recruitments) on top positions occur for company's benefits. "Unfortunately", he states, these recruitments depend on particular interests more than on managerial capability and economic performance of selected candidates.

Before analyzing the cases of Slovenian interlocking directorates in (para) state companies in terms of their political connections and recruitment, some more details are needed about the privatization process and managerial acquisitions are needed. Acquisitions of national enterprises has become an increasing issue from the beginning of transition till nowadays. Slovenian privatization was disputable, since after 1995 non-transparent managerial acquisitions took place, first in the case of authorized investment companies and later in the case of

state's corporations. The Law on Acquisition, adopted on July 1 in 1997 in Slovenian National Assembly (Official gazette RS no. 47/1997) vaguely defined the process of acquisition and thus enabled circumventing the rule of law. The Law did not regulate the lack of transparency in managerial ownership concentration associated with insidering in companies, which were not included in stock markets. The Law also facilitated managers and members of board of directors taking the advantage of their positions and exploit information to acquire enterprise's ownership with unfair market price. Slovenska Demokratska Stranka – SDS (Slovenian Democratic Party), the biggest party in the current Slovenian coalition – government) defined such acquisitions as controversial based mostly on borrowing, without any economic logic, due to depletion of enterprises etc. During this process managers have posed shares of the target company not even in their possession to cover loans. The loans were paid from current cash flow of these companies instead of investing this capital in in development, human resources and reinvestment etc. (SDS, 2007). Therefore with the implementation of changes in The Law of Acquisition in 2007 the acquisition threshold was rose from 1/4 of the voting rights to 1/3 and reporting obligation to Slovenian Securities Market Agency was introduced. With such changes the government wanted to revive the capital market and the newly established acquisition threshold became comparable with the arrangements in other EU Member States, consistent with the qualifying shares of information about the acquisition of securities (see Ministry of Economic Development and

Technology, 2012 and Act on the Amendment of the Law on Acquisition, 2008).

In what follows we give some examples of economico-political connections (recruitments) in some Slovenian (para) state companies to highlight the afore mentioned cooperation of economic and political sphere (economic and political elite). In cases of (para) state companies we analysed changes in structure of Board of directors (BoDs) politically affiliated to left or right political option.

Cases of economico-political national interlocking directorates

The case of Mercator d.d. (Slovenian supermarket) when Zoran Janković (one of the founders of the Forum 21 – association of left wing politicians and economists, the Mayor of Ljubljana – from 2006 to 2011 and from 2012 till nowadays, President of Pozitivna Slovenija – left party and the candidate for Prime minister in 2011) has been appointed as the President of BoD in 1997 under the Presidency of Janez Drnovšek (LDS - left party) and dismissed in 2005 (under the Government of Janez Janša (SDS – right party) (Korsika, 2011). Even though, there are no formal evidences that Janović has been politically appointed, after one of the parliamentary sessions in 2005, Janez Janša, the current Premier of Slovenia (SDS – right party) claims that Janković has been politically appointed as the President of BoD in Mercator (STA, 2005). The only evidence, which could be found is the video caught in Slovenian

Chamber of Commerce in 2002 where, without knowing of being recorded, Tone Rop⁶ accuses Jankovič of being politically appointed by him. Jankovič later explained that Rop was speaking about his appointment in the BoD of Mercator. Jankovič was appointed by Slovenska odškodninska družba (Slovenian Restitution Fund), which board of directors was led by Rop. Peter Rigl (now deceased, a member of LDS – left party) was supposed to lobby for Jankovič to become the president of Mercator's BoD, (Pirc, 2005). In 2006 (under the right party) Žiga Debeljak was appointed as the President of BoD in Mercator, where he stayed until May 2012. Also in this case there is no formal evidence of Debeljak being politically affiliated to any political party. In June 2012 Toni Balažič was appointed as the President of BoD of Mercator (Tekavec, 2012). Although his appointment is linked with times of "right Government", officially there are no evidences of Balažič's political affiliation.

The case of Elektro Celje (Energy Company), where dr. Vladimir Malenkovič was appointed as the member of BoD in July 2007 (under the government of the right coalition). Malenkovič is also the present President of BoD at Pivovarna Laško d.d. (Brewery Laško) and Pivovarna Union d.d. (Brewery Union) (Pivovarna Laško, 2011) and a member of BoD in Premogovnik Velenje (Coal's mine) appointed in November 2011 (P.C., 2011). He is a member of executive board of City board of LDS Velenje (left party) and was a candidate for local elections in 2002 and

⁶ Slovenian prime minister between 19.12.2002 – 3.12.2004, LDS - left party.

2006 (Official Gazette of municipality of Šoštanj, 2002 and Official Gazette of municipality of Šoštanj, 2006). The political recruitment in the case of Elektro Celje can be observed after the dismissal of Malenković in July 2011, when Marija Žlak and Nikolaj Abrahamsberg were appointed as members of BoD for the mandate till August 2013 (Pi. K., 2011). In June 2012 Slovenian Government (right coalition) demanded the dismissal of Marija Žlak and Drago Štefeta, and as a replacement suggested the appointment of Mirko Zamernik, Miloš Rovšnik (both affiliated with SDS – right party) and Darja Turk (SLS – right party) which was not accepted by the board of Agency for management of capital investments (AUKN - Agencija za upravljanje kapitalskih naložb) (Hočevár, 2012).

The case of Hotels, Casinos and Tourism (HIT), when Branko Tomažič has been the president of BoD from 1999 (under the government of the left party) to March 2006 (under the government of the right party), when he was dismissed earlier due to economic and business reasons. He commented his dismissal being performed for political reasons, similar to other dismissals from the time of the new (right) Slovenian Government (MMC, 2006). He is a member of the (left) party *Zares*⁷ (Zares, 2012). As a new President of Hit's BoD was appointed Niko Trošt and Jana Grbec as a member (affiliated with the larger right party SDS) (24ur.com, 2006). In April 2009 (under the left Government) Trošt resigned from the function as the President of Hit's BoD (Mozorov et al.,

⁷ Formed after the disintegration of the largest left party LDS

2009). In August 2009 (in times of left party) Drago Podobnik was appointed as a new member of BoD (promoted mainly by the ruling SD party, the biggest left party forming the actual government) (Rijavec, 2009), although for Podobnik there are no official data of his political affiliation.

In the case of Nova Ljubljanska Banka – NLB (national bank), Jurij Detiček (a member of Forum 21 - the forum founded by left oriented members) (Žerdin, 2005) was appointed as a member of BoD in June 2010, under the governance of left party. Detiček was also the president of BoD at Adria Bank (Vien), partially owed by NLB, until July 2010. Detiček replaced Stanislava Zadavec Capriolo, who renounced from the position as a member and a President of BoD and vice governor in NLB, appointed in April 2010 (E.N., 2010).

The case of Slovenske Železnice (Slovenian Railways) where dr. Andrej Godec, the leader of the group of Councillor of the left party SD Slovenska Bistrica and a candidate at the elections in 2008 (Socialni Demokrati, 2012 and E-dnevnik, 2012), was appointed as the President of BoD. Godec was appointed in March 2009 (Nova Proga, 2009), thus in times of left Government, but resigned from the position in May 2010. Nevertheless, he maintained the position in BoD of Javni holding Ljubljana (Public holding of Ljubljana) as a director of directorate of Republic of Slovenia for management of investments in public railway infrastructure, appointed in 2009 (Ministry of Infrastructure and space,

2010). The Government appointed Igor Zajec (LDS – left centred party) as new President of BoD in Slovenske Železnice after Godec's resignation. In Autumn 2011 Bojan Brank took the Presidency of BoD, but resigned in March 2012 (Stergar, 2012). Boris Zupančič (SDS, right party) took his position in September 2012 (A. S., 2012), in times of right government, where SDS was a leading party.

In the case of of Modra zavarovalnica d.d. (Insurance company), established by Kapitalska družba (KD), where Borut Jamnik was appointed as the president of BoD in October 2011 (Kapitalska Družba, 2011) in times of left Government. Borut Jamnik is a nephew of Breda Pečan, former member and Vice President of the SD (left party and the leading party of coalition 2008 – December 2011) and former mayor of Izola.

In the case of Luka Koper (Slovenian national port) where Tomaž Martin Jamnik (Borut Jamnik's father), was appointed as deputy chairman of BoD of Luka Koper in October 2009 and resigned in June 2012 (24ur.com, 2012). Gorazd Jamnik (other son of Tomaž Martin Jamnik) is the Head of financial office in Luka Koper, which is predominantly a state company (Demokracija, 2012 and Zgonik, 2012). In the case of Presidency of BoD in Luka Koper when dr. Gregor Veselko was appointed as President in June 2009 (Luka Koper, 2012), during the left Government, and removed from this position in August 2012 (in times of right Government), what was defined by SD (left party) as a typical case

of political recruitment (T. H. and Batista Štader, 2012). His activities were passed to Bojan Brank (Šuligoj, 2012) the President of BoD in Slovenske Železnice for approximately half of year.

For a better view of all above examples, we give the same data in the table below (Table 2).

Table 2: Examples of politico-economic national interlocking directorates in Slovenia in (para) state companies

Government <hr/> Person	Right (SDS) 3.12.2004 – 21.11.2008	Left (SD) 21.11.2008 – 10.2.2012	Right (SDS) 10.2.2012 – present
Zoran Janković (Pozitivna Slovenija – left)	Mercator d.d. President of BoD Appointed in 1997 (under the left government) Dismissed in 2005 (Ž. Debeljak		In June 2012 the appointment of Toni Balažič as the president of BoD

	appointed as the president of BoD in 2006)		
Branko Tomažič (ZARES - left)	HIT d.d. President of BoD Appointed in 1999 (under the left government) Dismissed in March 2006 (N. Trošt appointed as a new president of BoD)	Trošt resigned (in April 2009) In August 2009 D. Podobnik appointed as the oresident of BoD	
Vladimir Malenković (LDS - left)	Elektro Celje Member of BoD Appointed in	Premogovnik Velenje Member of BoD Appointed in	Dismissed in July 2011 (M. Žlak and N. Abrahamsberg appointed instead dismissed in

	July 2007	November 2011	June 2012 (suggested M. Zamernik (SDS - right), M. Rovšnik (SDS - right) and D. Turk (SLS - right), not accepted by AUKN)
Jurij Detiček (member of Forum 21, leftist association)		Nova Ljubljanska Banka Member of BoD Appointed in June 2010 Adria Bank President of BoD until July 2010	
Andrej Godec (SD – left)		Slovenske Železnice President of BoD Appointed in	

		<p>March 2009 (resigned in May 2010)</p> <p>Javni Holding Ljubljana Member of BoD Appointed in 2009</p>	
Igor Zajec		<p>Slovenske Železnice president of BoD (instead of Godec) appointed in Maj 2010</p>	
Boris Zupančič (SDS- right)			<p>Slovenske Železnice President of BoD Appointed in September 2012</p>
Borut Jamnik (nephew of B. Pečan former		<p>Modra Zavarovalnica d.d.</p>	

member and Vice President of SD and former mayor of Izola)		President of BoD Appointed in October 2011	
Tomaž Martin Jamnik (Borut Jmnik's father)		Luka Koper Deputy chairman of BoD Appointed in October 2009	Resigned in June 2012
Gregor Veselko		Luka Koper President of BoD Appointed in June 2009	Removed in August 2012 (B. Brank (Slovenske Železnice) become the president) SD – left party addressed this as a typical political recruitment

Source: Own table

From examples given above it can be deduced that economico-political recruitment in Slovenian *economico-political national interlocking directorates* facilitated certain directors, the management of large (para) state enterprises. Since there was a longer tradition of leftist Governments in Slovenia, compared to the right one, we can speak of leftist directors, who acted in favour of the ruling (left) political parties. However, from the cases it is obvious that same attempts were made in other direction when the right wing took over the government. Nevertheless, in 1991 Law of denationalization was adopted to enable privatization and to avoid clientelism, which was obviously unsuccessful. Instead, national economico-political interlocks emerged and deeply rooted in Slovenian economic and political system, which cooperated for mutual benefits of both. The latter can be seen as a proof of mutually connected and dependence relations in economic and political sphere.

From the cases of Slovenian national economico-political interlocks, one can argue that the original idea of interlocking directorates, as Mizruchi (1992) defined them, was not successful and effective. Slovenian type of national interlocks, connected with political actors (elite) allows privileged groups to influence and control the society, which relates to Mill's power elite. Thus, we can confirm the hypothesis that Slovenian interlocks in its formation and performance act as a power elite. But, since they are a mixture of economic and political crucial actors and policy makers, they can be addressed as *economico-political national interlocking directorates*. Members of Slovenian national interlocking directorates integrate and recruit individuals with similar interests and

necessary resources (money, power, information) from which old members would benefit.

Prašnikar (et al., 2011) conducted a study on a related topic focusing on advisory boards in companies, where the main (heuristic) question was: *Is political interference in supervisory boards influencing the efficiency of Slovenian firms?* In this analysis, which covered the entire period of transition, they measured the political interference by the share of politically motivated supervisory board members. They claim that a company's effectiveness is negatively influenced if there is a greatest share of politically connected persons in supervisory boards. They found out that between 1996 and 2008 in cases when a higher share of board members had clear political involvement and connections this had a negative impact on company's performance (its value added). In addition, when comparing two companies in the same sector (industry) and the same (dispersed) ownership, the company with a lower share of politically affiliated persons in boards displayed higher productivity⁸.

The Slovenian logic of recruitment was discussed by Bernik (1989: 37), who assesses the Slovenian situation still being under the influence of the previous, socialist system in certain areas. He defines Slovenian society as a "*half-modern society*" characterised by "*centrality of the political system*". Some of analysed examples of economic-political recruitment, confirm this statement. There are many more cases alike in

⁸ Nevertheless, from 2008 when the global crisis started, the negative impact disappeared.

the history of Slovenia, thus conclusions in the way that Slovenian economy is always managed by the same individuals holding strategic positions in (para) state companies, can be made.

Nevertheless, interlocking directorates exist also in western societies and might be structured as economico-political associations (see Domhoff 1967; Zeitlin 1974; Useem 1984) act in different ways. For example in the US there are many interlocking directorates, which cover a multitude of different companies, in the same time being present and lobbying at the political level in the form of PAC investments (see Burris, 2005). But American liberal corporatism significantly differ from others (non US) systems, since it favours, first the economy, only then politics (for formation and performance of the US see Fukuyama, 1995). Politicisation of Slovenian economy can be observed in the progress of democratization from the very beginning, since available economic resources and power were concentrated for a long time in politics, which still rules Slovenia and never seriously privatized. Such a long history of state controlled economy makes it difficult to establish circumstances, which would allow the reallocation of resources from politics (public sector) to economy (private sector). Consequently, we still cannot speak about the market oriented economy, since the main administrator of Slovenian national economic wealth is still the state or para-state funds, which are under the government's control.

All said can be connected to Kramberger's (2002: 42) argument that the average decision-making power in Slovenia is concentrated in

instrumentalized networks, which have a more informal character. Informal networks are also important in privatization of public property, which is crucial for a society to adopt the market oriented economy (Róna-Tas 1998: 3 – 4). But Slovenian privatization process did not take place smoothly, since it was/is facing contraband and complications. Transformation of the society had begun even before the formal transition process, which set Slovenia in the group of countries with the so-called "*endogenous transition*". The latter is characterized by spontaneous privatization of state capital, enabled by the ruling parties (elite) with formal institutional changes in the organization of firms and their ownership (Šušteršič, 1999). According to Pinterič (2005), one can argue that incomplete transition is in fact one of Slovenian modern national identity building elements that influences not only economic facts but also general perception of population in this manner.

Conclusion

In the article we were dealing with Slovenian crucial economic and political actors and their role in formation of Slovenian interlocks. The aim was to prove that Slovenian interlocking directorates are formed from economic and political actors (elite) who perform as a power elite. We found several examples in the practices, where on the national level, when speaking about (para) national companies, economic system

strongly relates to political one. We have called this phenomena as *economico-political national interlocking directorates*, enabled by incomplete transition, the lack of private ownership, inhibition of modernisation, absence of entrepreneurship, incomplete and incorrect privatization, strong influence of interest groups in the political sphere, monopolization of markets, cartelization, tendencies for nationalist, protectionist and interventionist economic policy etc. (Pezdir, 2008: 141 – 142). Slovenian political and economic elite took the advantage of this situation for rapid increase of their wealth, power and legitimacy. A large support to Slovenian interlocks was given by banks, which acted in accordance with the requirements of interlocks and public administrators.

Excessive state interference in the economy, "unfriendly" economic regulations, uncompromising transfers and applications of laws from European economies in the Slovenian dimensions, which did not allow the development of market oriented economy and the market itself, inhibited the development of the whole Slovenian economy. This has led to economic centralization and economic malfeasance of political managers in large enterprises, who changed public ownership into the private property.

One of conclusion remarks can base on Rus' (2012) statement in the interview, where he stated that political recruitment does not occur in order to appoint the best people as managers and Presidents of BoDs,

but to ensure a greater share of control over a company, hoping to benefit from such situations. Another conclusion remark may be related to Prašnikar (et al., 2011) when they stated that members of supervisory boards, which are politically affiliated and connected are most likely influenced by their political parties' leaders and interests. And thus, often do not perform independently neither in company's benefit. Nevertheless, a claim: "*No matter what you know, but who you know*" (Woolcock and Nayran, 2000) might be relevant for Slovenian situation of national interlocks.

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