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ARTICLES





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## Formation of Adult Education Policy from a European Perspective

**Abstract:** In the paper, the author provides his opinion on the idea of Europe as a space for developing a European education policy that addresses common European issues. By using the concept of the Europeanisation of education as a methodological tool, emerging European adult education policy is analysed thoroughly. With its formation, adult education has markedly gained in importance and recognition, however it has primarily strengthened only the economic goals of adult education in the EU. European adult education policy is critically analysed at the following four levels: at the level of the purpose that is ascribed to adult education, at the level of construction of valuable knowledge, at the level of formation of desirable forms of subjectivity, and at the level of governance of adult education.

**Key words:** adult education, education policy, European adult education policy, Europeanisation of Education.

### Introduction

Globalisation and the social, economic and political changes relating to it influences today's educational policies and practices on many levels; changes are visible at the economic, political, cultural and other levels (e.g. Ball, Dworkin, & Vryonides, 2010; Burbules & Torres, 2000; Mayo, 2014). However, there is no simple answer to the question of how globalisation influences education policy and practice throughout the world, because the effects of globalisation on education are manifold and contradictory (Dale, 1999). On the one hand they can undermine the sovereignty of nation states, educational institutions and democratic decision-making, while on the other they offer possibilities for the democratisation of public spaces, active citizenship and spaces for the potential transforma-

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tion of individuals and groups. They can encourage instrumental, performative, measurable and (globally) applicable knowledge, or a “knowledge-based economy”, but via information and communication technologies, social movements and local-global networks, knowledge can also serve to empower individuals and groups and support various transgressive practices that have the potential to resist the established order (cf. Biesta, 2006; Usher & Edwards, 1994).

Education policy has internationalised under globalisation processes and become a product of supranational political entities (the EU) and international organisations (the OECD, UNESCO, the World Bank). Some view the latter as “neo-empires of knowledge in education” (Klerides, Kotthoff, & Pereyra, 2014, p. 5) that are endeavouring to enforce precisely defined norms and values and are establishing a “global education policy field” (Ozga & Lingard, 2007, p. 68), in which a coherent range of themes, processes, strategies and discourses is being established at the global level, through which policymakers at the national and international levels are attempting to transform education systems. The transformation of systems is taking place in several ways, for example through the modernisation of individual segments of education systems (e.g. the Bologna reform), through implementation of the concept of globally applicable knowledge (e.g. via the formation of key competences and their verification in the Programme for International Student Assessment and the Programme for International Assessment of Adult Competences), various political instruments (such as the European qualifications framework for lifelong learning, European credit systems, the idea of learning outcomes, quality assurance mechanisms, etc.) and various programmes of the World Bank and the EU (e.g. Lifelong learning, Erasmus+) which provide financial support for the realisation of various reform activities in the field of education.

However, globalisation is not a homogeneous process but one that is associated with three distinct forms of regionalisation – in Europe, Asia and America – each with its own policies and mechanisms. We will focus on understanding these policies and mechanisms in the field of education in Europe, which are being labelled as the “Europeanisation of education” (e.g. Alexiadou, 2014; Dale, 2009; Lawn & Grek, 2012). At the forefront of our interest are the effects of political globalisation, which means that the area of policy is increasingly determined not within the isolated and relatively autonomous nation-states, but is the result of complex interactions at the supranational, international and national levels (Dale, 1999; Milana, 2012a).

The establishment of the EU has significantly influenced education policy, and especially adult education; partly due to the adoption of the concept of lifelong learning in the EU, and partly due to the EU constitutional position, giving

a stronger mandate to the field of vocational education and training. Moreover, within the last decade the EU (specifically the European Commission) has devoted special attention to adult education and learning (Holford & Milana, 2014, p. 4). With the EU, adult education has actually shifted from a relatively marginal field to a prominent one; this shift is being reflected in a change of agenda from adult education to lifelong learning (Holford & Mohorčič Špolar, 2014; Holford, Milana, & Mohorčič Špolar, 2014; Lima & Guimarães, 2011). In this paper, we highlight the process of formation of European educational policy and analyse European adult education policy by using the concept of the Europeanisation of education as a methodological tool. Within this framework we argue that the emerging European adult education policy is fostering above all an instrumental understanding of adult education, knowledge and subjectivity and establishing a new form of governance in adult education.

### **Europeanisation of education**

The concept of Europeanisation first appeared in the 1980s in political studies literature and achieved greater recognition in the 1990s (particularly in the field of European studies), although it does not have a single, clear-cut definition (Klatt, 2014). One of the most cited definitions of Europeanisation is offered by Radaelli, who says that:

Europeanisation consists of processes of a) construction, b) diffusion and c) institutionalisation of formal and informal rules, procedures, policy paradigms, styles, 'ways of doing things' and shared beliefs and norms which are first defined and consolidated in the EU policy process and then incorporated in the logic of domestic (national and subnational) discourse, political structures and public policies. (Radaelli, 2004, p. 3)

As noted by Lawn & Grek (2012), Europeanisation represents the process of forming the EU; it is a political and network-based phenomenon and a specific element of globalisation. Europeanisation reflects the complexity of processes that includes, first, transnational flows and networks of people, ideas and practices across Europe, in which European, national and local actors are involved; secondly, the direct effects of EU policy that via the open method of coordination are reflected in the field of education in the establishment of benchmarks, quality indicators and the comparison of statistical data; and thirdly, the Europeanising effect of international institutions and globalisation (pp. 8–9). In this context Eu-

ropeanisation also means the process of successful integration of candidate countries for EU membership and adoption of “European standards” in various fields. The most evident example of this process in the field of education is represented by the implementation of the concept of lifelong learning, since this is supposed to contribute to making the EU the most competitive and most knowledge-based economy (Mohorčič Špolar, Holford, & Milana, 2014; cf. Maksimović, 2011).

At the turn of the millennium discussions of Europeanisation began to encompass education. The majority of authors identify *the Lisbon Strategy* as a key turning point in the Europeanisation of education (e.g. Alexiadou, 2014; Dale, 2009; Lawn & Grek, 2012; Nóvoa, 2010; Pépin, 2007). Through it, the EU set itself a fundamental strategic objective for the coming decade: “to become the most competitive and dynamic knowledge-based economy in the world” (European Council, 2000, paragraph 5). With *the Lisbon Strategy*, for the first time in history, a direct call for the modernisation of education systems came from the highest level of the EU. *The Lisbon Strategy* identified knowledge and its updating through lifelong learning as a key factor in the future economic and social development of the EU. A consequence of this has been a greater connection of education policy with economic, social and employment policy and also more cooperation in the field of education (Fredriksson, 2003; Pépin, 2007; Rasmussen, 2014). It follows from this that *the Lisbon Strategy* sees education as part of social, labour market and economic policy rather than as an independent “teleological” policy field (Dale, 2009).

We understand the Europeanisation of education as a process in which EU member states, together with the Commission, formulate a policy that becomes “European”. It is a multidirectional process that includes both top-down and bottom-up pressures and the participation of various actors in vertical and horizontal networks and institutions (Alexiadou, 2014). As noted by Klatt (2014), Europeanisation is a three-dimensional concept that includes the infiltration of the policies (rules) of member states at the EU level, the adaptation or transformation of the national policies of member states in accordance with EU policies, and the horizontal exchange of policies among networks of people, ideas and practices throughout Europe involving European, national and local actors.

Within the context of the Europeanisation of education, a “European education policy” that addresses common European issues – closely tied to the fundamental objective of *the Lisbon Strategy* – is being formulated: recognition of qualifications and learner and worker mobility, raising the quality of education and lifelong learning with an emphasis on skills relevant to the labour market and validation of non-formal and informal learning (e.g. Fredriksson, 2003; Rasmussen, 2009; Žiljak, 2008). Considering the historical analysis of the formation

of the EU, Ertl (2006) and Rasmussen (2014) show that the first rudiments of common European education policy can be found as early as the Treaty of Rome in 1957. With this Treaty, the Commission sought to establish principles for common policy on vocational education and training, which was intended to contribute to the more harmonious development of national economies and a common European market<sup>2</sup>.

*The Lisbon Strategy*, which sets specific future objectives for education systems, states that these objectives can only be achieved at the EU level, since they are a response to common EU problems. The mechanism for achieving these objectives is represented by the open method of coordination (OMC) “as the means of spreading best practice and achieving greater convergence towards the main EU goals” (Lisbon European Council, 2000, Article 37). The OMC is applied in the form of soft law via guidelines, indicators and benchmarks, mutual learning, expert opinions, statistical data, comparability of results, and so on. As a policy instrument it contains quantitative and qualitative instruments which member states use to exchange information on “best practices”, leading to the formulation of national education policies in accordance with these practices. Above all the OMC encourages the discourse of the measurability of education and learning and functions in a manner that helps member states formulate education policies in a “commonly” agreed direction in a field in which (because of the principle of subsidiarity) the EU has no legal competences (Alexiadou, 2014, pp. 127–128; Nordin, 2014, p. 145).

The first step in the implementation of *the Lisbon Strategy* in the field of education was the decision of the Council on the common objectives of the future development of EU policies in the field of education and training (European Commission, 2001). The second step, in which the Commission and the Council established a detailed work programme on the basis of the common objectives, was a document adopted the following year known as *Education and Training 2010* (Council of the European Union, 2002). After the end of the ten-year period addressed by *the Lisbon Strategy* (2000–2010), the Commission also defined a strategy for the development of education and training for the next ten-year period (2010–2020) known as *ET 2020* (Council of the European Union, 2009).

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<sup>2</sup> From the 60s to the early 90s of the 20th century, the objectives of educational policy were mainly related to education and training for the needs of the economy and the mobility of workers, although some programs and projects focused also on non-vocational aspects of education; for example, promoting European citizenship, a “European dimension” in education, etc. (Ertl, 2006; Rasmussen, 2014). With the signing of the Maastricht Treaty in 1992 (Council of the European Communities & Commission of the European Communities, 1992), the field of education for the first time in history gained a legal basis at the EU level; Article 126 defines vocational education and training and Article 127 for the first time also defines general education. Both articles exclude any harmonisation of the laws of the Member States in the field of education and introduce the principle of subsidiarity and cultural autonomy.

The latter is part of the broader context of *Europe 2020: A strategy for smart, sustainable and inclusive growth* (European Commission, 2010), a response by the Commission to the growing economic crisis in Europe in 2010.

### European adult education policy

At the EU level, adult education as a policy area was relatively late to develop. Ever since 1996 – the European Year of Lifelong Learning – the EU started to pay more attention to the field of adult education (Milana, 2012a). In 2000 the EU issued *A Memorandum on Lifelong Learning* (Commission of the European Communities, 2000), which threw open the debate on lifelong learning in Europe. The Memorandum states that “the move towards lifelong learning *must accompany a successful transition to a knowledge-based economy and society*” (p. 3) and that Member States’ formal education systems are responsible for ensuring “that each and every individual acquires, updates and sustains an agreed skills threshold” (p. 11), that is, basic skills which are necessary for living in a knowledge-based society and economy. The Memorandum opened up a broad debate and consultation process on lifelong learning in Europe (cf. Gravani & Zarifis, 2014). The same year, the EU established the Grundtvig program, which provided financial support to activities linked to adult education.

Despite this, the first important turning point for adult education did not come until 2006, when the Commission issued the document *Adult learning: It is never too late to learn* (Commission of the European Communities, 2006), which was followed a year later by the *Action Plan on Adult learning: It is always a good time to learn* (Commission of the European Communities, 2007). Both documents were related to *the Lisbon strategy* and *Education and Training 2010* and were intended to contribute to the realisation of both in the field of adult education. Adult education conceptualised as “adult learning” and described as a “vital component of lifelong learning” was meant not only to significantly contribute to European “competitiveness and employability”, but also to “social inclusion, active citizenship and personal development” (Commission of the European Communities, 2006, p. 2). The five main messages from the Commission are to: increase the participation of stakeholders in adult learning; strengthen the “culture of quality” in adult learning; implement systems for validation of non-formal and informal learning, which are associated with learning outcomes and the development of qualifications frameworks; ensure sufficient investment in the education and training of older people and migrants; ensure the quality and comparability of data on adult education, which should be based on Eurostat and

international research data (PIAAC) (pp. 6–10). In order to realise these goals, the above mentioned Action Plan was adopted. The latter set up the framework for monitoring the progress of member states with specific timelines and methods of implementation. For the implementation of the *Action Plan*, the Commission also established a “Working Group on Adult Learning” at the EU level.

A year later these two documents paved the way for the European Parliament *Resolution on Adult learning: It is never too late to learn* (European Parliament, 2008) and the *Council Conclusions on Adult learning* (Council of the European Union, 2008). The Resolution states that “adult learning is becoming a political priority” (European Parliament, 2008, paragraph A) and urges member states “to establish a lifelong learning culture, primarily focusing on education and training for adults, by implementing policies and actions geared to promoting the acquisition of knowledge and making it more attractive and accessible, and permanently updating qualifications” (paragraph 3). It also underlines “the importance of adult learning in order to achieve the goal of creating better jobs in Europe as well as improve quality of life and promote individual development, personal fulfilment and active citizenship” (paragraph 29). In this context it draws attention to the “importance of enterprises forecasting new competences and labour market requirements so that the provision of adult education reflects the demand for skills” and indicates that the “content of education must be tailored to vocational and practical requirements” (paragraph 29). Similar to the Resolution, the Council Conclusions also argue that adult learning can play a key role in “meeting the goals of *the Lisbon Strategy*, by fostering social cohesion, providing citizens with the skills required to find new jobs and helping Europe to better respond to the challenges of globalisation” (Council of the European Union, 2008, p. 3).

These are the fundamental documents formulating European adult education policy in the Lisbon period. In the next ten-year period, which is tied to *Europe 2020*, the fundamental document framing the adult education policy is the *Council Resolution on a renewed European agenda for adult learning* (Council of the European Union, 2011). The Resolution is aimed at “enabling all adults to develop and enhance their skills and competences throughout their lives” (p. 3). The importance of adult learning for achieving *Europe 2020* goals is emphasised. On one hand, adult learning could significantly contribute to reducing early leaving from education and training to below 10 %, beginning with “literacy, numeracy and second-chance measures as a precursor to up-skilling for work and life in general” (p. 3). On the other, adult learning could also significantly contribute to economic development by strengthening “productivity, competitiveness, creativity, innovation and entrepreneurship” (p. 3). By the end of 2020, the Resolu-

tion should contribute to better recognisability of the field through the following measures: by enhancing the possibilities for adults to access high-quality learning opportunities in order to promote “personal and professional development, empowerment, adaptability, employability and active participation in society”; by developing a new approach to adult education based on “learning outcomes and learner responsibility and autonomy”; by fostering greater awareness among adults that learning is a lifelong endeavour “which they should pursue at regular intervals during their lives”; by developing “effective lifelong guidance systems” and systems for the validation of non-formal and informal learning; by developing high-quality formal and non-formal education and training for adults aimed at “acquiring key competences or leading to qualifications”; by ensuring “flexible arrangements” adapted to the different training needs of adults; by raising awareness among employers that “adult learning contributes to promoting productivity, competitiveness, creativity, innovation and entrepreneurship, and is an important factor in enhancing the employability and labour market mobility of their employees”; by making a strong commitment to promoting adult learning as a mean of fostering solidarity between different age groups, etc. (pp. 3–4).

### **Challenging European adult education policy**

As previously discussed in this paper, adult education became especially important with the formation of European adult education policy. Through lifelong learning, adult education is seen as a key instrument for achieving the objectives of broader European social policy. Although the commitment to lifelong learning improved the status, importance and visibility of adult education in the EU, it primarily strengthened the economic goals of adult education, as well as changing the perspective of education to a broader concept of lifelong learning.

By analysing European adult education policy, we have come to the conclusion that European adult education policy (re-)formulates the understanding of adult education at a minimum of four levels: 1) at the level of the purpose that is ascribed to adult education; 2) at the level of the construction of valuable knowledge; 3) at the level of the formation of desirable forms of subjectivity; and 4) at the level of the governance of adult education.

1) Adult education is part of a broader economic, social and employment policy and plays a key role in addressing the socio-economic, demographic, environmental, technological and other challenges facing the EU. It is ascribed a significant role in the achievement of the Europe 2020 objectives since it is seen as enabling greater productivity, competitiveness and entrepreneurship. For this



reason adult education is becoming a political priority in the EU and represents a fundamental part of lifelong learning policy, within the context of which the emphasis has moved from adult education to adult (lifelong) learning; this should pave the way to a “knowledge society”, the competitiveness of the European economy and greater employability (cf. English & Mayo, 2012; Milana, 2012b; Lima & Guimarães, 2011). Although the promotion of personal development, social cohesion and active citizenship are also highlighted as goals within adult education – goals which have substituted the historical commitment of adult education to democracy, social justice and emancipation – these always appear in the background of the fundamental objective of competitiveness and employability, or as a function of the achievement of this objective (cf. Popović, 2014, p. 192). In adult education, functional goals and measurable outcomes of education and learning have prevailed, resulting in the growing importance of statistical and international comparable data in education (e.g. PIAAC) (cf. Borer & Lawn, 2013).

2) Knowledge is expressed in the conception of a knowledge-based economy, or in the provision of the skills that are essential in order to promote the growth and competitiveness on which the productivity of Europe depends. Knowledge is understood as an investment and a strength that can ensure the “right” skills for the economy in altered social circumstances. The emphasis is on knowledge that can be measured, for which reason references to knowledge alternate with the concept of “learning outcomes”, which are designed to ensure that adults have the skills and competences necessary for the European labour market.

3) European adult education policy is also endeavouring to establish a new form of subjectivity; a flexible subject who is capable of adapting rapidly to a flexible labour market, precarious forms of employment, growing cultural diversity and lifelong learning. Lifelong learning, which emphasises constant learning – learning to update skills, to find employment, etc. – and changes the individual in the direction of desired forms of the self – flexible workers and learning adults, self-actualised individuals, active citizens, etc. – endeavours to optimise the individual’s economic, psychological and social potentials in order to produce “subjects who know”, which is how it defines the “normal” learner, the good worker, the active citizen. Conversely, the individual who rejects lifelong learning – as a participant in education, worker or citizen – is labelled “deviant”. When lifelong learning is connected to the individual responsibility of the individual, the prescribed subjectivity of the “European citizen” is also established; a European citizen is a person who participates in lifelong learning, since this rep-

resents European order, the order of learning (Edwards & Nicoll, 2004; Nóvoa & Dejong-Lambert, 2003).

4) The new form of governance (OMC) that has been implemented in the field of adult education at the EU level aims to improve the coordination of policies and guide reforms in the adult education systems in member states through the use of soft law via guidelines, indicators, benchmarks, and so on. It functions by helping member states formulate their own policies in a commonly agreed direction and enables the transfer of policies from the European to the national level. As a policy instrument it also represents a mechanism of soft governance – a form of governance “at a distance” (Lawn & Grek, 2012, p. 69) – that takes place via the established EU institutions, networks, seminars, expert groups, associations, etc. in which various interest groups participate and formulate adult education “policy” on the basis of statistical data and comparable standards.

A number of critical reflections may be directed towards a European adult education policy conceived in this manner. Such a policy places in the foreground a view of education that is above all instrumental (Biesta, 2006), where adult education is understood as an instrument for the achievement of specific predetermined outcomes and objectives; education is an instrument for the inclusion of adults in a precisely defined order, i.e. the social order of competitiveness, stability and success, and for the establishment of predetermined subjectivities of adults, i.e. good workers, citizens and lifelong learners. In such a concept of adult education, which is designed to increase the productivity of adults and maximise their skills, we recognise above all the realisation of the concept of “governmentality” (Foucault, 2007; cf. Fejes & Nicoll, 2014; Simons & Masschelein, 2006; Usher & Edwards, 1994). Such a conception of adult education also represents a clear departure from the humanistic tradition of education in Europe, in which education has value in itself and knowledge is understood as a value, and leads above all to a “colonisation of the educational world” (Habermas, 1984; cf. Deakin Crick & Joldersma, 2007; Fleming, 2010), in which the language game of performativity and efficiency has prevailed (Lyotard, 1984; cf. Usher & Edwards, 2007). The danger of such a discourse, which reduces knowledge to a single criterion of financial and technological efficiency, is that it affords no room for the acquisition of knowledge that does not only have instrumental value but is essential for the broader intellectual, aesthetic, moral and social development of the adult (cf. Jelenc Krašovec, 2012). In this way, within the universe of possible knowledge, value is only ascribed to specific knowledge and a specific form of its organisation, with the result that this knowledge is legitimised as “official knowledge” (Apple, 2000).

## Concluding remarks

In this paper we have shown that globalisation processes have had a powerful impact on the field of education; education policy has internationalised and become a product of supranational political (EU) and international organisations (OECD, UNESCO, World Bank), which has led to the establishing of a global and a European space of education policy. Focusing on European education policy field and using the concept of Europeanisation of education as a methodological tool, we have highlighted the fact that adult education policy is formulated on the basis of complex relationships and dialogical tension between the supranational and national levels, as an exchange of policies, ideas and practices involving European, transnational and national actors. Although the adult education as a policy field has developed relatively late at the level of the EU, it became extremely important with the formation of European adult education policy, and especially with the enforcement of the concept of lifelong learning. However, if the commitment to lifelong learning improved the status and importance of adult education in the EU, it also strengthened the primarily economic goals of adult education. The European adult education policy sees adult education as a direct response to the processes of economic and technological globalisation or as a response to the current socio-economic changes in the EU (economic crisis, unemployment, the aging population). As we have shown, European adult education policy encourages in particular the instrumental understanding of adult education, knowledge and subjectivity. First and foremost it is a concept of knowledge (so-called learning outcomes) which has a useful, effective, measurable and market value. Moreover, adult education represents an instrument for achieving the European order of competitiveness and desirable forms of subjectivity, i.e. lifelong learners and flexible workers and citizens. For the implementation of European adult education policy a new form of governance, which takes place via established EU institutions, networks, seminars, etc. – where various interest groups formulate adult education policy on the basis of statistical data and comparable standards – was introduced. The main threat to such instrumentalisation of adult education lies in its reduction to a system of financial and technological efficiency, which on the one hand reinforces the pragmatic-economistic paradigm of adult education and on the other reduces the ability of adult education to broaden its intellectual, aesthetic, moral, social and political development of adults.

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## Stvaranje politike obrazovanja odraslih iz evropske perspektive

**Apstrakt:** U ovom radu autor izlaže svoje viđenje o ideji Evrope kao prostora za razvoj evropske obrazovne politike koja rešava probleme koji su zajednički za celu Evropu. Uz pomoć koncepta *evropeizacija obrazovanja*, detaljno je analizirana novija evropska politika obrazovanja odraslih. Kada je ona nastala, obrazovanje odraslih je primetno postalo važnije i cenjenije, iako je najpre samo ojačala ekonomske ciljeve obrazovanja odraslih u EU. Evropska politika obrazovanja odraslih je kritički analizirana na sledeća četiri nivoa: na nivou svrhe koja se pripisuje obrazovanju odraslih, na nivou izgradnje korisnog znanja, na nivou formiranja poželjnih vidova subjektivnosti i na nivou upravljanja u obrazovanju odraslih.

**Ključne reči:** obrazovanje odraslih, obrazovna politika, evropska politika obrazovanja odraslih, evropeizacija obrazovanja.

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## Plus ça change, plus c'est la même chose: Adult Literacy Since 2000 – a Civil Society Perspective

**Abstract:** Adult education policy is being shaped at the international level through several instruments – global commitments, agreed agendas, global programmes and common actions. Literacy is widely recognized as one of the most important goals on the global agendas – including both the EFA, adopted in 2000, and the more recent SDGs. The authors have taken active part in the creation of policy and have been able to conduct an analysis of the concepts, actors and events, and of policy planning and implementation. In the paper they offer an examination of the role of literacy in the the EFA, and its absence from the MDGs. Through their analysis of the documents and text, and monitoring reports and research, the authors show that there is a large gap between policy plans and results, and highlight the reasons for the failure, which may impact the achievement of the SDG agenda too. Their main focus is on the civil society perspective – as an important partner in global policy-making, civil society offers concepts and approaches that may help in overcoming the existing gap and achieving better results in the field of adult literacy. Examples from several continents are given and advocacy is stressed as one of the main instruments for more effective NGO participation in decision-making and dialogue about adult education at the global level.

**Key words:** adult education, adult literacy, MDG, SDG, civil society.

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## Literacy in the global agendas

Anyone reviewing progress towards universal literacy for young people and adults over the fifteen years since the adoption of the Education for All (EFA) targets in Dakar in 2000 would have to recognise just how modest progress has been. It is clear that resources and political will have failed to match the commitments made there by national governments and development partners. Successive EFA Global Monitoring Reports have shown just how little progress has been made on the adult education goals – with 775 million adults still lacking literacy in 2014, a gain of just 2 % in 14 years (UNESCO, 2006, 2008, 2014).

Also the 2015 Global Monitoring Report (GMR)<sup>3</sup> makes clear that the adult literacy goal (EFA4) of halving the number of adults without literacy by 2015 was the overall EFA goal on which least progress was made. (UNESCO, 2015a, p. 137). Worldwide, the adult illiteracy rate will have fallen by only 23% by 2015, far short of the 50% target; Only a quarter of countries reduced their adult illiteracy rates by 50% a further 19% are close to the target. In 2015, 757 million adults are lacking minimal literacy skills, of which two-thirds are women, a percentage virtually unchanged since Dakar. Just in India, 264 million adults (one third of the global total) cannot read or write in an official language, and half of all women in Sub-Saharan Africa are denied the right to literacy (UNESCO, 2015a).

The fact that the whole adult education approach within the EFA, and that was ignored in the MDGs, was criticised because of the “discourse that accommodated adult learning only in terms of adult literacy or skills training” (Almazan-Khan, 2000), but even such a narrow goal is far from being fulfilled.

As for the wider adult education dimension of EFA 3, a lack of data disguised the weakness of the achievements. (UNESCO, 2015a, p. 111). Indeed, the devastating conclusion offered by the GMR is that the only significant improvement in literacy rates overall resulted from cohort effects – the arrival of more literate young people into adulthood, and the deaths of significant numbers of older people without literacy skills. (UNESCO, 2015a, p. 143). And this is despite the real achievements of countries as varied as China, Nepal, and in the Latin American *Yo Si Puede campaign*, or of the UK among industrial countries (UNESCO, 2015a, p. 137; UNESCO, 2010; UNESCO, 2006a, pp.

<sup>3</sup> The Global Monitoring Report is the main instrument for assessing global progress towards achieving the EFA goals. It is an analytical, evidence-based report monitoring progress toward EFA and education-related Millennium Development Goals. It tracks progress, identifies effective policy reforms and best practice in all areas relating to EFA. In May 2015, GMR received a mandate from the World Education Forum to begin monitoring the post-2015 education goal and targets, adopted by the UN, and since then it has changed its name to the Global Education Monitoring Report.

39-48; Wikipedia, 2015; DfES, 2001). Even at the times when the overall ratio of the illiterate population was decreasing, this was mostly due to improvements in a few countries, and in particular in China, while the overall figure increased (UNESCO-UIS, 2012, p. 8).

The GMR highlights four key explanations for this – the lack of political will; the failure of campaigns to make a sustained impact; the low incidence of mother tongue as a medium of instruction, and the absence of a wider literacy culture for new readers to join. We might add two more – the major resistance in some communities to see women and other politically marginalised groups empowered through literacy, and of course the shortage of enough qualified and skilled teachers (UNESCO, 2015a).

As a result of the failure overall to make progress on EFA 4, (achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults) the impact of development investment in a number of other areas covered by the Millennium Development Goals was inhibited. This is because the informed consent and engagement of adults, which literacy secures, is necessary for the success of measures to provide access to clean water, to secure improved maternal healthcare and declining infant mortality, to reduce the incidence of HIV and AIDS, and for measures to respond effectively to climate change and to improve sustainability. In all these areas, improvements are more effective where the affected adults, but especially women, are literate. And where mothers read and write, their children learn more effectively in and outside school. (Motschling, 2012; Schuller et al, 2004; OECD, 2007).

It is all the more strange that such evidence did not influence the concept of and approach to literacy in the new global agenda. It is still very reductive and simplified (the targets under SDG 4 mention only literacy and numeracy, with very vague success indicators: “By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy” – UN, 2015a<sup>4</sup>), the concept of family literacy is not included, and the research evidencethat it is more effective to view literacy as a continuum, with progressive stages where the basic abilities are only the first step, and not as a polarised phenomenon: where you are either literate or not literate. Also the concept of literacies or multiliteracies as complex, multi-branched abilities, is not directly reflected in the new agenda. In spite of the call for ‘evidence-based approaches’, scientific and research results and evidence have had little influence on the creation of the agenda. So, the question could be asked: Did we invest enough time

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<sup>4</sup> Even the word ‘substantial’ does not contain a clear numerical value, which is the case with many other targets, nor does it express significant political will for its implementation.

and energy to analyse what was achieved, to draw a balance and set the new agenda based on a solid basis of knowledge and information about what went well, and what did not?" (Popović, 2015, p. 66).

Among the main recommendations of GMR 2015 related to adult literacy, probably only one will be addressed in the future – to support mobile phone use and other ICT platforms. The other two – to make literacy acquisition more visible, and to link literacy and learning policies with development strategies and community priorities (UNESCO, 2015a; Benavot, 2015) are left to the uncertain implementation.

The approach to literacy within EFA was criticised because literacy was seen isolated from the other goals (Torres, 2011, p. 43), rather than in context, and not in interrelation with other goals, but this approach remains much the same in the new agendas.

In spite of the satisfaction and delight over the adoption of SDGs, it is also impossible to avoid feeling pessimistic about prospects for adult literacy as a result of the 2015-2030 Sustainable Development Goals settlement agreed in New York in UN, in spite of the intense co-operative work over four years between the EFA Steering Committee, civil society partners and member states, which culminated in the consensual agreements made at the World Educational Forum in Incheon, in May 2015 (UN, 2015a; UNESCO, 2015b).

This fine work was conclusively undermined by the decisions of the Financing for Development conference in Addis Ababa, which excluded resourcing for adult literacy, and wider adult learning altogether (UN, 2015b). It might be over-optimistic to expect adult education to be high on the agenda at such a meeting (it was mentioned indirectly, only in the context of gender equality, and the need for "an educated work force... productive employment and decent work" - UN, 2015b, p. 37<sup>5</sup>), but the fact that a conference on 'financing for development' can fail to even mention literacy as one of the important means for achieving development goals and goals in development cooperation, is worrying. There is only a call for global information literacy, and promotion of financial literacy (UN, 2015b), but there is no action planned.

While literacy is not addressed sufficiently in the Agenda 2030, there is an impression that at least the data about literacy are important, and there is a call for the collection of data and precise monitoring, which fits with the prevailing tendency of defining indicators, formulating and precisely measuring outcomes,

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<sup>5</sup> SDG 4 focuses on this aspect in two of its targets: "4.3. By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university; 4.4. By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship" (UN, 2015a). (underlined by authors)

and a somewhat naive focus on increased measuring as the means to progress in a given field. But even there literacy is off the programme. Since 2010 literacy has not been one of the indicators of human development. In the previous Human Development Index, “Education or ‘knowledge’ was measured by a combination of the adult literacy rate and school enrolment rates (for primary through university years)”, but from 2010 onwards, it will be “measured by combining the expected years of schooling for a schoolage child in a country today with the mean years of prior schooling for adults aged 25 and older.” The recommendation came from UNESCO Institute from Statistics, and the explanation was that “Adult literacy used in the previous HDI (which is simply a binary variable – literate or illiterate, with no gradations) is an insufficient measure for getting a complete picture of knowledge achievements. By including average years of schooling and expected years of schooling, one can better capture the level of education and recent changes” and further “literacy rates and school enrolment and life expectancy have ‘natural’ caps (100 percent, mortality limits, and so on [and so] forth)...” (Zavaleta Reyles, 2010, pp. 15, 16, 24). In the absence of easily useable data literacy was simply taken off from the list, without a commitment to produce a more effective measure of adult literacy competence.

As a result the education community is back where it was in 2000, needing to use the education goal and its associated target to inspire regional and national action, without the proper underpinning necessary to its achievement. The topic will doubtless be back in 2030, with the arguments that the universal right to learn includes adults, and the rhetorical commitment to ‘no one left behind’ will ring hollow when even now we have 757 million formally recognised as lacking literacy (and of course the real number is significantly larger), two thirds of whom are women, as well as some three billion adults with very low literacy levels (UN, 2013).

Despite its efforts, civil society needs to recognise that it, along with colleagues in the education ministries who signed up to the Incheon agreement, have failed to convince finance ministries and the major multilateral development partners that youth and adult literacy is a fundamental base for development, and a necessary pre-condition for inclusive democratic citizenship. The World Literacy Forum estimates the cost of illiteracy to the world economy as 1.2 trillion dollars – but we still lack the kind of authoritative estimate successive GMRs have offered about the cost of universal primary schooling (World Literacy Forum, 2015). Halfway to the EFA, in 2007, Harvey stated that “commitments to eradicate illiteracy, for example, sound hollow against the background of substantial and continuing declines in the proportion of national product going into public education almost everywhere in the neoliberal world. Objectives

of this sort cannot be realized without challenging the fundamental power bases upon which neoliberalism has been built and to which the processes of neoliberalization have so lavishly contributed” (Harvey, 2007, p. 187).

In 2015, there is fewer political will, less commitment and less resources, and the challenges are even greater. “The Post-2015 euphoria is not taking into account the fact that the majority of the factors and reasons that influenced the implementation of MDGs and EFA are not just still present, but they have actually worsened” (Popović, 2015, p. 72). The question is, are there any realistic grounds for optimism about literacy achievements within the new global agenda?

### **Global advocacy for education**

Civil society, as an important partner in the creation of global education policy, has recognized the size of the task remaining in convincing the actors across the development agenda of the central catalytic role of literacy and wider adult learning.

Given this position, it is important to learn the lessons – positive and negative – of the last fifteen years, in order to maximise possibilities in the period ahead. Civil society organisations accept responsibility for advocacy on behalf of the interests of adult learners, and those who work with them, and to provide platforms for the voice of learners to be heard in debates. They are under-represented in policy creation even more than they used to be: in the previous period, there were many organizations arguing for learner voice representation in international fora affecting adult learners (NIACE in UK, UIL etc.); at the CONFINTEA VI conference, “Learners’ voices were included in the work of the conference, and an international learners’ charter was presented to the conference, and future commitments to strengthen learner participation were agreed” (Tuckett, 2015, p. 30), although, compared to CONFINTEA V, space became limited for civil society contributions and thus so did the possibility for the clear articulation of the needs of various group.

Even the extensive consultations in the Post-2015 process did not prove to be inclusive for different paradigms, partners and voices despite the large volume of consultative meetings and mechanisms: “...[T]he current consultative process has failed to establish a broad international dialogue capable of giving voice to counter hegemonic world views” (Ireland, 2015, pp. 40-41). MDG and EFA agendas were criticised by many authors for the missing voices (which points to their ‘colonial’ character), and the newer ones have not improved much in that respect. Unterhalter and Dorward (2013) believe that the Post-2015 discus-

sion still has not adequately articulated the top-down and bottom-up approach – plenty of groups are included, but many voices are still missing.

Civil society does not only represent the voice of groups that lack access to policy-making, very often it serves to protect the public interest. As Yusuf argues: “Civil society participation in global governance brings to bear an issue of interest in negotiating processes dominated by the articulation of country interests and provides a voice to a growing transnational public interest.”... “If participatory democracy is to be meaningful, its tenets must penetrate the opaque walls of multilateral institutions and reflect the voices of the people: ‘Nothing for us without us’.... Active CSO engagement is a must...” (Yusuf, 2014, p. 189).

Civil society does not of course possess formal power to secure change internationally – despite its recognition and the inclusion of its representatives in UN processes. Its financial power is modest, and party-political power at the global level is almost symbolic. However, there are other mechanisms that other actors do not have to the same extent – the large number of those they represent, their strength and commitment, as well as strong alliances, which creates significant social pressure and thus helps to achieve the goals. (Popović, 2014, p. 228)

In relation to EFA, CSOs benefited from the reorganisation of the EFA architecture. The UNESCO EFA Secretariat provided consistently high quality support to the Collective Consultation of NGOs supporting EFA (CCNGO), as did CCNGO’s elected representatives, who crafted NGO position statements that had a considerable influence on the EFA Steering Committee’s position papers for the Dakar World Education consultation in 2012, and, more importantly, for the EFA Forum in Muscat. Nevertheless, they were much less successful in securing the support of the Global Partnership for Education, whose priority, in line with the Millennium Development Goals, was overwhelmingly focused on universal primary education (see: Fernandez et al, 2015), while adults are ‘left behind’, as far as GPE is concerned. “The focus of the GPE does remain very much the formal school system, covering, pre-primary, primary and lower secondary. Thus far there has been little or no coverage of adult literacy or technical and vocational skills development” (King & Palmer, 2014, p. 39), which was confirmed by Julia Gillard, chair of the GPE, in Addis Ababa, saying that the money committed by the world’s governments and development partners simply cannot fund adult literacy, and that civil society will need to raise the resources – a strategy surely designed to ensure the continued marginalisation of the marginalised.

As the debates on future development priorities crystallised around the need for Sustainable Development Goals, education CSOs recognised the need for advocacy on a wider canvas. They were determined to argue that since education is a fundamental human right, and since literacy is a basis for the achievement of other rights, as the Jomtien declaration in 1990 had recognised, it was essential to get these long standing international commitments reinforced (UNESCO, 1990). They called for targets, financing, monitoring and practical strategies to ensure quality inclusive provision (including more and better trained teachers) in the new international development agenda, if universal adult literacy was ever to be a realistic outcome. On a practical level, too, the voluntary sector is determined to share best practice, aided by powerful support from the UNESCO Institute for Lifelong Learning (UIL) and its literacy network.

In the run up to the 'Rio plus 20' conference, a coalition of CSOs substantially based in Latin America, worked together to produce a common platform – *The education we need for the world we want* – drawing on the inspiration of the World Social Forum, and contributed inside the formal conference, as well as to the civil society festival. However, despite the work, there were just two references to the education of youth and adults, and no recognition of the importance of literacy to effective sustainability (Education Working Group, 2012; UN, 2012).

Education CSOs had a similarly difficult job in making an effective contribution, at least initially, in the New York consultative processes, since education was not recognised as one of the nine major groups through which NGO representations were channelled. In the early meetings of the Open Working Group charged by the UN to take the Rio agenda forward, adult education was absent from the discussions, apart from a single Scandinavian contribution. The Global Campaign for Education and Education International worked in close co-operation with the International Council for Adult Education which had a long-standing role in the work of the women's major group (one of the nine recognised by the UN<sup>6</sup>), and with it the chance to present at meetings of the Open Working Group.

Working together through fringe seminars, and intense lobbying CSOs were able to complement UNESCO's work in advocating the alignment of the educational goal and targets of the Open Working Group with that of the EFA Steering Group. A key focus of CSO work was seeking to highlight the fact that

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<sup>6</sup> In 1992 it was recognized that achieving sustainable development requires the active participation of all sectors of society and different groups of people. Based on that, Agenda 21, adopted at the Earth Summit in 1992, formalized nine sectors of society as the main channels through which broad participation would be facilitated in UN activities related to sustainable development. These sectors are officially called *Major Groups*: Women, Children and Youth, Indigenous Peoples, Non-Governmental Organizations, Local Authorities, Workers and Trade Unions, Business and Industry, Scientific and Technological Community, Farmers.



the UN Secretary General's vision for Post-2015 – 'No-one left behind' – was incompatible with an aspiration merely to 'increase adult literacy by x percent.' By the time of the World Education Forum in Incheon in May 2015 CSOs were reassured that the literacy target was for all young people and adults, and correspondingly deflated when the later UN texts weakened that commitment for the Sustainable Development Goal target to 'substantial increase in adult literacy', and especially frustrated following the conclusions of the Financing for Development conference (Fernandez et al, 2014).

What is clear is that effective and sustained partnership has forged a strong CSO alliance in education, which works effectively in co-operation with UNESCO and member states in the EFA process. But it is also clear that the catalytic effect of adult literacy is not well understood by most UN agencies (with the exception in particular of UN Women), and that major multilateral development partners remain unconvinced. As one senior World Bank official told once, 'We tried adult literacy in the 1980s, but it doesn't work'. Her scepticism was matched in the finance ministries of many countries – in the EFA Steering Committee, education ministers declared their frustration at being unable to capture the attention and support of their finance ministers or heads of state for the agenda. Making the broader case for adult literacy as a key tool for development, supported by a range of research evidence, new methodologies for data collection and monitoring, and a new methodical approach, would help to find a more efficient and sustainable solution for this problem, otherwise even the modest aspirations related to literacy cannot be achieved.

Among the most common mechanisms civil society uses to make space in the global policy architecture are advocacy, lobby, campaigning and building partnerships and alliances for common goals (Popović, 2014).

### **Regional and sub-regional advocacy, partnership and innovation.**

In addition to advocacy aimed at international agreements, civil society organisations work at the regional, national, city and sub-regional levels, linking these levels and bringing the problems and experiences of their countries and regions to the global level, and, at the same time, translating global topics, trends and commitments to the national level, thus increasing global solidarity and interconnection (Popović, 2014, p. 219). They play an important role in data collection and dissemination, creation, monitoring and implementation of policies (with lobbying and advocacy serving as important instruments), they collaborate with other actors, for example with business stakeholders, "in many issues and areas in

order to provide novel approaches to social problems through multistakeholder networks” (Held, 2010, p. 35). Very often, civil society organisations compensate for the failures of the national education system and government policy, completing or improving on it, whereby global alliances and links to global commitments represent an important medium in policy creation and implementation at the national level.

In Latin America this has taken the form of a continental regional forum following up the commitments made at CONFINTEA VI in Belém with active and dynamic civil society participation (UIL 2011). In South Africa a regional variant on the learning city – ‘the Learning Cape Initiative’ brought statutory and CSO agencies together to plan education programmes, including literacy, designed to foster development (Education Center for Innovations, 2006). In Asia in particular, the development of national EFA coalitions has supported literacy developments within the framework of a wider coalition of educators committed to the full range of Education for All goals. Notable amongst these is the work of the NGO coalition, the Campaign for Popular Education (CAMPE) in Bangladesh, whose enthusiastic support for Community Learning Centres has seen significant progress made in most of the EFA areas, but again with slower progress made on adult literacy despite a commitment in the government’s election manifesto to eradicate illiteracy by 2014 (CAMPE, 2015, Prity, 2014).

The government of India passed legislation to secure women’s and girls’ entitlement to literacy, but it is a right that has needed to be secured village by village, given the strength of traditional caste and class perspectives. Nirantar, which has been celebrated with a UNESCO International Literacy award, works in the Lilitpur region of Uttar Pradesh, to ensure that Dalit (untouchable) women can have access to literacy, and to train them as tutor/advocates, to extend provision to their peers. It is not easy work since it can upset existing power balances as newly literate adults take a more active role in local decision making, and meet hostility and resistance. Nor is its work – once again literacy related – in highlighting the dangers of child marriage and early pregnancy. Nirantar illustrates the way CSOs can act as partners of government, ensuring that centrally agreed policies can be delivered to the benefit of marginalised communities (Tuckett, 2015a).

In a similar way the voluntary organisation Andar Pintal works with nomadic peoples across a range of Saharan countries, including Mali and Burkina Fasso. Whilst government provision is offered for settled communities, Andar Pintal provides literacy for young and older herders – and negotiates the right of girls to education (albeit offered separately) as a pre-condition for classes to be provided for young males. CSOs can, at their best, work flexibly and innovatively to reach under-represented communities (Tuckett, 2015).

Flexible and responsive education is not always limited to support for government programmes and aspirations. Following the breakdown of civil administration after the Haiti earthquake Defenders of the Oppressed organised education programmes, embedding literacy in programmes to create barefoot legal workers to protect land rights (Tuckett, 2013, p. 388)

In the work of the Ayto in the Philippines to secure recognition for mother tongue learning; and the work of Transfermemos in Colombia in creating a rich literacy and post-literacy culture of learning in Colombia, CSOs have pointed the way to new and creative ways of engaging youth and adult learners in shaping their own programmes (Doyanan, 2014; UNESCO, 2012).

In addition, of course, CSOs play a role in monitoring and research to ensure that the interests of under-represented groups are heard, and no organisation has a more impressive track record of that in recent years than ASPBAE, the Asian South Pacific Association for Basic and Adult Education. ASPBAE's detailed literacy survey in the Solomon Islands, replicated in Vietnam showed levels of illiteracy at three times the official level, and its gender monitoring was an exemplary illustration of the positive impact NGOs can have on public policy (ASPBAE, 2007).

### **Future perspectives on literacy in policy context**

If the global policy commitments on education are to be realised, and the gap between policy planning and realisation reduced, there can be no alternative but to continue to make the needs of adults without literacy visible to policy makers internationally – both to avoid the waste of so much human potential, and to avoid the collective shame implicit in denying basic human rights to so many, and merely waiting for them to die off. The alliance between UNESCO and its Collective Consultation of NGOs will need to continue and be strengthened to ensure that the SDG indicators adopted by the UN contain an explicit reference to youth and adult literacy, and that progress towards their achievement is effectively monitored.

Despite the powerful research evidence from the OECD, from the University of London Institute of Education and from the European Union among others, the impact literacy has on positive health outcomes, increased longevity, and on poverty reduction is still not sufficiently widely understood. Sustained research and creative advocacy is essential to make this understood by decision makers and by the populations they serve (Motschling, 2012; OECD, 2007; Schuller et al., 2004).

Particularly notable benefits are those related to various aspects of family life and these deserve not only further research, but also better promotion. There is an important role to be played by informed, evidence-based advocacy work. Literate adults have a positive impact on their children's learning, and family and inter-generational literacy programmes can help to create and sustain the wider culture of literacy highlighted as a major challenge in the GMR.<sup>7</sup> Teaching literacy in adults' mother tongue is critical for effective engagement, and, of course, there is an urgent need for more qualified and skilled teachers.

Innovative programmes, making creative use of mobile technologies, have a place, but will not replace the need for face-to-face dialogue-centred learning.

These are issues that can be addressed centrally, but it seems clear from the variety of illustrations of locally effective practice highlighted above that it is often at a sub-national or more local level that creative responses can be found to overcome inertia and weak resourcing. To that end, CSOs will need to join in the renaissance of the learning cities movement, to ensure that the place of adult literacy in development is clearly understood. That will help, too, in strengthening alliances across the development agenda with funders, policy makers and other CSOs alike.

One key task, thankfully recognised in the SDG process, is to improve the quality of data, to enable analysis of participation as it affects under-represented and marginalised groups. For that to happen, skills in the analysis of disaggregated data can be developed by CSOs, by academia and by officials to ensure that there is healthy and well-informed public monitoring of progress. But it will also be important to build on the developments that recognise that acquiring literacy is not a one-off, context-free event. The main change needed to overcome the failures in literacy work of the preceding period is to reflect on the dominant discourse and rewrite the key concepts, shifting the dominant paradigm of literacy to one which focuses on 'literacies', recognising the complexity of uses needed for different contexts.

But perhaps most important of all, in the context of the development of global citizenship, it is necessary to build advocacy programmes designed to marshal the economic and social case for adult literacy in such a way that civil society partners and researchers engage effectively with the finance ministries and

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<sup>7</sup> There are plenty of studies proving this: Bus, A., Jzendoorn, M.H. & Pellegrini, A. (1995). Joint Book Reading Makes for Success in Learning to Read: A Meta Analysis of Inter-generational transmission of literacy. *Review of Educational Research*, Vol. 65, no.1, pp. 1-21; Brooks, G. et al. (1996). *Family literacy works*. London: Basic Skills Agency; Oxenham, J. (2006). *Education for all adults. The forgotten challenge*. Washington DC: World Bank; Lozano, R. et al. (2011). Progress towards Millennium Development Goals 4 and 5 on maternal and child mortality: an updated systematic analysis. In: *The Lancet*, 378, pp. 1139-1165; OECD. (2013). *Skilled for Life? Key Findings From The Survey of Adult Skills*. Paris: OECD Publishing.

multilateral funders, in order to have better informed policy and decision making, more synergies in implementation and more sustainable results. No small task, but a necessary one.

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## ‘Što se više stvari menjaju, sve više ostaju iste’: Pismenost odraslih od 2000 god. - stanovište civilnog društva

**Apstrakt:** Politika obrazovanja odraslih se na međunarodnom nivou stvara pomoću nekoliko instrumenata – globalnim obavezama, dogovorenim agendama, globalnim programima i zajedničkim akcijama. Pismenost je široko priznata kao jedan od najvažnijih ciljeva globalnih agendi – uključujući Milenijumske razvojne ciljeve i Obrazovanje za sve, obe usvojene 2000. godine, kao i nedavno usvojene Ciljeve održivog razvoja. Autori su aktivno učestvovali u stvaranju politike i imali su priliku da analiziraju koncepte, učesnike i događaje, kao i planiranje i primenu politike. U ovom radu oni iznose pregled uloge pismenosti u Milenijumskim razvojnim ciljevima i Obrazovanju za sve. U svojim analizama dokumenata i tekstova, kao i izveštaja monitoringa i istraživanja, autori su pokazali da postoji veliki jaz između planova politike i rezultata i istakli razloge tog neuspjeha koji mogu da utiču i na postizanje Ciljeva održivog razvoja. Posebno su usredsređeni na perspektivu civilnog društva – kao važan partner u stvaranju globalne politike, civilno društvo nudi koncept i pristup koji može pomoći da se postojeći jaz premosti i postignu bolji rezultati na polju pismenosti odraslih. Navedeni su primeri sa nekoliko kontinenata, a javno zastupanje je istaknuto kao jedno od glavnih oruđa u efikasnijem učešću nevladinih organizacija u donošenju odluka i dijalogu o obrazovanju odraslih na globalnom nivou.

**Ključne reči:** obrazovanje odraslih, pismenost odraslih, Milenijumski razvojni ciljevi, Ciljevi održivog razvoja, civilno društvo.

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## Studije baštine kao temelj očuvanja humanističkog obrazovanja<sup>2</sup>

**Apstrakt:** U radu će se raspravljati o krizi znanja kao humanističkom problemu razumevanja sveta. Ovaj odnos će se postaviti kao ključni za objašnjenje takozvanih revolucija u nauci. Učestalost novih istraživačkih paradigmi kao karakteristika razvoja nauke i filozofije od sredine XX veka pokreće rasprave o modelima racionalnog objašnjenja sveta i o modelima njihovih razumevanja i prihvatanja. U tom novootvorenom prostoru susreću se različita disciplinarna iskustva sveta, čija nasleđa su objašnjiva iz pozicije umeća pamćenja. Heritologija, kao teorija ovog poslednjeg, nastupa sa jednim, istorijski utišavanim, modusom saznanja celovitosti sveta, koji se imenom *predstavnosti* nudi diskurzivnom objašnjenju kao komplementaran. Upravo u toj subordinaciji vidimo izrazit slučaj transdisciplinarnosti kao nade za napredak racionalnog znanja. U savremenom shvatanju nasleđa zatura se njegova humanistička osnovanost u antičkom izrazu *kalokagatije*. Lepo je ono što je dobro. Dobro se u svom bogatom obrazovnom trajanju razumevalo kad kao sreća (u otkrivanju), kad kao uživanje (u saznanju), kad kao korist (u delanju), no uvek je to što je preovladavalo u nekom vremenu određivalo i njegovu ideju univerziteta. Ako se pak pogleda šta je zajedničko ideji kulturnog dobra i ideji univerziteta, lako je uočljivo da se one sreću na prostoru javnosti. Javnost dobra je kategorija vrednosti, koja silno utiče na sve savremene menadžmentske modele izbegavanja opšte koristi, odnosno favorizovanja modela uspešnosti/kompetitivnosti, koji sledeju doktrinu liberalnog kapitalizma. Kako se savremena ideja baštinstva, razapeta u našim uslovima odrastanja između *lapota* i *šoping mola*, spasava u univerzitetskom programu, biće pokazano na primeru studija baštine (od osnovnih do doktorskih) Seminara<sup>3</sup> i Centra za muzeologiju i heritologiju Filozofskog fakulteta u Beogradu. Biće prikazano kako je održanje humanističkih ideala svake zajednice

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zavisno od očuvanja javnosti dobra i stvaranja dostupnosti obrazovanja, oličenog u lepoti saznanja, za svakog pojedinca.

**Ključne reči:** baština, patrimonium, kriza nauke, humanizam, ideja univerziteta, kulturno dobro, heritologija.

## Kriza znanja kao kriza pamćenja

### *Prilog legitimnosti transdisciplinarnog naučnog razumevanja*

Kada se u košmaru disciplinarnog nadmetanja kojim je potrošena poslednja etapa naukovanja i filozofiranja u XX veku progledalo trezveno, postalo je nevažno kome pripada reaktuelizacija ovog golemog pitanja. Važno je bilo da su postala legitimnim pitanja granice disciplinarnih moći, štaviše, diskurzivnih paradigmi uopšte te racionalnog postignuća u objašnjenju sveta i pronalaženja smisla znanstvene slike stvarnosti. Zapravo, psihotično iščekivanje novog milenijuma počelo je celu deceniju unapred ne samo simbolično, padom *Berlinskog zida*, ali da, zbilja, sa tom varljivom nadom da se simbolička igra pojavljuje kao modus zadovoljenja znatiželje. Gledano sa iskustvom od desetak godina u novom milenijumu, može se tvrditi da je sva mučnina pitanja egzistencije, istine, novusa, pragmatizma, progressa, profita i/ili sreće, kao i sva druga pitanja koja su dobila tako stabilnu legitimnost u kritičkoj nauci šezdesetih, sedamdesetih i osamdesetih godina XX veka, zamenjena poletnošću nadgornjavanja – kompetitivnošću. Kompetitivnost, kojom se i najavljiavo XXI vek kao vek znanja, odigrava se pak u sistemu u kome su optimalno standardizovana konvencionalna delovanja u disciplinarnim istraživanjima sveta. Okvir je standardizovao forme i zaštitio pravo delovanja, a ne predmet i smisao naučnog postignuća. Tako se postignuća u standardnom delovanju legitimno svodi na kvantifikacijske iskaze, pa je rangiranje zamenilo i smisao delovanja. Na taj način je izigrano jedno od najznačajnijih postignuća kibernetičkog ubrzanja otkrića sveta, opšta informatička teorija i njen uticaj na opštu metodologiju naučnog objašnjenja. Ova je i prihvatila informatologiju ne zbog statističke servilnosti već, pre svega, zbog reafirmacije svojih nezaboravljenih holističkih učenja. U njima, dakako, *svako nešto* ima semiotički potencijal samo ako ga naziremo (ako ga investiramo) kao gradivo ili graditelja u sistemu, ako uopšte mislimo celinu, makar je i ne znali (činjenički). Mnostvo nečega čemu se može utvrditi samo svojstvo forme, a često je to vrhunac realno dostupnog istraživanja, još ne garantuje više od vrlo posredovane poručivosti. Taj nivo konstituisanja informatičkih sistema je izrazito pasivan i još nema potencijal socijalne činjenice, te se i izgradnja vrednosnih sistema samo na tim pasivnim pokazateljima čini nedostatnom za konstataciju naučnog novusa i njegovo raspršivanje.

Svest o novusu u naučnom pogledu na svet je već posledica kulturacije, te je njeno održanje predmet kulturne i obrazovne izgradnje. U tom nužnom udomljenju znatiželje o svetu, sada više nego na isteku XX veka, jedna teorija nudi svoje objašnjenje istrajne moći predstavnice slike sveta – muzejske, dakako. I ona je, po opštoj modi, standardizovana i brendirana da bi bila obezmoćena – ili, u žargonu kritičkog kraja XX veka, *spektakularizovana* – pa će nam stoga biti veći izazov da je tretiramo s aspekta njenih konstitutivnih moći.

### Kriza humaniteta

U kauzalitet koji nosi ideja *XXI stoleće kao era kompetitivnosti* učitana je projekcija prosperiteta utemeljena na znanju. Era, koju će presudno obeležiti učinak znanja, bila bi nedosanjani san svih ranijih utopija. Poželjno – da, ali iskustvo zbori da je neostvarivo, sem ako se u ovoj projekciji ne skriva neki oblik *diktature znanja* po modelu demokratije kao *diktature većine*, nasuprot istorijski već potvrđene nemoći *apsolutizma znanja*, dekartovskog tipa, na primer. Dakako, u širem socijalnom kontekstu sintagma *era kompetitivnosti*, čini se, pre svega potvrđuje stanje dostupnosti (opet utopijski) znanja zahvaljujući tehnologiji proizvodnja i distribucije, prihvatanja i razmene informacija. U tom značenju proklamacija *nove ere*, zapravo, aminuje dominaciju kompetitivnosti *vlasnika*, imaoca informacija, pre svega, a ne *kreatora* znanja. Na taj način je *era kompetitivnosti* počela, pre svega za razvijene zajednice, znatno ranije. Zapravo se to desilo definitivnim tehnološkim preuzimanjem prostora globalnog informisanja – integrisanjem lokalnih mreža u internet, to jest u poslednjoj dekadi XX veka. U tom smislu nije teško zamisliti savremene *banke podataka* kao svojevrzne hramove za klanjanje – jer imaju snagu izvora svih moći. Sada su one samo stvarnije od svih dosadašnjih izvora vere jer objektivnom moći kapitalizacije znanja mogu da stvore realan profit. Idealno gledano, to jeste otvorena mogućnost za sve misleće ljude, ali u praksi ne postoji zabeleženo istorijsko iskustvo o takvoj socijalnoj strukturi u kojoj je dominantan sloj znanstvenika. Najviše u tom smislu su nudile zajednice koje su na principu razvoja kreativnosti jednaku društvenu brigu poklanjale misliocima i praktičarima, pa su akademije za veštine, za uzdizanje tehnike rada i inovacije u proizvodnji omogućile stvaranje kreativnog sloja društva jednako vrednog onom misaonom, naučnom i umetničkom. Izgledalo je da u društvima visoke harmonizacije, po principima dobrog društvenog ugovora za sve delatne članove, postoji progresivna hijerarhizacija od statusa: (1) *osposobljavanja* članova zajednice za obavljanje rada (i istovremeno za neposrednu eksploataciju), (2) *obučavanja* za naplatu uložnog rada (na delu je strukovna sigurnost od neumerene eksploatacije) te (3)

*znanja* koje su stekli oni zainteresovani za unapređenje svog rada ulaganjem svoje kreativnosti do uloge inovatora. Tek ovi potonji su u situaciji da razmenjuju svoje usluge po tržišnim principima vrednosti. Samo one zajednice koje su u viziji svog prosperiteta računale na ovaj kreativni doprinos i formirale sistem obrazovnog negovanja na *akademijama rada*, mogle su da računaju na neprekidan priliv kreativnih delatnika. U suprotnom, nosioci inovacija su prelazili u status vlasnika kapitala, a dalji proizvodni i, posledično tome, društveni procesi su išli na štetu prve dve kategorije delatnika i članova zajednice.

Zašto znanje nije dominantan faktor u socijalnoj strukturi, te time i *era kompetitivnosti* upućuje na nešto drugo? Zato što se do znanja dolazi sporo i zato što je proces uvek do samog kraja neizvestan. Time je znanje skupo, to jest spada u, ekonomskim rečnikom kazano, *sporu korist*. Stoga se pre može reći da investiranje u znanje izrazito obeležavaju trenutne, akutne potrebe. Investiranje u znanje je, tako nas uči istorija, najčešće iznudica velikih socijalnih kriza. Na primer, samo iz novije istorije, nagli razvoj kibernetike nakon bar tri veka tavorjenja uslovia je, kako je pokajnički naveo u delu *Kibernetika i društvo* iz 1950. godine njen reanimator Norbert Viner, neodložna potreba američke mornarice da izađe iz pat pozicije u sukobu sa Japanom u II svetskom ratu. Takođe, pandemije izazivaju potrebu za velikim investicijama u naučna istraživanja. Dakako, kao što farmaceutska industrija može dirigovati imunološkim sistemima, tako je i kapitalno ubrzanje globalne kompjuterske mreže (WWW) dirigovano potrebom efikasne informatičke kontrole.

Šta će onda tu uopšte kultura, možemo se zapitati.

Upravo zbog toga što samo čovek koji se *pita* može biti svestan koristi i štete globalnih sistema. Savremena *globalna zajednica* nije prvi *Komonvelt* u istoriji. Samo kada se pitamo, potvrđujemo da imamo iskustvo da smo „pili sa tog izvora“. Svejedno u kojoj *akademiji* – znanstvenoj, radenoj ili *umskoj* (baštinskoj). Jednostavnije rečeno, samo takozvana kulturna informacija (Tuđman, 1983) nije golo sakupljanje podataka koji su konačni u svojoj naučno objektivnoj pouzdanosti, ali takođe i, paradoksalno, etičkoj neutralnosti. Samo kulturna informacija nastaje na strukturnom povezivanju konteksta u kome podaci postaju svrsishodni i smisleni svakom pojedincu koji se pita. A pita se svako ko pamti, ko se oslanja na nasleđe, na svoju kulturu, dakle.

U nasleđu koje doživljavamo kao svoje postoji stalnost obnavljanja humanističkog ideala harmoničnog odgajanja uvek kada se uspostavljaju novi društveni odnosi ili pak stvaraju čvršći društveni ugovori. Koliko god velike društvene promene bivaju ekonomski determinisane, te time primarno vođene materijalnim interesom, sam proces okupljanja oko zajedničkog interesa angažuje sve iskustvo koje pojedinci do tada imaju, kako bi posvojili viziju boljitka. U

svakom odlučivanju presudan značaj ima upravo kultura sećanja. Ona se javlja u istoriji promena kao kritični nedostatak uvek kada se pretera sa naglim transformacijama društva. Kada se najveći deo populacije usmerava na nove profesije, pojedinci se lako poistovećuju sa svojim kvalifikacijama. Svaki tendirani nominalizam, pa i ovaj, vodi slabljenju društvene uloge nosioca razvoja. Ovo proizvodi anomaliju da ga dostignuta *kvalifikacija* udaljava od šireg konteksta društvenog odlučivanja. Štaviše, svodi ga na elemente proizvodne formule, koja je obrnuto proporcionalna podsticanju radne kreativnosti već u otkrivanju smisla sopstvenog profesionalnog usavršavanja. Društvena kritika dogmatskog razumevanja profesionalizacije kao profitnog progressa ostavila je u nedavnoj istoriji niz ubedljivih primera u širokom prostoru društvenog delanja, od obrazovne do umetničke prakse. Profesor Maks Imdal (Imdahl, 1986, str. 49–82) dugo će ostati zapamćen po svom ingenioznom poduhvatu „Kako radnicima hemijske industrije Bayer objasniti apstraktno slikarstvo?“. Profesor je u nizu strpljivo planiranih seansi razgovarao sa radnicima pred nekim primerima apstraktne slikarske umetnosti. Razgovori su trajali toliko dugo dok profesor Imdal nije mogao da zaključi: „Hvala vam što ste mi objasnili kako razumete ove slike!“

Sa druge strane, Dušan Makavejev je filmom *Čovek nije tica* (1965) na ubedljiv način zagrizao problem dogmatske formule *kultura radnicima* kada je prikazao debakl sinfonijskog izvođenja IX Betovenove simfonije u radničkoj hali. Ovaj problem, najtačnije opisan kao bahatost kreatora formula, svejedno da li onih profitnih ili ideoloških, despotskih, najradikalnije je uzvratio establišmentu Jozef Bojs praktikujući u svom umetničkom i akademskom radu *socijalnu skulpturu*. Zapravo, propagirajući podsticaj svakom da bude umetnik, tj. da svoju kreativnost oslobodi u izgradnji najbolje zajednice. Dodatno je zanimljivo da je ovaj nemački profesor umetničke akademije sa najvećim posvećenjem delovao prema svim ljudima, a da je u akademskom kurikulumu rado i tendirano zamenjivao umetničke silabuse onim o slobodi i/ili demokratiji. Osnovao je *Organizaciju za direktnu demokratiju* i *Slobodni internacionalni univerzitet za kreativnost i interdisciplinarna istraživanja*, a *Nemačku studentsku stranku* je smatrao svojom najvećom skulpturom. Iako je računao na artikulaciju za masovnu recepciju, Bojssov projekt delovanja nije podrazumevao parcijalna korišćenja. Prošireni pojam umetnosti, počivajući na projektu procesa oblikovanja, proizilazi (utopijski) iz vrlo promišljeno odabranog sistema obuhvatnog shvatanja umetnosti. Kako je sam Bojs zadao:

Objekti su posmatrani stimulansi za transformisanje ideje skulpture ili umetnosti uopšte. Oni treba da provociraju mišljenje o tome šta skulptura može da bude i kako koncept oblikovanja može da se ra-

stegne do nevidljivih materijala, dostupnih svima. Po tom zadatku utvrđuje tri stepena razvoja:

- mišljene forme – (ili) kako modelujemo svoje misli,
- govorene forme – (ili) kako oblikujemo svoje misli u reči,
- društvena skulptura – (ili) kako modelujemo i oblikujemo svet u kome živimo: Skulptura kao razvojni proces: Svako kao umetnik. (Tisdall, 1979, str. 8–9)

Ovaj Bojsov oblik direktnog učešća u kulturnom proizvodu, u kome se anulira dejstvo nominalne kvalifikacije, do neke mere su zloupotrebili pripadnici Partije zelenih uvlačeći ga u izbornu listu za Parlament. No, danas se može reći da je ova praksa angažovanog utkivanje ideje akademskog oblikovanja svakog člana zajednice ostavila makar neki didaktički trag. Bojs ju je primenjivao obuhvatno i intenzivno sedamdesetih godina XX veka, pre svega u nemačkoj zajednici. U njoj je pak, prevashodno kod mlade intelektualne populacije, zbog zakasnelog otkrića bliskog negativnog nasleđa II svetskog rata, široko i često bolno razbuđena svest o društvenoj odgovornosti, naročito nakon studentskih protesta 1968. godine. Vrlo brzo je Bojsova praksa socijalne skulpture internacionalizovana, ali, tendirano sakato, kroz očvrslu institucije sistema umetnosti i kritički otupljena međ zidovima pomodnih galerija i ispraznih kulturnih revija. Time je njen društveni uticaj sveden u domen didaktike. Nije mu se moglo ne priznati da ume da uvuče običnog čoveka u svoj performans. Ali, smisao i sadržaj angažmana koji je u svetu bio dopustiv osamdesetih godina dvadesetog veka u takozvanim razvijenim zajednicama pažljivo se suzbijao u auru umetničkog, sa jasnim prizvukom egzistencijalne neupotrebljivosti. Bojimo se da je ovovremeni, jedinstveni ili bar preovlađujući kredo kulturnih politika muzeja – interaktivni programi – jedno vrlo sarkastično „priznanje“ Bojsovom doprinosu reafirmaciji demokratske akademije (za narod).

Uprkos tome što su njegove  *kreativne akcije*  imale veliku privlačnost za široke društvene grupe, sam Bojs je odbijao da ga svrstavaju u proroke jer je držao da svaki  *aktivizam*  potiče iz  *prošlog stupnja svesti* , te stoga mora da se  *poziva na veru u božansko objavljnje* . Naprotiv, on je sebe video kao pedagoga  *u potrazi za načinima uticaja na ljudski razvoj* . Ti se  *načini*  izvode, precizira Bojs,  *iz normalnog mišljenja kao sposobnosti koja se razvila tokom prethodnih kulturnih faza* . Kako on sam pravi ovu suptilnu razliku između svog poslanstva i nehajne (kao  *šamanske* ) umetničko-kritičarske recepcije istog, čita se u njegovoj tvrdnji da je paradigma  *o čoveku kao proizvodu svoje sredine*  poluistina koja se koristi kako bi se struktura moći sredine koju je stvorio čovek održala onakvom kakva je. Izrekom, Bojs smatra da je „ja“ bez sumnje čovekovo besmrtno jezgro – nazovimo ga jednostavno

njegovom višom prirodom, koja, kako bi se dalje razvijala, utelovljuje sebe“. Pri tome misli da se to zbiva u *materiji kao iskustvu*, a ne kao sastojku. „To je ono“, smatra njegov pouzdan tumač G. Jape (G. Jappe), „što je izvorno hrišćanstvo razumelo, a Bojs vidi jasnu paralelu između izopačene nauke i institucionalizovanog hrišćanstva. I jedno i drugo, prema njegovom mišljenju, počinje tako što materiju ozbiljno shvata kao mesto utelovljenja, i jedno i drugo je, zaokupljeno ispitivanjem kosmosa, zanemarilo uzroke i svrhu utelovljenja“ (Jappe, 2003, str. 51). Suštinski, čovek je slobodan u meri u kojoj je kreativan, to jest, pledira Bojs, on

„može da donosi odluke onog časa kada otkrije *tačku slobode*. To može da učini samo ako je svestan da povեսno uslovljena sredina ne daje nove uzroke, nego samo posledice, da samo prežvakava postojeće znanje. Nešto novo može ući u svet samo čovekovim individualnim samoobjašnjenjem u životu. To je u apsolutnoj protivrečnosti sa sociologijom, koja izvodi svoje stavove o svetu iz pitanja koja društvo samo sebi postavlja, bez ikakve arhimedovske tačke koja referira izvan sebe same. Ta je referentna tačka za Bojsa sloboda, a ona se može postići samo kreativnošću i tu kreativnost on zove umetnost. Umetnost je tako svaka aktivnost koja čini čoveka nezavisnim od preduslova – od društva i njegovih ideja“ (Jappe, 2003, str. 51).

### *Doba kompetitivnosti*

Područje kulture u strategiji participacije u svetu kompetitivnosti dragoceno je polje u kome se mogu integrisati vizije celokupne perspektive jedne zajednice. Ono u najširem smislu objedinjuje pojedinačne napore nauke, obrazovanja i uređenja čovekovog praktičnog delanja – rada i održanja. Upravo tu je neophodno *utelovljenje`ja`* kao stvaralačke emanacije. Ako je *strategija* skup sposobnosti i veština, onda je predviđanje njeno bazično svojstvo. Projektovanje predstojećeg, kao modelovanje očekivanog, podrazumeva iskustvo, tj. poznavanje svih prethodnih modela istovrsnog ili strukturalno sličnog ponašanja. Iskustvo, svoje i drugih, može stvoriti samo gajena veština očuvanja pamćenja. *Veština* u praksi odgonetanja stvarnosti obezbeđuje napredak *znanja*, a ono stvaranje jasnije i izvesnije slike budućnosti. Kompetitivnost *mnemozofije*, kao heritološke teorije, kako je pre četvrt veka definisao profesor Tomislav Šola (Šola, 2003, str. 301–319), čini se „providenskom“ za XXI vek. Baštinjenje je cilj svake strategije nezaboravljanja (Bulatović, 2005). Ono u aktivnom smislu podrazumeva prepoznavanje vrednosti, njihovo *očuvanje* i živu, ali *sećajuću* vrednosnu kulturnu proizvodnju.

*Očuvanje* ima dva lica: *tvarno* – trezorsko i *refleksivno* – tezaursko. Tvarno iscrtavaju takozvani međaši pamćenja – reprezentativni (*monumenti*) nosioci dokumentarnosti (izvora istinitosti), a oličeni su u nacionalnim, državnim aparatom šticećenim, kulturnim trezorima. Refleksivno lice ima ulogu prozora na trezoru u koji se zagleda svaki nosilac novog života ili, da konkretizujemo, svaka materijalna i duhovna aktivnost koja nastaje na osnovama nezaboravljanja radi u prilog usvajanja zajedničkog jezičkog i, posledično tome, leksičkog fonda – tezaurusa – kojim će se od zaborava trajno čuvati kulturne vrednosti prošlosti. Iskustvo nasleđivanja je svojevrsni proces sećajućeg gledanja u budućnost, da samo ovlaš parafraziramo hermeneutičku teoriju slike Gotfrida Bema (Boehm, 1987). Svrha jednog lica baštine, trezorskog, jeste da bude ugledni deo oblikovanja (obrazovanja, stasavanja) i napredovanja, a drugog, da potvrdi smisao nezaboravljanja. Da u procesu stalnog kretanja, promena, živa produkcija bude i napredovanje, a ne samo ponavljanje i ugledanje. Ogojeno ponavljanje rituala sopstvene tradicije, naročito u masovnoj i popularnoj kulturi, pak ozbiljno ukazuje na opadanje sećajućeg vrednovanja. Ovo opadanje vremenom transformiše baštinske vrednosti u stereotipe obožavanja bez upita o smislu – u fetišizaciju. Golo podražavanje spoljašnjih formi tradicijskog običaja, na primer, predstavlja najniži stepen sećajuće produkcije, tj. onaj u kome imamo sve pred sobom, ali smo zaboravili smisao slika i rituala. Čak i u tom obliku, tj. u stanju svesnosti da smo zaboravili stvarni sadržaj nasleđa, imamo svest o njegovoj, kao odsutnoj, vrednosti. U odnosu na kulturnu produkciju u kojoj postoji golo ugledanje, tj. ponavljanje forme kulturnog obrasca u kome ne samo da nemamo sećajući sadržaj već i ne možemo da imamo osećaj nedostatka, ponavljanje je, ipak, održavanje minimalne živosti ideje napretka, dok je u ugledanju jedina ideja iscrpljivanje stvari.

Ako je održiva, najmanje jedan vek ako sledimo A. Šastela (Chastel, [1986] 1988), teorija relativnosti u razumevanju sveta i sa njom ideja o *sadašnjosti prošlosti* kao jedinom obliku njenog postojanja (Riegl, [1903] 2006), onda su sve *strategije nezaboravljanja* u funkciji izgradnje vizije budućnosti.

Ako nam je dozvoljeno da zamišljamo generalnu strategiju, podsetili bismo na ono što se u literaturi zove *japansko čudo*. Kada su se nakon kataklizme u II svetskom ratu u Japanu zapitali kako se povratiti i obezbediti budućnost, zaključili su da je od strateške važnosti to što su ostrvska zemlja, što ih *okean* (1) povezuje, čuva i hrani, najvećim delom, potom je bitna *tradicija* (2), ono što ih održava kao grupu, zajednicu i kulturu, a kao treće, ono što će im obezbediti budućnost – *znanje* (3), nauka – u tom trenutku je to bilo, ne bez sarkazma, ono što ih je kao stranu u ratu porazilo, a to je visoka tehnologija, elektronska. Od trenutka kada se njihova vizija počela ostvarivati, više nijedna, ničija strategija nije mogla da ignoriše novu *paradigmu održivosti*, ovu koja obećava očuvanje



harmoničnosti u korišćenju *prirodnih resursa, negovanju pamćenja* kroz očuvanje tradicije i neprekidnom *obnavljanju vrednosti u novim znanjima*.<sup>4</sup>

### Izlaz iz zaborava

Ovo uvođenje u krizu obrazovanja kao krizu humanističke paradigme okončali smo primerom koji upućuje na jedno postignuće veka koji je nedavno istekao. *Japansko čudo* ukazuje na snažan egzistencijalni poriv koji svoje utočište nalazi u javnim dobrima. Tako se netom i zbililo, jak osećaj kolektivnog identiteta načinio je homogen stav baštinika o javnim dobrima japanskog tla. Štaviše, ovo je primer koji navode svi programeri vizija progressa zato što je postao jedna od najmoćnijih metafora slobode i prava. Javno dobro je i mera vrednosti i materijalni garant za pravo svakog pojedinca da načini svoje postignuće i tako ojača meru dobra za sve, za svakog.

Bilo da se na snagu javnog dobra gleda kao na jedan kulturni (japanski) varijetet jedne stare kategorije (*dobro*), bilo da se misli na modernu modifikaciju, kako je *javnost* formulisao J. Habermas (Habermas, 2012), tek za tu snagu vere koja se angažuje kod svakog pojedinca na specifičan, no na jednako moćan način, uvek se računa na obrazovanog pojedinca. Pritom, potvrđivanje snage volje u ostvarenju postignuća na nenarušenim resursima sopstvenog dobra, zapravo, računa na snažno obrazovanog pojedinca. Tu snagu nikada nije oličavala ona strana hegemonije u kojoj je znanje postajala alatka protiv čoveka kao prirodne jedinice. Naprotiv, snaga obrazovanog pojedinca priziva, naročito nakon *japanskog čuda*, humanističku paradigmu obrazovanja.

Da li na ovaj način padamo u naručje još jednoj od utopija za koje se verovalo da su ostale u istoriji sa istekom XX veka, veri u moć *univerziteta* kao opšte socijalne kategorije i sinonima za ljudsku snagu? Verovatno da, ali bez svesti o toj upitnosti ostajemo lak plen nesmirenih tehnoloških paradigmi i tzv. humanih protetika kao idealima budućeg čoveka. Koliko je ova potonja sintagma naslućena kao suprotnost prirodnom čoveku, upozorio nas je, već citirani, Jozef Bojs, koji je uzeo kao polaznu činjenicu da se u evropskoj povesti razvila ideja o znanju koja se utemeljuje u aristotelovski iniciranom materijalizmu. Iako se materija, sa svim svojim zakonima, kao sadržaj univerzuma vekovima analitički razrađivala do najsitnijih detalja, a danas te detalje, što poetski, što iz nemoći,

<sup>4</sup> Celovitu viziju o kulturnom okruženju u strategiji kompetitivnosti dali smo u studijama: Bulatović, D. (2010). Kulturno nasljeđe; Očuvanje i uslovi kulturnog okruženja; Vrednovanje kulturnog nasljeđa. U: Crna Gora u XXI stoljeću – u eri kompetitivnosti. Kulturno okruženje / Montenegro in XXI century – in the Era of Competitiveness, Cultural Environment, Posebna izdanja (monografije i studije), Knjiga 73, sveska 9, Podgorica: Crnogorska akademija nauka i umjetnosti, 39–48, 49–59, 61–70.

imenujemo čak i sa *božanska čestica*, Bojs nije smatrao formalnu logiku, matematičku interpretaciju sredine, konačnim odgovorom, već samo prelaznim stanjem. To stanje ne održavaju na vlasti naučnici, nego *tehnokrate*, koje pokušavaju da logiku i matematičku interpretaciju učine nedodirljivim. Suprotno tome, Bojs je renesansnu eksperimentalističku misao i metode video kao podsticaj građanske slobode. U prilog tom mišljenju možemo dodati da je Galileo Galilej bio jednako značajan likovni kritičar kao što je i Leonardo bio značajan inovator, konstruktor, tehnolog. Štaviše, Aleksandar Koare (Aleksandar Koyre) ističe presudan značaj saglasnosti „između estetičkog i naučnog stava slavnog Firentinca“ koliko i strasno brani Leonarda od napada za *sholastičku nepismenost*, podupirući svoju tezu o jedinstvenosti istorije filozofske i naučne misli (Koare, 1981, str. 96–129). Kako nalazi G. Jape, Jozef Bojs je i Francusku revoluciju video kao podrazumevanu svrhu eksperimentalističke misli:

Upravo kao rezultat određenog naučnog poimanja, građanstvo je dobilo moć i stvorilo društveni poredak zasnovan na podeli rada. I kada su već i najgori negativni rezultati, što se tiče proletarijata, bili izglašeni, građanski je nagon za samoočuvanjem mogao napredovati samo uz pomoć tehnokratije, jer su dve osnovne ideje građanskog društva, podelu rada i vodeću ulogu nauke, tehnokrati proširili na celokupno društvo – premda to proširenje više ne služi čoveku nego samo neprekidnoj tehnološkoj revoluciji. Funkcionalizam građanske pozitivističke nauke razvio se, nauštrb ispaćenog čovečanstva, u vlastiti cilj. Revolucija, eksperimentisanje, naučna objektivnost pojmovi su koji su nekada imali oslobađajuću ulogu u borbi protiv feudalne, klerikalne i druge samovolje. Danas se oni preobražavaju u vlastitu samovolju koja počinje da mrsi evolucijski proces koji vodi u oslobađanje čoveka. [...] Bojs ne vidi vruga u samoj tehnologiji, nego u njenoj upotrebi sopstvene moći da liši čoveka prava na samoodređenje, pa čak i na samu mogućnost somoodređenja. (Jappe, 2003, str. 50)

Nasuprot preovlađujućem stavu savremenih društvenih zajednica, koje svakog pojedinca sklonog tvrdnji da je *misao primarno polje iskustva* nužno svrstavaju u pitomce apstraktne naučne misli, Bojs tvrdi baš suprotno, odnosno da je *zadatak misli učiniti stvari opipljivim*, sa sledećim obrazloženjem:

Osnova postojeće ideje o univerzitetu je filozofija, sposobnost da se reduciraju najrazličitije pojave na logički, apstraktni zajednički nazivnik; ali apstraktni su kodifikatori iskustva, uronili u vlastite

probleme, zaboravili da čovek nije samo formalan, logički entitet. Tu nastupa umetnost. Osnova obrazovanja mora biti kreativnost: stvaranje stanja uma koje se da osetilno zapaziti ličnim delovanjem. Osoba koja studira filozofiju obično ne postaje filozof, nego inženjer, recimo, ili učitelj. Na isti način, obrazovanje iz kreativnosti neće proizvesti izvoran *talent* za tržište umetnosti, nego biologa ili agronoma s određenim poverenjem u svoja rešenja. Čak i ako se ta rešenja pokažu kao divlje neortodoksna ili strašno pogrešna, pojedinac će prestati da bude puki funkcionalni zubac (karika u lancu) u sveobuhvatnom sistemu. Pozitivistička ideja o objektivnom dokazu nije time postala nevaljana, ali je prevaziđena njena tvrdnja da je ona jedini mogući put te tako postaje samo jedan od mnogih puteva. U toj meri je umetnost, kao kreativnost fizički manifestovana, jednaka životu. [...] Kao cilj, sve to sa sobom nosi opasnost privremenog haosa, a otuda i opšti nemir što se manifestovao u praksi na Umetničkoj akademiji i u teoriji u masovnim medijima... (Jappe, 2003, str. 50)

Zbog ovakvih stavova i akcija, Bojs je izbačen sa Akademije, što je izazvalo nov polet kod njega, pa je sa H. Belom osnovao *Slobodni univerzitet* u Diseldorfu 1974, kao i niz međunarodnih, studentskih i drugih udruženja i inicijativa u rasponu od onih za razvoj direktne demokratije do onih za neprekidni dijalog (*Muzej kao mesto stalnog dijaloga*).

### *Kompetitivnost humanističkog poslenika*

Dakako, pitanje kako ostati u zajednici (univerzitetu) uvek je aktuelno, a danas nam se natura krilaticom *kako biti efikasan u tranziciji*. Želimo da pokažemo kako se ideal efikasnosti može obremeniti humanističkim idealom *kalokagatije*<sup>5</sup> na primeru baštine kao javnog dobra. Lepo je ono što je dobro. Dobro se u svom bogatom obrazovnom trajanju razumevalo kad kao sreća (u otkrivanju), kad kao uživanje (u saznanju), kad kao korist (u delanju), no uvek je to što je preovladavalo u nekom vremenu određivalo i njegovu ideju univerziteta. Iz ove paradigme će izaći na videlo, malo čim utemeljena, predominacija nauke u savremenim modelima uspešnosti. Značajnije od savremene hegemonije kompetitivnosti iskršava i pitanje obrazovanja kao negovanja dobra, kao etičkog poslanstva na koje je stroga nauka imuna. U toj opoziciji predstavljamo i kako je zamišljen da se realizuje

<sup>5</sup> (*καλός και αγαθός*, u nemačkom idealizmu *καλόκαγαθία* predstavlja pojam dobrog telesnog i duhovnog obrazovanja – nem. *Bildung*).

u jednom harmoničnom društvu program negovanja baštinka i obrazovanja za baštinjenje.

Dakle, *javnost baštinjenja* (kulturni tezaurus) uslovljava zajednicu u iskustvu (*Univerzitet i znanje*). U tom smislu, biti efikasan u tranziciji je pre svega pitanje kako rehabilitovati sopstvo. Dobar osećaj za javno dobro ukazuje da kod pojedinca postoji svest o posvećenosti dobru, ali i potreba da se ta posvećenost oяви, da se socijalizuje kao poslanstvo. Svaka posveta u postupku poslanja prema zajednici materijalizuje se *zapisom*. Zapisi spomena na dobro koje podržavaju svi činioци zajednice, zapisi u pamćenju. Jezički isklesani i ostavljeni na vidiku svih, za napajanje i naricanje, predstavljaju prave tezauruse zrenja kulture. Očvršli u jezičkim metaforama, podatni za svekolike gradnje slika i priča, oni su i graditeljska uporišta svih identiteta. Uvek i prava slika oblikovanja duha.

Shodno onom kako Ž. F. Liotar nalazi da:

Znamo da se oko reči formiranje/obrazovanje (*Bildung*) pa tako i oko pedagogije i *reformе* u filozofskom razmišljanju od Protagore, Platona i Pitagore odigrava najznačajniji deo. Naime, oni pretpostavljaju da duh ljudima nije dan na odgovarajući način, te da ga treba preoblikovati. Detinjstvo je za filozofe čudovište. Ali ono je i njihov saučesnik. Detinjstvo im govori da duh nije dan. Ali da je moguć. (Lyotard, 1990)

Smatramo važnim da ukažemo na pojmovnu razliku koja postoji između *stvari* i *dobara*, te da razlikujemo *inventar predmeta* od *tezaurusa dobara*. Zapravo, predmeta će uvek biti, zatičemo ih kao ostatke nekih nestalih ljudi, zajednica, civilizacija, a *dobra* treba izgrađivati/oblikovati. Istoričari ukazuju na paralelne sličnosti *arhiva* i *arhiv*. Prvi je delovodni skup svih pisanih akata nastalih u socijalnoj (uglavnom obligatnoj) komunikaciji, a drugi je njihov sistematizovani registar po kriterijumu neutralnog dokumentovanja proteklih aktivnosti. Arhivsko dokumentovanje počiva na ideološki, ekonomski i estetski bezinteresnoj selekciji nosilaca pamćenja. Kako su to jednako i svojstva nauke, onda se govori o naučno pouzdanoj proizvodnji dokumenata. U tom kriterijumu odražava se potreba društva (njegovih članova) za održavanjem sistema vrednosti na snazi dokumenta. Ono što je po definiciji vrednosni sistem izlazi iz uskog interesa nauke i ulazi u javni prostor. U javnom prostoru pojedinci deluju kao nosioci nataloženog iskustva koje stvara kolektivne obrasce ponašanja. Svako *taloženje iskustva* odslikava izgradnju ličnosti, tj. jedan proces učenja u zajednici u kome se nova ličnost oblikuje ugledanjem i preispitivanjem društvenih obrazaca. Svako učenje, dakle, počiva na (kulturi) pamćenju, a svaki mehanizam socijalizacije kroz učenje, kao

*sine qua non*, moguće je samo zato što je svako okupljanje oko zajedničkih potreba legitimni mehanizam proizvodnje javnog dobra. U tom društvenom procesu zajednica raspodeljuje odgovornosti za održavanje sistema vrednosti. Odgovornosti su u toj raspodeli veće za one kojima je dodeljena obaveza njihovog negovanja kroz unapređenje sistematskog delovanja u skladu sa razvojem ljudske znatiželje, na primer u naučnim i strateški sličnim zajednicama. Ništa manja odgovornost ne pada ni onima zaduženim za transformacije koje pruzrokuju tehnološke novine. U ovom slučaju je *ono* konkretno klasifikovano kao *arhivsko dobro*.

U potonjem smislu *dodeljivanja* sadržan je prvi preduslov javnog dobra – poslanstvo. Identifikujemo ga sa onim shvatanjem profesionalca koji je ne samo sposoban već i slobodan da u neprekidnom procesu socijalne verifikacije investira svoju kritičku svest o nenarušivosti principa dokumentovane svedočanstvenosti. Svako *proizvođenje* prošlosti (tvornice nostalgije) onoliko je vredno u jednoj atraktivnoj interpretaciji, na primer, koliko je dokumentovano, tj. *utaloženo* u nekom od mehanizama kolektivne memorije (biblioteke, arhivi, muzeji).

Da i u doslovnom smislu pamćenje ne pređe u otužni talog, iskustva arhiviranja su u XX veku proizvela posebne sisteme njegove efikasne upotrebe – TEZAUROUSE. Ovaj je u funkciji (bezinteresnog) očuvanja TROČLANE STRUKTURE KULTURNOG svedočanstva (dokumenta): kulturno dobro počiva na a) jedinstvenoj potrebi čoveka za simboličkom razmenom u svetu (zbog toga su neke *stvari* za nas *belezi vremena* – dokumenti, muzealije, spomenici); b) potrebi bezinteresnog – naučnog unapređenja *stvari* u dokument; c) potrebi (slobodnog) čoveka da troši svoje iskustvo u svakodnevnoj upotrebi. Suštinski, čovek svoj svet simboličke razmene može opravdati samo u kulturnoj razmeni – tj. upotrebi naučne, bezinteresne činjenice u unapređenju sopstvenog života. U praktičnom smislu ovo je artikulisano kao tri stepena dokumentovanja muzealnosti: 1. primarno ili dokumentovanje opravdanja selekcije muzealnosti (svedočanstvene vrednosti) – strukture kulturnog konteksta; 2. sekundarno ili bazično disciplinarno utemeljenje svojstava dokumentarnosti – svih morfološki iscrpivih opisa, kao i dešifrovanje mogućih identitetskih odlika; 3. napokon, dokumentovanje svih procesa muzealizacije, tj. dokumentovanje dokumentovanja muzealnosti (pohranjivanje i čuvanje dokumentacije).

U opravdanju ovog tehnološkog doprinosa nalazi se i druga odrednica javnog dobra – dostupnost. Kako smo na početku već istakli, pitanje dostupnosti uzrokuje i pitanje *informatizacije* i njenog smisla. Pitanju smisla je potrebno najpre udovoljiti: čemu sve to?, tj. može li se živeti komfornije u zaboravu ako zaoštrimo pitanje javnog dobra? Najpre ono što je *dobro*, po svom, dakako, nasleđivanom sadržaju bivalo je kroz zapamćenu istoriju poistovećivano sa jednim od njegovih svojstava, upravo prema potrebi društva. *Dobro* je opšti problem u

etičkom određenju i vrednovanju ljudskog delovanja. *Ideal dobra*, kao vrhovni smisao života, istorijski je podrazumevao kad sreću, kad uživanje, a kad korist. Ovu sistematizaciju u etici uzimamo kao izvor za naukovanje geneze baštinjenja na sledeći način:

**Tabela 1:** Geneza *dobra* kao predmeta heritologije

Nauka baštinjenja	Uobičajena stvarnost	Etika <i>dobra</i>	Praksa baštinjenja
analiza motiva zbiranja dobara	priroda pobude za zbiranjem	<i>dobro</i> u povesti	zbiranje u povesti
ja – svet subjekta	nagoni i potrebe individue	sreća (eudemonizam)	zbirka kao sopstvo (skrivnice, kabineti, studiola)
ja pred mi (u slici sveta)	drugi kao nadomeštanje subjekta	uživanje (hedonizam)	zbirka kao slika sebe (galerije, vrtovi, lapidarijumi...)
mi kao ja – ja u slici (našeg) sveta	kolektivne memorije	korist (utilitarizam)	zbirka kao graditelj nacionalnog repozitorijuma

U prikazanoj genezi istorijskih oblika baštinjenja istaknuto je ono što je u prirodi čoveka kao slobodnog bića, potreba za iskazivanjem svog doživljaja sveta, svoje istine. To je ono što je stalni pokretač čovekovog ojavljivanja, njegovog prikazivanja pred zajednicom, koliko i zakrivanja u njoj. Branko Despot je tu narav doveo do dramatičnog specifikuma humaniteta u sledećem zapisu:

Ono *mi* u nama javlja se, izlazi na javu, pojavljuje se i objavljuje sebe na različite načine i na različitim razinama. Mi jest kao društvo i društvena udruženja, kao narod i zajednica naroda, kao država i savez država, kao vjerska zajednica i kao tolerantni religiozitet. Ali mi jest, na višoj i ujedno dubljoj razini, kao mnoštvo jezika. Jezici, kaže se, razdvajaju. Ono što, tome nasuprot, gradi mostove i nadilazi razlike jest uzajamno razumijevanje. Razumijevanje pak počiva na zajedničkom jeziku, koji nije ni živ ni mrtav, nego je jedan i jedinstveni jezik kojim govori ono razumljivo u svojoj razumljivosti, naime razum sam ili smisao stvari. Razumijevanje je, dalje, osebnino mišljenje. Mišljenje, kada odista jest mišljenje, nije niti tvoje niti moje, a niti naše u vulgarnome značenju onoga *mi*. Mišljenje može biti i razumijevanje i umovanje i znanstveno mišljenje, ono može biti spekulativno, a može biti i naivno — ali, kada odista misliš, uključuješ se u zajednicu istinskog mišljenja ili mišljenja istine, u

kojoj zajednici nisi više *mi* niti kao društvo, niti kao narod, niti kao sljedbenik, niti uopće više ovo ili ono kao fragment čovjeka nego u toj zajednici ili u tome mi mišljenja jesi samo i jedino kao čovjek. (Despot, 1991, str. 7–8)

Ako je svako objavljivanje dobra uvek i samo potvrda prisustva čoveka kao individue koja objedinjuje ideju i mišljeno delo dobra u zajednici, onda je program očuvanja vrednosti javnog dobra usmeren ka negovanju čoveka. Ono *ja* koje će postati *tvoračko mi* može oformiti samo jedinstveno (opšteobrazovno) odgajanje baštinika za otkrivanje i negovanje vrednosti nasleđivanja. Samo pojedinac koji je i sopstvenik potrebe za negovanjem pamćenja može biti celovita ličnost za perspektivno profesionalno stasavanje u poslovima standardne brige o baštinskom telu jedne kulture (dosledno strukovno obrazovanje za baštinjenje). Samo zajednica sa objavljenim potrebama za negovanjem sopstvenog pamćenja biće spremna da uvek i svako *baštinjenje* omerava ponovnim promišljanjem sopstvenog *baštinjenja* (u zajednici slobodnog, kritičkog mišljenja – na univerzitetu). U skladu sa prikazom u Tabeli 1, mogli bi se reći da se (1) razvoj individualnih potreba ne sme zagušiti u opštem obrazovanju, da se (2) objavljivanje „svoje“ slike sveta mora podržati profesionalnim obrazovanjem te da se (3) baštinjenje mora osloboditi doktrinarnih stega (slobodnomisleće baštinovanje), odnosno da u slobodnoj akademskoj zajednici omogućiti neprekidnu diskusiju o ideji javnog dobra.

Ili, kako bi to, još jednom slikovito rekao B. Despot:

Nužnost univerziteta leži u naravi čovjeka. Iz toga pak, kako čovjek sebe u svome biti vidi, proizlazi ustrojstvo univerziteta i njegova svrha.

Ukoliko čovjek, kao usmrtivo živo biće, dok je živ, jest neumrlo i nerođeno čovještvo, utoliko on jest sloboda, koju niti smrt niti rođenje ne dotiču. Ta živa, usmrtiva, ali, niti mrtva niti besmrtna, u rođenome nerođena sloboda jest čovještvo u čovjeku. Tu slobodu čovjek nema kao svojstvo volje ili mišljenja. Tu slobodu čovjek ne može izboriti. Čovjek jest ta sloboda. Bez nje bi čovjek bio Zemlja, Zvijer ili Bog.

Kao ta sloboda i iz te slobode, čovjek traži sebe sama i sebe u svemu i sve u sebi. Ono što traži u sebi i u svemu jest istina.

U toj potrazi živog čovjeka za istinom svoga čovještva korijeni se moguće zajedništvo tražitelja istine u slobodi. Nosi li takovo zajedništvo ime univerzitet, onda se može reći da je naravi čovjeka

odgovarajuće ustrojstvo univerziteta istinska aristokracija, vladavina onog najboljeg, a to je tu sloboda.

Zajedništvo tražitelja istine pod gospodstvom slobode bitni je karakter univerziteta. (Despot, 1991, str. 16)

### Javnost *dobra* kao garant prava na obrazovanje

U navedenom smislu, nevažno je pitanje vlasništva kada se nalazimo na prostoru javnog dobra. I državne i privatne ustanove odgovaraju na iste zahteve objektivnog dokumentovanja, stvaranja optimalnih uslova dostupnosti i podsticanje edukativne i *kulturne* upotrebe kulturnih trezora. Svi oblici izbegavanja ovih zahteva imaju jedan drugi legitimitet. Najčešće su to legitimiteti *kolekcija vrednih predmeta*, među kojima, dakako, nije teško identifikovati i neka svojstva kulturnog *dobra*, ali je njihov primarni motiv nastanka prestiž. Kao socijalna kategorija, legitimitet lavira između psiholoških učinaka velike materijalne vrednosti kolekcije i vlasništva nad teško merljivim apstraktnim vrednostima starine, retkosti ili umetnine. No, postupak proglašenja u visokoj kategoriji javnog kulturnog dobra obavezuje svakog vlasnika na standardnu proceduru zaštite i upotrebe kulturnog kao *javnog* dobra (Zakon o kulturnim dobrima, 1994: član 2; član 31).

U ovom potonjem smislu ukazali bismo na dve ovovremene tendencije koje ne uzimaju kao bitan element privatnu ili državnu inicijativu u nastanku, razvoju i korišćenju muzejskih zbirki, već računaju upravo na javnost *opšteg dobra*. Model muzeja kao *mesta dobre razmene* odgovara kapitalističkom modelu samoodrživosti i može da proizvede minimiziranje javnog interesa u smislu dostupnosti (često se zamenjuje *milosrdnošću*), ali je neizbežna profitna determinacija. Po tom modelu funkcionišu i mnoge ustanove koje su u (ideološkoj) transformaciji izgubile *primarno*, prvobitno, kulturno poslanstvo javnog trezora: dobar primer su muzeji KGB-a (*Комитет государственной безопасности* [rus.] – *Komitet državne bezbednosti* [prev.], koji su, zbog impresivnih količina ubojnih sredstava, pretvoreni u zabavne parkove za zahtevne i *pucački* odnegovane brojne turiste iz Sjedinjenih Američkih Država (SAD) (Unfried, 1992).

Drugi oblik prilagođavanja trezora javnih dobara su transformacije koje oživljavaju model (zakasnelih ili reanimiranih) identiteta: *muzej*, obično se ublažava sledećim, *kao mesto interaktivnog stvaranja identiteta*. Tom vrstom ideološkog prostituisanja su često u tranzicijskoj raspodeli *pomoći* ucenjeni stari kulturni trezori koji su, ne bez muke odricanja, ugrađivani u temelje malih državnih zajednica .



Na taj način grubo isplivava osnovni problem koji se može javiti u svakoj akademizaciji: odgajanje baštinika kao slobodnih tragača za čovekom i njegovom istinom. Evo kako stoji taj oprez:

Javno dobro ima (traži) svoju sliku u TEZAURUSU. Ovo znači da prvo moramo proizvesti uslove baštinjenja (sistematsko kulturno, ne usko naučno, dokumentovanje prošlih stvarnosti), pa onda očekivati konsenzus oko proširenja kulturnog tezaurusa. Uslovi baštinjenja su: STANDARDIZOVANJE selektovanja, dokumentovanja i interpretacije svedočanstvenosti.

U metodičkom smislu, standardizovane su procedure *identifikacije*, *deskripcije* i *geneza dokumentovanja* muzealnosti. Prvom se dokumentuje *pretpostavka* kulturne potrebe da *nešto sačuvamo* – selektujemo uvek nešto što potvrđuje memorijsku potrebu (misao, proces), a ne neku *stvar*. Drugom se odgovara na standardnu proceduru *proizvođenja strukture dokumentovanja* memorijskih procesa. U praksi je to: opis *materijala* i opis *značenja*. Opisi se daju standardizovati i jedino tako učestvuju u stvaranju javnih tezaurusa: pretvaranju *mrtvih* trezora stvari u *žive* TEZAURUSE jezički, te u MISAO, tj. u FREKVENTNU KULTURNU UPOTREBU SIMBOLIČKIH NOSILACA VREDNOSTI ISKUSTVA. Trećom se odgovara na socijalni zahtev: kako sačuvati *iskustvo*? (Tabela 2).

Ako se kao posledica interpretacije ne javi javna potvrda vrednosti *za sve*, neće biti ni proširenja *tezaurusa*, pa je time i inventar baštine degradiran na nivo *inventara (potrošnih) sredstava*. No, u svakom slučaju, moramo uzeti nešto što je, makar usko specijalizovan opis, radi naučnog objašnjenja, koji počiva na *formalnoj* analizi, a ova ima svoj tehnički i svoj *idejni* deo. Materija (A) i stvaranje oblika (B) pripadaju materijalnom delu, a stvaranje značenja (C) nematerijalnom delu sadržaja baštinskog predmeta.

**Tabela 2:** Pristupi predmetu baštinjenja kao javnom dobru

<i>heritološki, integrišući pristup</i>	<i>naučno parcijalni, jedinačni, pristup</i>
izvor (A)	materija (A)
svedočanstvenost (B)	stvaranje oblika (B)
smisao (C)	„idejni” sadržaj (C)
„heterotopije“ u čitanju: „relativnost mesta i vremena“	naučni <sup>o</sup> tezaurusi, po klasifikaciji disciplinarnog znanja
identitetske upotrebe baštine kao javnog dobra – <i>svedočanstvenost identiteta</i>	instrumentalizacije institucije baštinjenja (npr., <i>muzej kao škola</i> )

geneza dobra kao:	„pamćenje materijala“ (odgovara stvaranju muzejskih fondova) ili pamćenje ideje (odgovara stvaranju kolektivnih identiteta) ili pamćenje „životnog ritma“ (odgovara oslobađanju privatnih identita i <i>vaninstitucionalnom</i> baštinjenju)
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Ovaj pristup *kolektivnim memorijama* kao ishodištima savremenog shvaćanja *javnog dobra* podrazumeva odgovarajuću strategiju odgajanja baštinika i razvoja ideje baštinjenja.

Da bi bolje odredili uslove za univerzitet baštine, daćemo bliže socijalne odrednice nasleđa i baštinjenja.

### *Shvaćanje nasleđa kao socijalne vrednosti*

Uobičajeno shvaćanje spomenika kulture zapravo je jedna od metafora trajnosti, metafora putovanja u prošlost radi trasiranja puta u budućnost. U tom *zadavanju egzistencijalne perspektive* presuđuje vlasnička nadmenost. Naime, *starudija* koja se trezorira redovno nosi tumačenje sopstveničke važnosti – bez našeg svojatanja ona tone u beslovesnost, sa našom brigom progovara o našoj veličini. No, motiv reprezentovanja ne počiva na golom posedništvu. Posedništvo kao snažan pokretač metaforičkog procesa može se i jaloviti ako ne počiva na svojstvima autonomne svedočanstvenosti kao svojoj osnovnoj vrednosti, ako se izvrgava u epigone ili ako se zanese u fetiš produkciju. Baština jeste ime institucije (*patrimonium*), ali, kao etičkog obeležja koje obavezuje na društvene konvencije, sinonim je memorijske potentnosti i garant jakog životnog ritma. Izvorno rimska građanska tvorevina, baština institucionalno i danas funkcioniše kao temelj socijalnog opstanka, etički je artikulirana u konvencijama i kodeksima, memorijski je *sine qua non*, dok mu životni ritam, po pravilu ljudske destrukcije, ne uvažavaju nagle, osiono tehnološke i neutažive socijalno-ekonomske promene. Rasprava o socijalizaciji nasleđa kao procesa u kome se na jednoj pravnoj instituciji (*patrimonium*) zasniva jedan etički sistem odgovara na zahtev da se uređenjem baštinskog korpusa jedne zajednice potvrdi opšti sistem humanističkih vrednosti na delu (Bulatović, 2005, str. 10).

*Socijalizacija baštinjenja* (socijalna verifikacija vrednosti) ima tri manifestne forme: društvenu, pravnu i tehničku. Prva se ostvaruje negovanjem sećanja, tj. odgojnim i obrazovnim održavanjem potrebe za očuvanjem i korišćenjem resursa pamćenja. Druga podrazumeva institucionalizaciju baštinjenja u okviru uređenja društvene i državne zajednice. Treća se odnosi na materijalizaciju baštinskog trezora, tj. na dokumentovanje muzealizovanog nasleđa i tehnologiju odr-

žanja (preventivnog, kurativnog, tehničkog) korpusa baštine (Marasović, 1985). Zbog toga, strategija kompetitivnosti mora da se osloni na temeljito planirane programe obrazovanja za baštinu i baštinare. Ovi prvi su već obuhvaćeni izmjenjenim programima obaveznog opšteg obrazovanja, a drugi su prepušteni slučaju. Takođe je sasvim nekontrolisan uticaj masovnih medija na profilisanje kulturnih potreba i razvoja interesovanja za sopstvenu baštinu. U svakom slučaju, potrebno je planirati unošenje programskih sadržaja O PRIRODI, VREDNOSTI I NAČINU KORIŠĆENJA BAŠTINE u sve planove specijalističkih profila srednjeg i visokog obrazovanja jer nema te oblasti stvarnosti koja ne referira na svoje iskustvo, koja se ne može osloniti na sopstvenu baštinu. Nauk o prepoznavanju, čitanju, korišćenju i negovanju baštine jednako može biti dragocen i moreplovcu, i turističkom menadžeru, i proizvođaču zdrave hrane i budućoj pijanistkinji. Poseban problem, i u tom smislu strateški zahtev, jeste planiranje kadrova koji će neposredno raditi u usko specijalizovanim delatnostima trezoriranja i korišćenja baštine. Nije bez značaja ni to da bi se na taj način mogao lakše ostvariti pozitivan uticaj na druge poslenike kulture i humanistički intelektualni sloj, čime bi se stvorila šira društvena masa u borbi protiv baštinske devastacije. Naravno da je neophodno da se jasnije postavi uloga nauke i u ovoj oblasti delovanja jer ćemo inače bez njene snage samo prepisivati tuđe modele, što ne mora da bude loše, ali jeste zavisnički. Odnosno, uvek bismo morali da imamo neki broj *naših* koji bi bili kadri (znanjem i moralom nepodmitljivi) da procene koji model nije loš za preuzimanje, a, sa druge strane, da imamo obrazovane i naučno kadre da primene, adaptiraju i unaprede modele baštinjenja i u zaštiti, tj. čistim aplikacijama nauke i tehnologije, i u filozofiji baštinjenja, njegovom smislu i socijalnom opravdanju, njegovom vlasništvu, tj. javnosti i privatnosti baštinskih trezora, pa onda i obrazovanju na takvoj filozofiji. U suprotnom, ostaje opasnost da se može stvoriti izraziti elitizam na prednosti *vlasnika istine*, inih sudija ispravnosti i probranih korisnika baštinskih trezora, kao i izvršilaca kolektivne volje.

**Tabela 3:** Strategija obrazovanja baštinika

Obrazovni sadržaj	Mesto i nivo obrazovanja	Strateški period
Nauk o baštini	u obaveznom obrazovanju	<i>postoji</i> , samo ga treba unaprediti
Nauk o baštini i baštinjenju	u specijalističkom obrazovanju (uslužne delatnosti)	treba u <i>kratkoročnom</i> periodu pažljivo uraditi program
Baština kao humanističko nasleđe	u humanističkom obrazovanju (gimnazije)	<i>kratkoročno</i> , evaluirati i po potrebi dopuniti

Baštinski profili	u visokoškolskim programima (Filozofski fakultet, akademije...)	<i>srednjoročno</i> , obavezna poduka o trezoriranju, interpretaciji i korišćenju
Naukovanje za baštinare	u novim specijalističkim programima	<i>dugoročno</i> , pri postojećim visokoškolskim ustanovama ili u novoj ustanovi

Ovaj poslednji oblik obrazovanja obezbeđivao bi jedan opšti profil heritologa, muzeologa koji bi imao i svoju dodatnu misiju (kroz naučno osposobljavanje i habilitaciju) u širenju disciplinarnih znanja u druge obrazovne programe, pre svega one koji bi obezbedili takozvane simbiotičke profile stručnjaka, one koji bi u održivom razvoju, organskoj proizvodnji, na primer, bili dobri i zadovoljni baštiniči sopstvene tradicije i najbolji čuvari njenih vrednosti.

U skladu sa iznetim razlozima za opravdanost *studija baštine*, sistematsko univerzitetsko obrazovanje za profesije baštinjenja počivalo bi, sa jedne strane, na održanim objedinjenim humanističkim studijama, makar formalno pod krovom filozofskih studija, te na uzrastanju muzeologije i zaštite nasleđa sa nivoa poduke za doktrinarnu praksu na nivo holističke hermeneutičke discipline. Kako se da videti iz strategije koju smo ustanovili (<https://sites.google.com/site/heritagefbg/seminar-za-muzeologiju-i-heritologiju/razvoj-univerzitetskih-programa-za-bastinske-profile>), program studija baštine se formira kao **komplementaran** programima osnovnih studija, pre svega tradicionalnih humanističkih disciplina koje se izučavaju na Filozofskom fakultetu u Beogradu i njemu srodnim, ali i kao praktičan dodatak korpusu znanja za osnovne i primenjene nauke koje se izučavaju na prirodoslovnim, tehničkim i bio-medicinskim fakultetima i umetničkim akademijama. Projektovana komplementarnost je viđena kao opravdan vid nove harmonizacije humanističke obrazovne paradigme u savremenim uslovima. Ona se pre svega odnosi na uvažavanje novih kauzaliteta koji se rađaju između upadljivih *transformacija tradicionalnih disciplina znanja, tehnološki unapređenih veština* i doktrinarnog upravljanja zakonitostima životnih i radnih procesa, kako ga sa pozicije metadiscipline nameće *menadžment* (više u: Bulatović, 2013). Uzimamo da je vizija neohumanističkog oblikovanja baštinika legitimna najpre zbog toga što je branimo jednom filozofijom *dobra*, prirodnog i kulturnog, koja objedinjuje sve znatiželje oko pojma *svedočanstva* kao zajedničkog entiteta. Svedočanstvo, kao svoj primarni predmet, imaju već istorija, kao jedna stara, i informatologija, kao jedna od najnovijih nauka. Jedna ga artikuliše kao dokument ili ishodište objašnjenja, druga ga bezinteresno opisuje kao izvoriste značenja. Ni prvu ni drugu ne okupira sam proces *svedočenja*. A svedočanstvenost je nasledna obaveznost i uzima se kao temeljni predmet heritologije. *Patrimonium* (starina) jeste pre svega pravo i obaveza očuvanja stečenog. Upravo proces *baštinjenja* sa punim opravdanjem može da se artikuliše u okrilju, za sada očuvanog (makar formalnog)

jedinstva filozofsko-istorijskih studija, te u tom smislu program studija nasleđa koji formiramo i treba da bude *matičan* za sve uže specijalnosti (poput etike u medicinskoj i svakoj drugoj praksi).

Isto je uporište i holističkom pristupu u razumevanju baštinjenja kao obrazovne oblasti. Zajedničkim jezgrom studija obezbeđen je **jedinstven pristup** (jedinstvenom) **nasleđu** u svim oblastima istraživanja i ljudske prakse, te na taj način je i omogućena efikasnija specijalizacija za sve oblike očuvanja različitih nosilaca svedočanstvenosti i njene efikasne i blagovremene naučne, obrazovne i kulturne upotrebe.

Što se primarnog cilja tiče, strategija ističe stvaranje opšteg profila **baštinstvenika** (heritologa) neophodnog za koordinaciju strategija opšteg razvoja kulture pamćenja, kao i omogućavanje, pre svega, niza **simbiotičkih profila** za očuvanje, negovanje i korišćenje kulturnog, duhovnog, nematerijalnog, prirodnog, ekološkog, ekonomskog, naučnog, tehnološkog, genetskog i inog nasleđa. U tom smislu, Filozofski fakultet bi obavljao **bazične studija baštine** (heritologija i muzeologija), kao što bi i dalje osposobljavao kadrove za specijalnosti u delatnostima zaštite i upotrebe kulturnog, duhovnog i nematerijalnog nasleđa. Razvoj programa za druge vrste baštine obavljao bi se u bliskoj saradnji sa naučno-istraživačkim i obrazovnim matičnim ustanovama. Takođe, **specijalnosti za posebne oblike zaštite i upotrebe baštinskih vrednosti**, kao što su *pravna* zaštita, *tehnologije* zaštite nosilaca nasleđa, *bezbednosti*, te *promovisanja* baštine, razvijale bi se na njima matičnim fakultetima. Razvoj programa **za druge vrste baštine** (*prirodne, tehničke, industrijske*) obavljao bi se u bliskoj saradnji sa, za njih, matičnim naučno-istraživačkim i obrazovnim ustanovama (više u: Bulatović, 2014).

Iako se u aktuelnoj disharmoniji koja postoji između univerziteta i potreba kapitala ozbiljno odmiče u dezintegracije humanističkog obrazovanja, ne može se potvrditi da je model humanističkog odgajanja zastareo. Kako smo u ovoj raspravi isticali, pre bi se moglo sa puno opravdanja tvrditi da je izvor socijalnih disharmonija u zastarelosti institucije univerziteta. Ako bismo redefinisali univerzitet kao zajednicu negovanja kalokagatije u smislu nove generativne matrice, moguće je zamisliti i novi nepotkupljivi socijalni sporazum. On bi bio nov u onom predefinisiranju predmeta sveta, pomerenih ključnih tačaka objašnjenja prirode (materije, života) i u tom smislu novih ključeva harmoničnog razumevanja društvene stvarnosti. U tom kauzalitetu, i odgajanje članova zajednice za rešavanje svih životno aktuelnih problema, pa i disharmonije sa doktrinom *kapitala*, mogao bi stvoriti društva koja su osetljiva na neravnoteže u humanističkom razvoju i sposobna da preduprede kritične disbalanse provocirane različitim tehnološkim, kapitalnim ili kulturno rasterećenim neutaživostima. Značaj odgajanja za stabilnu kulturu

pamćenja može izgledati predimenzioniran u vremenu uzavrelih kriza, ali se ne može poreći integrativni potencijal koji ova nova paradigma ima u rehabilitaciji pojedinca kao aktivnog činioca zajednice. A on to ne može biti, ne da nam pamćenje da ćutimo, bez humanističkog obrazovanja.

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## The Heritage Studies as the Foundation for the Preservation of Humanities<sup>7</sup>

**Abstract:** This paper will discuss the crisis of knowledge as a humanistic problem of understanding the world. This relation will be set as a key for explanation for the so-called revolution in science. The frequency of new research paradigms as characteristic of science and philosophy since the mid- twentieth century initiates discussion on models of rational explanations of the world and models of their understanding and acceptance. In this newly opened space different disciplinary experiences whose heritage is explainable by *ars memorativa* are encountered. Heritology, as a theory of remembering, performs with historically silenced mode of knowledge integrity of the world, which is by its representation offered to discursive explanation as complementary. Exactly at this subordination we see a strong case of transdisciplinarity as a hope for the progress of rational knowledge. The contemporary concept of heritage overlooks the humanistic origin of the discipline that is derived from the antique phrase *kalokagathia* (καλός και αγαθός, in the philosophy of German Idealism *καλοκαγαθία* represents the epitome of good physical and spiritual education, germ. *Bildung*). Beautiful is that which is good. In its rich educational continuance good was perceived sometimes as luck (in discovery), other times as indulgence (in knowledge), and yet other times as benefit (in acting); but each time it was something characteristic for the zeitgeist that determined the idea of the university of that time. If we look at the common denominator of the concepts of the cultural good and the university, it would obviously be the public sphere. The public quality of a cultural good is the value that has an immense influence on all modern managerial models of evasion of common good or, in other words, of favouring of the success/competiveness model, derived from the doctrine of liberal capitalism. How the contemporary concept of heritage, crucified, in our various growing up backgrounds, between *lapot* (senicide) and the shopping mall, is saved through the university programme, shall be presented by the example of the heritage studies (graduate and postgraduate) of the Seminar and the Centre for Museology and Heritology of the Faculty of Philosophy in Belgrade. It shall be presented how the continuance of humanistic ideals of any community depends on preservation of public availability of cultural goods and accessibility of education embodied in the beauty of knowledge of each individual.

**Key words:** Heritage, patrimonium, Crisis of Science, Humanities, University, Cultural Good, Heritology.

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## Kvalitet ljudskog potencijala i ekonomski razvoj na nacionalnom nivou

**Apstrakt:** U današnje vreme kvalitet ljudskog potencijala se prepoznaje kao sastavni deo nacionalnog bogatstva i vodeća snaga ekonomskog i svekolikog napretka. Reč je o složenom i dinamičnom fenomenu koji ima i sadašnjost i budućnost, koje valja uzeti u obzir prilikom sagledavanja svih elemenata ljudskog potencijala i osmišljavanja i razvijanja najefikasnijih obrazovnih strategija za njihovo poboljšanje i kontinuirani razvoj. Na osnovu izvesnog uvida u demografsku komponentu ljudskog potencijala i pismenost odraslog stanovništva i njegovu ukupnu obrazovnu strukturu sagledanu i iz aspekta rezultata učenika iz Srbije na PISA testovima kao i TIMSS istraživanjima, moglo bi se zaključiti da se u ova dva „resursa“ ne nalazi očekivani potencijal ekonomskog i nacionalnog razvoja zemlje. Još preciznije, demografski potencijal Srbije je pre kočnica nego faktor razvoja, dok obrazovanje i posebno njegov kvalitet podrazumevaju inovacije i dugoročne mere i podsticaje kako bi se osnažio i ubrzao ekonomski i ukupni nacionalni razvoj.

**Ključne reči:** kvalitet ljudskog potencijala; demografski potencijal; obrazovne strategije; obrazovni potencijal; nacionalni razvoj; socijalno-ekonomski razvoj.

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## Uvod

Često citirana rečenica Alfreda Maršala „da je od svih vrsta kapitala najvrednije investiranje u ljudska bića“ (v. Teece, 2012, str. 528, i dr.) neosporno potvrđuje da je ovaj poznati ekonomista među prvima prepoznao važnost ljudskog potencijala, odnosno sposobnosti, znanja i kompetencija ljudi za ukupni ekonomski rast i razvoj. No, i pored takvog saznanja, ne bi valjalo zanemariti da je Teodor Šulc, početkom 1980-ih godina, još šire obrazložio „novonastalu realnost“, koja se sve do današnjih dana produbljeno analizira iz različitih perspektiva u svetskoj ekonomskoj i srodnoj literaturi (v. na primer: Burton-Jones and Spender, 2012, Корчагин, 2005; Цыренова, 2006, i dr.). Šulc je 1981. godine u knjizi *Investing in People (Ulaganje u ljude)*, koja je prevedena i objavljena i u Zagrebu (1985), najšire predstavio svoju viziju ekonomskog napretka, u kojoj su ključnu ulogu imali ljudi, odnosno rast njihovih stečenih sposobnosti:

Glavni je pravac moga dokazivanja da ulaganje u kvalitet stanovništva i u znanje u velikoj meri određuje buduće izgledе čovečanstva. Kada se ta ulaganja uzmu u obzir, zle slutnje o iscrpljivanju fizičkih resursa zemlje moraju se odbaciti. Izrazito povoljno postignuće mnogih siromašnih zemalja u poslednjim decenijama je njihovo ulaganje u kvalitet stanovništva. (Schultz, 1985, p. 9)

Ova Šulcova misao nedvosmisleno potvrđuje da se on suštinski bavi različitim aspektima ljudskog potencijala na nacionalnom nivou, od kojih mnogi nisu ni kasnije analizirani, naročito u ekonometrijskim interpretacijama ljudskog kapitala kao razvojnog resursa (v. Kulić, 2011). Na takvim pretpostavkama je lakše mogao da zaključi da su ljudi važan deo nacionalnog bogatstva i otvori novu stranicu u ispitivanju složenih odnosa između osnovnih faktora proizvodnje i, posebno, mesta i uloge ljudskog potencijala u tom procesu, ali i u ukupnom razvoju. Šulc uočava složenost ljudskog potencijala koja se ne ogleda samo u kvalitetu radne snage, odnosno njenom obrazovanju nego i u „kvalitetu stanovništva“, tj. njegovoj demografskoj strukturi koju savremeni autori (Заславская, 2004, Поветьев, 2009, i dr.), ali i odgovarajuće organizacije i agencije UN (UNDP), vide kao jedan od tri bitna pokazatelja (uz obrazovanje i bruto nacionalni proizvod) nivoa nacionalnog razvoja. Takvo saznanje, kao i noviji statistički podaci, koje ćemo nešto kasnije šire predstaviti, omogućuju izvestan uvid u sadašnje stanje ljudskog potencijala u Republici Srbiji i njegove okvirne razvojne tokove.

## Poreklo i značenje termina

Izrazi „potencijal“ i naročito „ljudski potencijal“ odnedavno su češće u upotrebi u profesionalnim izvorima sa područja ekonomije i srodnih disciplina. Indikativno je da taj termin uglavnom ne nalazimo u izvorima na engleskom jeziku (v. na primer: Boxall, Purgcell, Wright, ed. 2010; Burton-Jones, Spender, ed. 2012, Sutherland and Canwell, 2004; Scott and Marshall, 2009, i dr.), kao i u većini specijalizovanih rečnika ljudskih resursa na francuskom jeziku (Igalens, 2008; Herrbach, Mignonac, Richebé, 2009, i sl.). Ali, iz jednog internetskog izvora na francuskom jeziku (<http://www.Oboulo.com>), odnosno sažetom tekstu A. Korali (A. Coralie, 2009) pod naslovom *Doprinosi upravljanju ljudskim potencijalima u preduzeću*, moguće je izvesti još neke zaključke. Tako autor „ljudske potencijale razume kao 'ljudske resurse', uz konstataciju da se prvi izraz u Francuskoj koristi desetak godina i odnosi na ljude koji su sposobni da se razvijaju vertikalno ili horizontalno, prateći promene u preduzeću“. Bez obzira na takvu operacionalizaciju ljudskih potencijala, Korali napominje da su ljudi uporedo sa finansijskom aktivom i proizvodnim i prirodnim resursima „osnovno bogatstvo svake zemlje“.

Skoro istovetno stanovište zastupa i Bahtijarević Šiber u knjizi *Menadžment ljudskih potencijala* (1999):

„Ljudski potencijali su ukupna znanja, vještine, sposobnosti, kreativne mogućnosti i odanost kojom raspolaže neka organizacija (ili društvo). To je ukupna intelektualna i psihička energija koju organizacija može angažovati na ostvarivanju ciljeva i razvoja poslovanja“ (str. 16).

To znači da i ovaj autor ljudske potencijale prvenstveno smešta u okvire preduzeća iako ne zapostavlja ni njihovu nešto širu dimenziju, odnosno širi društveni kontekst. No, na osnovu njene definicije ljudskih potencijala, kao i analize „personalne funkcije“ i „funkcije ljudskih potencijala“, lako je zaključiti da Bahtijarević Šiber u prvom planu ima ljudske potencijale – resurse preduzeća, što nije retkost ni u drugoj stručnoj literaturi sa ovog područja. Njeno je mišljenje, isto tako, da ljude, odnosno njihove potencijale valja posmatrati „u stalnom kretanju, na način koji istovremeno uključuje i sadašnjost i budućnost“ (str. 17).

Na taj aspekt potencijala ukazuje se u još jednom profesionalnom izvoru (Одегов, Руденко, 2011), u kome se navodi da taj koncept izražava jedinstvo prostornih i vremenskih karakteristika i koncentriše u sebi tri vrste odnosa: a)

**prošlost**, tj. sadrži u sebi celinu svojstava koja su akumulirana u procesu stvaranja potencijala, sa mogućim uticajem na njegovo funkcionisanje i razvoj, što je korespondentno „resursima“; b) **sadašnjost**, što znači da se potencijal može dovesti u vezu sa „praktičnom primenom i iskorišćavanjem raspoloživih sposobnosti“ (str. 298) i c) **budućnost**, odnosno orijentaciju na razvoj, iz čega proizilazi da u procesu radne delatnosti zaposleni ne ostvaruje samo svoje postojeće sposobnosti nego osvaja i nova znanja, veštine i kompetencije.

Više ruskih autora sa područja ekonomike i sociologije rada i srodnih disciplina (Генкин, 2007; Заславская, 2004; Лукашевич, 2012; Меламедова, 2008; Одегов, Руденко, 2011; Поветьев, 2009; Трунин, 2009. i dr.) bavilo se ljudskim potencijalom iz različitih perspektiva i posebno iz aspekta kvaliteta radne snage. Odegov i Rudenko napominju da se termini „radna snaga“, „radni potencijal“, „radni resursi“, „ljudski kapital“ i „personal firme“, koji su međusobno tesno povezani u svetskoj ekonomskoj literaturi, koriste da bi se što bolje izrazio „ličnosni faktor proizvodnje“ (Одегов, Руденко, 2011, str. 293). To što većina ovih autora u centru svoje pažnje češće ima „radni potencijal“ u odnosu na „ljudski potencijal“ ne predstavlja veliku manjkavost, tim pre što je reč o veoma korespondentnim pojmovima. Neki od njih (Кибанова, 2005) navode da je izraz „radni potencijal“ širi i dublji od termina „radni resurs“ jer je bolji pokazatelj „ličnosnog faktora proizvodnje“. Istovremeno, Melamedova (2008) zapaža da je termin „potencijal“ uveden u upotrebu početkom dvadeset prvog veka i da, bez obzira na to o kom je potencijalu reč (ekonomskom, proizvodnom, radnom i sl.), sadrži „u sebi sveukupnu sabirajuću karakteristiku resursa povezanu sa mestom i vremenom“ (str. 11). Reč je takođe o resursima koji mogu biti ispoljeni, odnosno o „mogućnostima određenog lica, grupe lica, društva u konkretnoj situaciji“ (str. 11).

I drugi ruski ekonomisti (Одегов, Руденко, 2011) na skoro istovetan način razumeju suštinu i smisao potencijala i dodaju da termini „resursi“ i „potencijal“ ne podrazumevaju „nesaglasnost“. Još preciznije, oni ukazuju na tri smera predstave o potencijalu:

1. Zagovornici prvog shvatanja vide u potencijalu „sveukupnost“ neophodnu radi funkcionisanja ili razvoja sistema različitih resursa, prvenstveno ekonomskih i neposredno povezanih sa funkcionisanjem proizvodnog sistema i osnaživanja tehnoloških promena;
2. U osnovi drugog shvatanja je predstava o potencijalu kao sistemu materijalnih i radnih faktora, tj. uslova koji omogućavaju postizanje ciljeva proizvodnje. Pritom se podrazumeva „sveukupnost opšteobrazovnih i profesionalno-kvalifikacionih karakteristika, koje, s obzirom

na istorijske, demografske, nacionalne i druge osobenosti, mogu biti iskorišćene u različitim sferama društvene proizvodnje“ (str. 296–297) i

3. Treće stanovište razmatra potencijal „kao sposobnost kompleksa resursa da reši pred njima postavljene zadatke“, odnosno „sveukupnost mogućnosti personala da ispuni bilo koji zadatak“ (str. 297).

S tim u vezi, neophodno je naglasiti da su u pravu autori (*Кибанова*, 2005; *Мазин*, 2009, i dr.) koji ističu da se u ekonomskoj nauci i praksi koriste mnogi pojmovi, kao na primer: „radni resursi“, „radna snaga“, „ljudski faktor“, „ljudski resursi“, „radni potencijal“, „ljudski potencijal“, „ljudski kapital“ i dr. koji imaju različit sadržaj i smisao. S obzirom na to, ovi pojmovi se često dopunjuju, a zajedničko im je to što otkrivaju „jednu od strana nosioca tih pojmova – čoveka“ (*Кибанова*, 2005, str. 56). Istovremeno, ne bi valjalo zanemariti već uočenu realnost u stručnoj literaturi da se neki od ovih pojmova shvataju kao sinonimi, kao na primer – ljudski resursi i ljudski potencijali. Još je češće identifikovanje ljudskog potencijala i ljudskog kapitala (*Корчагин*, 2005; *Мазин*, 2009, i dr.), što se može objasniti kompleksnošću i jednog i drugog pojma.

U stvari, ukoliko se ljudski kapital operacionalizuje kroz znanje, veštine i kompetencije i druge atribute koji su relevantni za njenu ekonomsku aktivnost, kao što je zaključio OECD 1998. godine (prema: *Nahapiet*, 2012), tada ova njegova „uža definicija“ ne pokriva suštinu i smisao ljudskog potencijala. Zato neki autori (*Корчагин*, 2005, i dr.) govore o užim i širim definicijama ljudskog kapitala, pri čemu shvatanje ljudskog kapitala u najširem smislu te reči podrazumeva ne samo „znanja, veštine i kompetencije osobe“ nego i mnoge druge njegove aspekte, od kojih T. Klark (*Clarke*, 2012), pozivajući se na „Forum za budućnost“, pominje zdravlje i blagostanje ljudi, znanje, veštinu i motivaciju. Ali, ljudski kapital je „multidimenzionalan konstrukt“ (*Nahapiet*, 2012), na šta je još davne 1971. godine ukazao T. Šulc (*Schultz*, 1971), koji, bez obzira na nešto veću posvećenost ulaganju u sve oblike obrazovanja, ne zapostavlja ni značaj ulaganja u zdravlje i kvalitet života. Na značaj i potrebu investicija u taj segment ljudskog kapitala, tj. zdravlje, dužinu i kvalitet života, posebno ukazuje G. Beker u predgovoru za *Oksfordski rečnik ljudskog kapitala* (v. *Burton-Jones*, *Spender*, 2012). Takav razvoj u tumačenju suštine i smisla ljudskog kapitala, odnosno nešto veći naglasak na taj njegov aspekt u odnosu na Teodora Šulca, Beker povezuje sa „pionirskom“ doktorskom disertacijom i tekstovima M. Grosmana, objavljivanim 1970-ih godina prošlog veka. U Grosmanovoj doktorskoj disertaciji i drugim radovima se naročito naglašava da su rast i opadanje u kvalitetu i kvantitetu života povezani sa obimom investicija u zdravlje ljudi, pa i demografiju u celini, koji su

u većini tumačenja ljudskog potencijala jedna od njegovih najbitnijih osnova (v. na primer: Поветьев, 2009; Здоровье-основа человеческого потенциала: проблемы и пути их решения, 2013, i dr.). S obzirom na takva tumačenja i definicije ljudskog kapitala, moguće je zaključiti, kao što je već primećeno u stručnim izvorima (Корчагин, 2005; Мазин, 2009, i dr.), da nije lako razlikovati ljudski kapital u najširem smislu te reči od ljudskog potencijala. Uostalom, za razliku od pojma „ljudski resursi“, koji se u osnovi ne odnosi na određenog pojedinca, nego izražava pripadnost organizaciji, regionu ili društvu (Мазин, 2009), pojmovi „ljudski kapital“ i „ljudski potencijal“ imaju i takav smisao i, saglasno tome, širu upotrebnu vrednost. Stoga Корчагин češće korišćenje termina „ljudski potencijal“ u poslednjih nekoliko godina povezuje sa aktivnostima pojedinih organizacija i agencija UN, odnosno izračunavanjem indeksa ljudskog potencijala kojima su se one bavile.

### Концепција ljudskog potencijala

Savremeni autori (Заславская, 2004; Корчагин, 2005; Поветьев, 2009, i dr.) s razlogom navode da je ljudski potencijal, uporedo sa ekonomskim, geopolitičkim i istorijsko-kulturnim potencijalom, suštinski faktor životne sposobnosti svakog naroda i države. Iako su na takvu realnost ukazivali i raniji stručni izvori (Becker, 1983, Schultz, 1971, i dr.), tek u novije vreme je potpuno sazrelo uverenje da suštinu razvojne paradigme svakog društva ne predstavljaju zemlja, sirovine i mašine, nego dobro obučeni i na sveukupni razvoj usmereni ljudi. S obzirom na takvo saznanje, potkrepljeno empirijskim analizama nekih od autora koje pominjemo, ljudski potencijal je danas prepoznat kao najvažniji činilac nacionalnog bogatstva. Kako se njegovim posredstvom realizuju i drugi faktori (ekonomski, socio-kulturni) koji opredeljuju mogućnosti svakog naroda i države da odgovori „na spoljne i unutrašnje izazove i u konačnom slučaju opredeli njihov položaj u mikro sistemu“ (Заславская, 2004, str. 164), dobija se ukupna predstava o celini i dinamici uticaja ljudskog potencijala.

Međutim, vrednost i značaj ljudskog potencijala u savremenim uslovima, odnosno u ekonomijama znanja, ne isključuje izvesne kontroverze koje se pojavljuju u vezi sa operacionalizacijom tog koncepta. Stoga bi se moglo kazati da je ljudski potencijal, kao i ljudski kapital, multidimenzionalan koncept u čijoj su srži znanja, veštine, kompetencije, ali i motivacija i zdravlje ljudi, koje je bilo u „drugom planu“ klasičnih teorija ljudskog kapitala (v. Nahapiet, 2012, i dr.). Iz toga se, međutim, ne bi mogao izvesti zaključak da su sve protivurečnosti u pogledu definisanja pojma „ljudski potencijal“ razrešene, utoliko što je reč o terminu

koji je u „stadijumu formiranja“. S tim u vezi, ruski autor Zaslavskaja (2004) sintetizuje „različita učenja o suštini i osobenostima ljudskog potencijala“ kroz sledeće ocene:

1. Ljudski potencijal podrazumeva pripadnost velikim socijalnim grupama, tj. zemljama, narodima i državama, kao i krupnim regionima i velikim gradovima.
2. Ljudski potencijal je u velikoj meri socijalni fenomen i po poreklu i po manifestacijama. To znači da je u mnogo manjoj meri opredeljen psihološkim i individualno-ličnosnim faktorima.
3. Pojam „ljudski potencijal“ nije prvenstveno usmeren na dostignuti nivo razvitka društva, već na perspektivu njegovog razvoja i samorazvoja na unutrašnjem dinamizmu.
4. Ljudski potencijal je neraskidivo i dvostruko povezan sa čovekovom delatnošću koja je, s jedne strane, u osnovi njegovog formiranja, dok, s druge strane, ljudska delatnost predstavlja oblik njegove realizacije.

Iz ovakve operacionalizacije ljudskog potencijala nije teško zaključiti da Zaslavskaja ne pravi razliku između pojmova „ljudski potencijal“ i „ljudski resursi“, što smo kao tendenciju već uočili u delu profesionalne literature (Bahtijarević Šiber, 1999, i dr.). Da je takva ocena tačna, potvrđuje njena definicija ljudskog potencijala kao faktora životne sposobnosti društva, zemlje i države, koji integralno izražavaju „njegovi ljudski resursi kao subjekta sopstvene reprodukcije i razvitka“ (str. 168).

U drugim izvorima na ruskom jeziku (Мазин, 2009; Поветьев, 2009, i sl.) nailazimo na nešto drugačije tumačenje suštine i smisla ljudskog potencijala. Tako T. Povetjev ljudski potencijal definiše kao „sveukupnost fizičkih i duhovnih snaga njegovih **žitelja** koje mogu biti ispoljene radi postizanja individualnih i društvenih ciljeva – kako instrumentalnih, povezanih sa obezbeđivanjem neophodnih uslova **životne** delatnosti, tako i egzistencijalnih, uključujući proširivanje samih potencijalnosti **čoveka** i mogućnosti njegove samorealizacije“ (Поветьев, 2009, str. 3). Na osnovu takve svoje definicije, Povetjev zaključuje da je ljudski potencijal „kvalitetna karakteristika stanovništva“ koju opredeljuje nivo fizičkog i psihičkog zdravlja i dužina **životnog** veka, nivo obrazovanja, radna motivacija, materijalne i duhovne potrebe, kao i socijalne aktivnosti ljudi.

Povetjev ljudski potencijal shvata u najširem kontekstu. Koncept, po njegovom mišljenju, na socijalno-ekonomskom planu može biti predstavljen kao ljudski resurs, na ekonomskom nivou – kao ljudski kapital, iz tehnološke perspektive kao intelektualni potencijal, dok je iz duhovnog, psihološkog aspekta uputno govoriti o potencijalu ličnosti. Time Povetjev ljudskom potencijalu daje

najšire značenje u okviru jednog broja pojmova koji iskazuju kvalitetna svojstva radne snage, odnosno stanovništva u celini. Istovremeno, Povetjev osnovu ljudskog potencijala vidi u njegovoj demografskoj komponenti koju opredeljuju kvantitativni pokazatelji i njihova dinamika. Stoga se Povetjev uglavnom bavi tom komponentom ljudskog potencijala uključujući i **životni** potencijal, naročito iz perspektive savremenog ljudskog društva.

U analizi Zaslavskaje (2004), ova komponenta ljudskog potencijala, osim broja stanovnika, dužine života, nataliteta i dr., obuhvata i druge pokazatelje: postojanost instituta porodice, odnos broja sklopljenih brakova i razvoda, broj dece bez roditelja i roditeljskog nadzora, kvalitet nacionalnog „genofonda“ i dr. Svi ovi indikatori trebalo bi da pomognu da se potpunije sagleda stanje fizičkog i psihičkog zdravlja stanovništva, odnosno ukupnog kvaliteta njegove životne delatnosti.

Na osnovu uvida u stručnu literaturu na ruskom jeziku, odnosno relevantne tekstove koji se bave ljudskim potencijalom, Zaslavskaja pominje još tri elementa (komponente) tog koncepta: socijalno-ekonomski, socijalno-kulturni i delatni potencijal.

Socijalno-ekonomski aspekt potencijala društva i države izražen je preko nivoa i strukture zanimanja stanovništva, kroz kvalifikacije i profesionalizam radnika, kao i kroz neke pokazatelje koji se odnose na kvalitet života ljudi: nivo blagostanja i realne prihode porodica, dostupnost socijalnih beneficija i usluga, životne šanse različitih socijalnih grupa i slično

Socijalno-kulturni potencijal zemlje iskazan je nivoom obrazovanja stanovništva i osobenostima njegovog nacionalnog mentaliteta koji utiču na razvitak društva. Pritom se prvenstveno misli na normativno-vrednosna saznanja, osobenosti političkih ubeđenja i verovanja, nivo moralnih uverenja, motivaciju i načine ponašanja ljudi.

Delatna komponenta potencijala manifestuje se u aktivnostima i energiji socijalnih aktera, tj. individue, organizacija i grupa u vezi sa izborom inovacionih ili tradicionalnih oblika mišljenja i načina delatnosti, kao i u mogućnostima građana da u određenoj meri ostvare svoje socijalne i stvaralačke potencijale. Kao spoljni indikatori njegove realizacije mogu poslužiti sveobuhvatnost, struktura i razvijenost socijalno-političke, preduzetničke i drugih vidova socijalno-inovacionih aktivnosti građana. Tu se naročito misli na razvoj nevladinih (nekomercijalnih) organizacija i građanskih struktura, na dopunsko i doživotno obrazovanje, na različite forme usavršavanja, odnosno posećivanje kurseva stranih jezika i informacionih tehnologija i slično.

Sve ove komponente u svojoj povezanosti svedoče o kvalitetu ljudskog potencijala na makro nivou, koji se različitim ekonomskim i drugim merama može podsticati i poboljšavati. Poseban problem predstavlja različit nivo razvitka poje-



dinih komponenata ljudskog potencijala, na primer, protivurečnosti demografskog i socijalno-ekonomskog aspekta sa specifičnostima u razvijenim zemljama i zemljama u razvoju, neusklađenost između socijalno-ekonomskog i socijalno-kulturnog potencijala (u mnogim zemljama u tranziciji socijalno-ekonomski potencijal zaostaje za socijalno-kulturnim i slično).

Očigledno je, dakle, da ljudski potencijal, shvaćen u najširem smislu te reči, podrazumeva dugotrajna investiranja u obrazovanje, zdravlje, odnosno „demografiju“, socijalne usluge, tehnološku inovativnost i dr. (videti: Blaug, 1976; Keely, 2009; Paul, 2007; Цыренова, 2006, i dr.), kao i u „modernizaciju infrastrukture koja će takav razvoj podsticati“ (Clarke, 2012), pošto je i to bitna pretpostavka njegovog kvaliteta na nacionalnom nivou, ali i razvoja potencijala pojedinca.

### **Kvalitet ljudskog potencijala i mogućnosti za njegovo merenje**

Međuzavisnost između ljudskog potencijala i nacionalnog razvoja odavno je uočena i pažljivo analizirana u ekonomskoj i srodnoj literaturi (Becker, 1983; Schultz, 1971, i dr.), ali složenost tog odnosa najbolje ilustruje mišljenje Marka Blauga da „ne postoji jednostavan odgovor na jednostavno pitanje da li su nacije bogate zato što su bolje obrazovane ili su bolje obrazovane zato što su bogate“ (Blaug, 1976, p. 100). Iako ova dilema na neki način traje sve do danas, neosporna je povećana uloga ljudskog potencijala u ekonomijama zasnovanim na znanju i u ukupnom nacionalnom razvoju (videti: Boxall, Purgcell, Wright, ed 2010; Burton-Jones and Spender, ed. 2012; Сурпун, 2009, i dr.).

Ne izostaju, međutim, mnoga druga otvorena pitanja, kao što je, na primer, problem merenja kvaliteta ljudskog potencijala i ispitivanja njegovog mogućeg uticaja na nacionalni razvoj. Stoga je relativno malo tekstova koji se bave ovom problematikom i uglavnom iz nešto užih perspektiva. Tako Pastuović (2004) nedvosmisleno dovodi u vezu kvalitet ljudskog potencijala, tj. dva njegova bitna elementa – kvalitet obrazovanja i „kvalitet populacije“ sa nacionalnim razvojem. Na takav zaključak navodi i jedno empirijsko istraživanje iz koga proizilazi da kvalitet obrazovanja i organizaciona struktura obrazovnog sistema, kao i veliki broj „posleškolskih“ obrazovnih aktivnosti, bitno doprinose ekonomskom i ukupnom nacionalnom razvoju (opširnije: Kulić, 2005).

U pristupima utvrđivanju nivoa povezanosti kvaliteta ljudskog potencijala i nacionalnog razvoja bitno je utvrditi elemente koji najbolje odražavaju kompozitni indeks ljudskog potencijala, tim pre što je reč o veoma kompleksnom fenomenu. To, drugačije rečeno, znači da kompozitni indeks može izraziti „pro-

sečna dostignuća u različitim komponentama ljudskog potencijala, što možemo ilustrovati upoređujući metodologiju već pominjanog UNDP pristupa (prosečna dostignuća očekivanog trajanja života, obrazovanja i životnog standarda) i nekih pristupa u ruskoj socijalno-kulturnoj sredini. Tako se u ruskim naučnim krugovima 'treći stub' indeksa BDP 'koriguje', odnosno zamenjuje „sociokulturnom aktivnošću građana i njihovim duhovnim vrednostima, dubinom njihovog unutrašnjeg usvajanja, od kojeg u značajnom stepenu zavisi kako će biti ispoljene druge kvalitativne karakteristike“ (prema: Поветьев, 2009, str. 4).

Time se ne zatvara krug „potencijalnih problema“ u okviru izračunavanja indeksa ljudskog potencijala, naročito kada se radi o kvalitetu obrazovanja i karakteru i dubini sociokulturnih aktivnosti. S obzirom na to da odabiramo multidimenzionalni metod merenja indeksa ljudskog potencijala koji primenjuje UNDP, ključni problem, prema našem mišljenju, jeste utvrđivanje osnovnih elemenata kvaliteta obrazovanja. Zna se, naime, da ljudski potencijal sadrži kvantitativnu i kvalitativnu dimenziju, od kojih prva, naročito kada je obrazovanje u pitanju, nije integralni pokazatelj njegovog indeksa. Još tačnije, pismenost stanovništva, sagledana iz perspektive statistike, često nije funkcionalna, dok povećan broj učenika sa srednjoškolskom diplomom, kao i visokoškolskim diplomama (često sa prevlašću „administrativnih“ u odnosu na „tehničke diplome“), ne garantuje i njihov kvalitet. S tim u vezi, Pastuović (2004) s razlogom pominje „prosečni obrazovni kvalitet“, koji bi trebalo da bude važan cilj obrazovne politike, odnosno jedan od elemenata koji može pokazati kvalitet obrazovanja i sistema obrazovanja u nekoj zemlji u celini. Taj faktor nalazimo u PISA testovima, odnosno testiranju koje svedoči o rezultatima postignuća učenika iz velikog broja zemalja (u 2013. godini učenika iz 65 zemalja) u različitim oblastima, sa izuzetkom predmeta iz oblasti prirodnih nauka, kao i u rezultatima TIMSS istraživanja iz 2011. godine.

To znači da će u ovom tekstu biti uzeta u obzir demografska komponenta ljudskog potencijala u Republici Srbiji sa očekivanim trajanjem života (na osnovu rezultata poslednjeg popisa stanovništva), pismenost odraslog stanovništva i njegova ukupna obrazovna struktura (dovedena u vezu sa rezultatima postignuća učenika iz Srbije na PISA testovima i donekle u TIMSS istraživanjima), kao i bruto nacionalni proizvod (BDP). Neke od ovih pokazatelja doveli ćemo u vezu (koliko to bude moguće) sa indikatorima kvaliteta ljudskog potencijala u zemljama u okruženju.

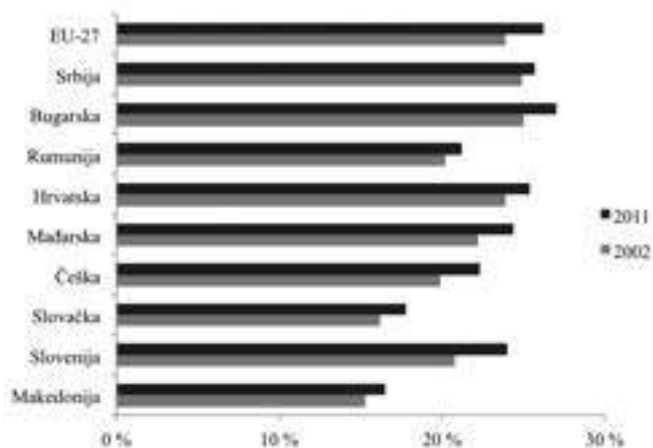
## Neki pokazatelji kvaliteta indeksa ljudskog potencijala u Republici Srbiji

Demografski potencijal s razlogom se prepoznaje kao razvojni resurs ekonomije i ukupnog nacionalnog razvoja (v. Поветъев, 2009, i dr.). Ali, demografski tokovi u Srbiji u poslednjih nekoliko decenija, sa izraženom populacionom regresijom koju su uslovlili ekonomski, socijalni, kulturni i drugi faktori, prete da ograniče i mogućnosti ljudskog faktora, odnosno ljudskog potencijala, koji predstavlja bitan instrument u osnaženju konkurentnosti ekonomije i ukupnog nacionalnog razvoja (v. Jakopin, 2010). Negativne demografske tendencije kojima se karakteriše naše društvo imaju za posledicu da Srbija danas spada u red zemalja u kojima mortalitet nadmašuje natalitet. Posmatrano sa ekonomskog aspekta, takve tendencije su dugoročno neodržive jer dovode do kadrovskog deficita i ekonomije koja nije u stanju da bude konkurentna.

Na promene u ukupnom stanovništvu Srbije delimično su uticale prisilne migracije, što je doprinelo ublažavanju depopulacije. Međutim, dugoročne negativne populacione tendencije na ovaj način su samo neznatno ublažene. Rezultati popisa stanovništva iz 2011. godine svedoče o nastavku tendencije smanjenja stanovnika u Srbiji (4,2% između dva popisa) i povećanju njegove prosečne starosti (42,2 godine) (RZS, 2012-a). Odnos starog i mladog stanovništva, izražen preko indeksa starenja, daje nam za pravo da stanovništvo u Republici Srbiji smatramo starom populacijom.

Rezultati projekcija (prema: Jakopin, 2010), istovremeno, ukazuju da će proces populacionog starenja u Srbiji u narednom periodu nastaviti kontinuirano da raste, kao i da će se broj osoba starijih od 65 godina povećati za trećinu u 2052. godini. Neki autori (Pejatović, 2005) ističu da se sve veće stope negativnog prirodnog priraštaja za teritoriju Republike Srbije (bez Kosova i Metohije) beleže naročito od 1992. godine, kada se kreću u razmerama takozvane bele kuge, dok nizak nivo fertiliteta, isprva kao karakteristika pojedinih regiona a potom i društva u celini, ukazuje na pojavu depopulacionih tendencija na nivou zemlje od 1989. godine. Drugim rečima, to znači da u ovom periodu neto stopa reprodukcije pada ispod jedinice, odnosno ispod nivoa potrebnog da bi se stanovništvo obnavljalo.

Veliki broj zemalja Evrope takođe se suočava sa problemom ubrzanog starenja stanovništva. Tako na primer, koeficijent starosne zavisnosti EU-27 iznosi 26,2%, nešto je viši nego u Srbiji, i kreće se od 17,2% u Irskoj do 31,2% u Nemačkoj (MRRLS RS, 2013) (Grafikon 1). Projekcije pokazuju da će se koeficijent demografske zavisnosti starog stanovništva za pola veka u Evropi udvostručiti i da će sa sadašnjih 26 narasti na 52,5% u 2060. godini.



**Grafikon 1:** Koeficijent starosne zavisnosti odabranih zemalja 2002–2011.

U projekcijama za 2050. godinu se predviđa da će udeo stanovnika starijih od 65 godina na svetskom nivou iznositi 16,2%, dok će u razvijenim zemljama dostići cifru od 25,7% (UN, 2010). Procene očekivanog trajanja života stanovništva Srbije (MRRLS RS, 2013) takođe pokazuju tendenciju rasta, pri čemu postoji značajna razlika između muškog i ženskog dela stanovništva koja se javlja kao posledica različite stope mortaliteta u odnosu na pol i to naročito u populaciji iznad 60 godina starosti (Tabela 1).

**Tabela 1:** Poređenje zemalja prema očekivanom trajanju života 2011.

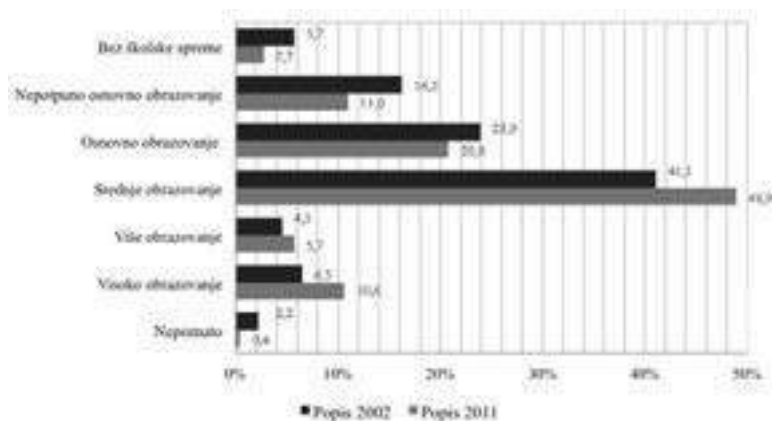
	Muškarci	Žene
Srbija	71,6	76,8
EU-27	77,0	82,9
Bugarska	70,7	77,8
Makedonija	73,1	77,2
Mađarska	71,2	78,7
Rumunija	71,0	78,2
Slovenija	76,8	83,3
Hrvatska	73,9	80,4
Crna Gora	73,4	78,9
Češka	74,8	81,1

Porast u proceni očekivanog trajanja života, karakterističan za naše društvo, nastaje zbog smanjenog mortaliteta odojčadi i dece, kao i zbog smanjivanja mortaliteta starih lica i njihovog dužeg prosečnog života. Taj rast se pripisuje porastu životnog standarda, boljoj zdravstvenoj zaštiti, kao i boljim uslovima života.

Relevantni stručni izvori (Повећев, 2009) ukazuju na to da visoka prosečna starost stanovništva ne predstavlja dobru osnovu za uspešan ekonomski rast i razvoj društva. Stoga je veoma bitno, kao što se navodi u jednom drugom izvoru (Крутько, Смирнова, 2012), da se pažljivo osmisle strategije i planovi razvitka „demografske situacije“ i verovatnih tendencija u njenom razvoju, sa posebnim osvrtom na ekonomski razvoj i konkurentnu sposobnost svake nacionalne ekonomije.

Potpunije sagledavanje vrednosti i značaja ljudskog potencijala u savremenim uslovima ekonomskog razvoja, osim demografskih karakteristika stanovništva, podrazumeva uzimanje u obzir i pokazatelja koji se odnose na nivo pismenosti i obrazovnu strukturu stanovništva nekog društva. Prema rezultatima popisa stanovništva Srbije iz 2011. godine (RZS, 2012-b), ukupan broj nepismenih lica starih deset i preko deset godina iznosio je 1,96%, što je manje u odnosu na rezultate popisa iz 2002. godine, kada je udeo nepismenih bio 3,45%.

Rezultati analiza (RZS, 2012-b, str. 25), međutim, pokazuju da je, i pored izvesnih poboljšanja u odnosu na stanje iz 2002. godine, ukupna obrazovna struktura stanovništva Srbije i dalje veoma nepovoljna. To naročito ilustruju dva pokazatelja – bez školske spreme je 2,7% stanovništva, dok je sa nepotpunom osnovnom školom 11% populacije. Gotovo 21% stanovništva poseduje osnovno obrazovanje kao svoj obrazovni maksimum, što, zapravo, znači da se oko 34% stanovništva nalazi na osnovnom obrazovnom minimumu ili ispod njega (Grafikon 2).



**Grafikon 2:** Školska sprema stanovništva starog 15 i preko 15 godina prema popisima 2002. i 2011. godine

Takođe, stopa završetka osnovnog obrazovanja u Srbiji znatno je niža od stope upisa, koja iznosi između 95 i 98%. Prema nekim istraživanjima (Despotović, 2009), stopa završetka osnovnog obrazovanja se kreće između 80% i 85%, te se može zaključiti da konstantna „produkcija“ stanovništva bez elementarne pismenosti i potpunog osnovnog obrazovanja u značajnoj meri generiše siromaštvo i umanjuje ekonomsko-obrazovni potencijal društva.

Očigledno je, međutim, da uspeh, konkurentnost i razvoj neke zemlje u globalnom svetu u sve većoj meri zavise od kvaliteta obrazovanja i efikasnosti vaspitno-obrazovnih sistema. Obrazovanje je u snažnoj korelaciji sa društveno-humanim razvojem i jedan je od ključnih preduslova za stvaranje kvalitetnih uslova za život pojedinca i čitavih zajednica. Kvalitet ljudskog potencijala, a posebno obrazovni nivo i pismenost stanovništva, predstavlja najvažniji faktor koji će imati odlučujući uticaj na uspeh i razvoj Srbije u budućnosti.

Jedan od pouzdanijih načina za procenu nivoa pismenosti stanovništva, kao i kvaliteta obrazovanja i obrazovnog sistema u nekoj zemlji, predstavljaju rezultati PISA (Programme for International Student Assessment) i TIMSS (Trends in International Mathematics and Science Study) istraživanja, a na čiji se značaj ukazuje u nekim stručnim izvorima (Крутько, Смирнова, 2012). Rezultati ovih istraživanja služe i kao izvori podataka o važnim indikatorima preko kojih se procenjuje i prati stanje, a i napredak u obrazovanju. Prikupljeni podaci omogućavaju sistematsko praćenje stepena razvoja nekih od ključnih kompetencija (čitalačke, matematičke i naučne), koje su mladima neophodne za uspešan život u savremenom društvu.

Rezultati PISA istraživanja iz 2009. godine pokazuju da je Srbija u odnosu na 2006. godinu ostvarila napredak u oblastima čitalačke, matematičke i naučne pismenosti, da je visok broj funkcionalno nepismenih učenika smanjen, ali i da je, uprkos izvesnom napretku, ukupan prosečan rezultat iz te tri oblasti i dalje za oko 60 poena niži u odnosu na zemlje OECD-a (učenici iz Srbije ostvarili su prosečno 442 poena, što je manje od proseka koji na standardizovanoj skali iznosi 500 poena) (Jakopin, 2010). Kvalitet obrazovanja u Srbiji je u svakom ispitivanom domenu u značajnoj meri niži i u odnosu na neke zemlje iz okruženja (u odnosu na Sloveniju, Hrvatsku, Poljsku, Slovačku), dok trećina ispitanika, iz perspektive kriterijuma EU, nije dostigla nivo funkcionalne pismenosti, a što može važiti i za oko 10% učenika koji nakon osnovne škole ne nastavljaju dalje školovanje (Baucal, 2012).

Najnoviji rezultati testiranja iz 2012. godine (prema: Pavlović Babić i Baucal, 2013) pokazuju da su đaci iz Srbije ostvarili bolja postignuća u odnosu na prethodno ispitivanje, mada se i dalje nalaze ispod proseka zemalja OECD-a i većine članica EU. Na skali sa 65 država, Srbija je napredovala sa 47. na 43.

mesto, ali se, ipak, nalazi daleko iza proseka OECD-a i nekih država iz regiona (iza Hrvatske i Slovenije). Rezultati testiranja pokazuju da na skali matematičke pismenosti oko 40% učenika nije dostiglo nivo funkcionalne pismenosti, što je na istom nivou kao i 2009. godine. U odnosu na zemlje OECD-a, matematička kompetencija učenika iz Srbije je niža za oko 45 poena, što odgovara efektu jedne godine školovanja.

Za razliku od prilično loših rezultata ostvarenih u ranijim ciklusima PISA i TIMSS (Trends in International Mathematics and Science Study) istraživanja (v. Gašić Pavišić i Stanković, 2012), rezultati analiza iz 2011. godine (Martin, Mullis, Foy & Stanco, 2012) pokazuju da su učenici iz Srbije na TIMSS istraživanju ostvarili veoma dobre rezultate na testovima postignuća iz matematike i prirodnih nauka.

Rezultati analiza ukazuju da Srbija sa prosečnim skorom od 516 poena ulazi u red zemalja čiji je skor statistički značajno iznad proseka TIMSS skale. Učenici iz Srbije ostvarili su bolja postignuća ne samo u odnosu na učenike zemalja iz okruženja već i u odnosu na učenike nekih razvijenih zemalja sveta. To što je TIMSS istraživanje u 2011. godini u Srbiji realizovano samo u četvrtom razredu osnovne škole, dok je u prethodnim ciklusima (TIMSS 2003. i 2007) rađeno u osmom razredu, ukazuje na nepostojanje referentnih podataka iz prethodnih istraživanja i donekle otežava dalje analize i izvođenje pouzdanih zaključaka. No, i pored toga, neki autori (Gašić Pavišić, Stanković, 2012), s pravom, ističu da je u vremenima kada se pocrtava konkurentnost nacionalnih ekonomija, a efektivnost obrazovnih sistema vidi kao njen ključni preduslov, pristup međunarodno uporedivim podacima o kompetencijama učenika u oblasti matematike i prirodnih nauka od velike važnosti.

Ovi rezultati potvrđuju kvalitet obrazovnog sistema u Srbiji makar kada je reč o prvom ciklusu obrazovanja. Istovremeno, podaci pokazuju da kvalitet obrazovanja, a samim tim i međunarodni rejting neke zemlje, opada sa uzrastom učenika, što je zapaženo u nekim srodnim istraživanjima i analizama u svetu (v. Крутько, Смирнова, 2012).

Jedan od najsloženijih pokazatelja nivoa ljudskog potencijala i kvaliteta života je kompozitni indeks humanog razvoja. Indeksom humanog razvoja, odnosno indeksom ljudskog potencijala izražavaju se prosečna dostignuća zemlje u domenu zdravlja, obrazovanja i životnog standarda. To znači da indeks ljudskog potencijala predstavlja kombinaciju tri dimenzije: očekivanog trajanja života, obrazovanja (iskazanog preko stope pismenosti odraslog stanovništva) i životnog standarda (BDP po kupovnoj moći po glavi stanovnika).

Rezultati analiza (Jakopin, 2010) pokazuju da kvalitet života u Srbiji od 2000. godine konstantno raste. Zahvaljujući povećanju očekivanog trajanja živo-

ta, stope pismenosti i rastu BDP-a po glavi stanovnika, Srbija se od 2004. godine nalazi u grupi zemalja sa visokim nivoom humanog razvoja (HDI indeks uzima vrednost 0,811). U 2007. godini nastavljen je rast indeksa ljudskog potencijala, koji je u ovom periodu iznosio 0,826, tako da je Srbija na svetskoj rang-listi, prema dostignutoj vrednosti indeksa kupovne moći, zadržala 67 mesto. No, i pored određenog napretka, Srbija u ovom periodu zaostaje za nekim zemljama u okruženju (Rumunija zauzima 63. mesto), dok Slovenija pripada grupi zemalja koje imaju izrazito visoku vrednost indeksa ljudskog potencijala. Višegodišnja tendencija rasta indeksa ljudskog potencijala u Srbiji je zaustavljena tokom 2008. godine.

Prema rezultatima iz 2010. godine (MF RS, 2011), Srbija (sa očekivanim životnim vekom od 73,7 godine i BND-om od 10.449\$) spada u red zemalja sa srednjim prihodima i visokim nivoom humanog razvoja (HDI indeks 0,735). Prema poslednjoj analizi pokazatelja humanog razvoja za 2012. godinu, Srbija beleži pad, i sa indeksom 0,769 zauzima 64. mesto na skali. U odnosu na zemlje iz regiona, Srbija je ispred Makedonije i Bosne i Hercegovine, ali zaostaje za Crnom Gorom, Rumunijom i Bugarskom. Znatno bolje od Srbije su Slovenija (21) i Hrvatska (47), dok grupu zemalja sa veoma visokim nivoom humanog razvoja gotovo čitavu deceniju predvode Norveška, Australija i SAD (UN DP, 2013).

Na osnovu prikazanog se može zaključiti da je Srbija zemlja sa visokim nivoom humanog razvoja, ali da i dalje zaostaje za zemljama EU, kao i nekim zemljama iz regiona. U periodu od 2005. do 2012. godine vrednost indeksa humanog razvoja je porasla za 7%, dok je očekivani životni vek pri rođenju porastao za više od jedne godine. Prosečan broj godina obrazovanja odraslih u pomenutom periodu beleži rast od 1%, dok je očekivani broj godina školovanja skromno porastao. Iskustva razvijenih zemalja upućuju na zaključak da uslov bržeg ekonomskog razvoja Srbije, pored ekonomske stabilnosti i rasta proizvodnje, predstavlja poboljšavanje uslova obrazovanja i opismenjavanje odraslog stanovništva. Ako se ima u vidu postojeći (nedovoljan) demografski potencijal, Srbiji je potreban duži vremenski period za razvoj infrastrukture „ljudskog kapitala“, kao kritičnog faktora za održiv ekonomski rast i poboljšanje kvaliteta života (Jakopin, 2010). U skladu sa takvim razvojem je i ocena da ljudski resursi u Srbiji na sadašnjem stepenu njenog razvoja nisu odlučujući faktor nacionalne konkurentne sposobnosti, odnosno ne predstavljaju njenu dovoljnu komparativnu prednost u odnosu na zemlje u regionu, a naročito u širem okruženju (opširnije: Kulić, Đurić, 2014). To potvrđuju i neki drugi pokazatelji, kao što su, recimo, indeks nivoa obrazovanja (indeks nivoa pismenosti i ukupnog procenta učenika obuhvaćenih obrazovanjem) i indeks izdvajanja sredstava za obrazovanje. Tako je, na primer, indeks nivoa obrazovanja Australije 0,927 i ona se nalazi na prvom mestu, dok je



Slovenija sa 0,863 na dvanaestom mestu. Iz našeg okruženja još nekoliko država ima veći indeks obrazovanja: Crna Gora 0,774 (38. mesto), Hrvatska 0,770 (39. mesto), Bugarska 0,749 (47. mesto), Rumunija 0,748 (48. mesto), dok iza Srbije, koja ima indeks 0,695 (69. mesto), zaostaju samo Makedonija sa indeksom 0,642 (96. mesto), BiH 0,642 (96. mesto) i Albanija 0,609 (108. mesto) (LIJT, 2015). S obzirom na to da je indeks obrazovanja jedan od ključnih pokazatelja društvenog razvoja, pa se stoga koristi za izračunavanje indeksa humanog razvoja, jasno je da u ovom trenutku taj pokazatelj nije komparativna prednost Srbije ne samo u okviru evropskog okruženja (Norveška, Irska, Nemačka) nego i bližeg okruženja (Slovenija, Hrvatska, Bugarska, Crna Gora i Rumunija).

Ilustrativni su i podaci koji se odnose na izdvajanje sredstava za obrazovanje. Ovi podaci su na prvi pogled neočekivani i u izvesnom smislu protivurečni. Tako, na primer, Srbija izdvaja više sredstava za obrazovanje (5%) od Rusije (4,1%), Hrvatske (4,3%), Rumunije (4,3%) i Bugarske (4,4%), dok veći obim sredstava izdvajaju Slovenija (5,7%) i Mađarska (5,1%) (LIJT, 2015a). Osnovna dilema u analizi ovih rezultata je koliko sredstava u izdvajanju za obrazovanje ide na plate zaposlenih, a koliki je njihov udeo u poboljšanju sistemске infrastrukture i unapređenja obrazovno-nastavne delatnosti.

Dakle, sasvim je izvesno da obrazovna i naročito demografska struktura stanovništva u Srbiji ne predstavljaju izrazito prepoznatljiv faktor socijalno-ekonomskog razvoja zemlje. To znači da su neophodne sistemске mere u sferi demografske politike i u okviru obrazovne politike. Reč je o tome da aktuelna praksa pokazuje da najveći procenat izdvajanja za obrazovanje odlazi upravo na materijalna davanja zaposlenima, dok je mnogo manji deo usmeren na razvojne projekte, odnosno inovacije i istraživanja u oblasti obrazovanja.

### Zaključna razmatranja

Kvalitet ljudskog potencijala je složen fenomen koji je sagledavan iz različitih aspekata – demografskog, socijalno-ekonomskog i drugih perspektiva, da bi se na toj osnovi iznele određene ocene o njegovom uticaju na ekonomski i nacionalni razvoj zemlje. Iz pretežnog dela naših analiza proizilazi da se u nekim od ovih „resursa“ ne nalazi očekivani potencijal socijalno-ekonomskog razvoja Srbije, naročito uzimajući u obzir demografski faktor, a u izvesnoj meri i obrazovanje.

Stoga pismenost odrasle populacije i obrazovna struktura stanovništva u celini potencijalno dobijaju još više na značaju u okviru neophodnih mera da se osnaži i ubrza socijalno-ekonomski razvoj zemlje. To što kvantitativne pokazatelje obrazovnog potencijala stanovništva u Srbiji ne prati u potrebnoj meri i njegova

kvalitativna dimenzija, na šta ukazuju rezultati PISA i TIMSS istraživanja, ne znači da se takva nepovoljna tendencija ne može poboljšati. Drugačije rečeno, na poboljšanje kvaliteta obrazovnog potencijala u Srbiji može se uticati u okvirima razvijanja različitih obrazovnih strategija koje će biti u funkciji ne samo povećanja „kvaliteta radne snage“ nego i ukupnog individualnog i društvenog razvoja. Takva očekivanja su još realnija u ogledalu saznanja da se ljudski kapital, odnosno ljudski potencijal ne „akumulira“ samo „u procesu školskog obrazovanja, gde se stiču osnovna znanja i navike nego i u vreme posleškolskog obrazovanja, usmerenog na sticanje određenih profesija, a takođe i u okviru profesionalne delatnosti“ (Гапонюк, 2011, str. 25). Na značaj i potrebu takvog pristupa ljudskom potencijalu i unapređivanju njegovog kvaliteta ukazuje se i u drugim stručnim izvorima (Paustović, 2004; Kulić i Despotović, 2010; Winterton, 2010; Данилюк, Кондаков, 2011; Blair, 2012, i dr.) koji se, između ostalog, bave i uticajem ljudskih resursa, odnosno kvaliteta ljudskog potencijala na ekonomsku konkurentnu sposobnost i ekonomski razvoj na nacionalnom nivou u celini.

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## Quality of Human Potential and Economic Growth at the National Level

**Abstract:** The quality of human resources today is recognized as being an integral part of the national wealth and a driving force of economic and general progress. It is a complex and dynamic phenomenon that has both a present and a future. This should be taken into account when analyzing all elements of human potential, and when designing and developing the most efficient educational strategies for their improvement and continuous development. Based on insights into the demographic component of human resources and adult literacy and its overall educational structure analyzed from the aspect of the results of pupils from Serbia on PISA tests, it can be concluded that these two “resources” do not reflect the expected potential of economic and national development of the country. To be more precise, the demographic potential of Serbia is a hindrance rather than a contributing factor to development, while education, and the quality of education in particular, requires innovation and long-term measures and stimulation in order to strengthen and expand economic development and national development in general.

**Key words:** quality of human potential, demographic potential, educational strategies, educational resources, national development, socio-economic development.

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# Adult Education within a Circular Migration Scheme. A Case Study from New Zealand

**Abstract:** This article examines the adult education and learning that occurs between a Māori business and the workers they employ from the Pacific nation of Tonga through the Recognised Seasonal Employer (RSE) scheme, a seasonal labour strategy allowing for the temporary entry of migrant workers in the horticulture and viticultural industries, with a preference for workers from the Pacific nations.. Māori are indigenous to NZ but their historical ties extend back to Polynesia in the Pacific and therefore common historical narratives exist between Māori and those from Tonga. A case study approach is used to highlight how adult education is embedded. Central to the success of this case study is the validation and implementation of indigenous knowledges and rituals.

**Key words:** adult education, education for circular migration, indigenous education.

## Introduction

This article situates itself in New Zealand (NZ) and examines the adult education and learning that occurs between a Māori business and the workers they employ from the Pacific nation of Tonga through a circular migration scheme. Introduced in 2007, the Recognised Seasonal Employer (RSE) scheme is a seasonal labour strategy allowing for the temporary entry of migrant workers in the horticulture and viticultural industries, with a preference for workers from the Pacific nations. This article affirms and articulates the value of culture in adding to the success of this business relationship and the adult education process. Māori are indigenous to NZ but their historical ties extend back to Polynesia in the Pacific and therefore common historical narratives exist between Māori and those from Tonga.

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## Adult learning in Māori and Pacific societies

Thaman (2009) and Vaioleti (2011) state that many of our indigenous cultures have evolved over thousands of years and today the biggest challenge for us educators is to how best to prepare people to live in an increasingly changing and globalised world while at the same time develop systems that will ensure the continuity and sustainability of their futures and cultures. Thaman (2009) suggests that in our teaching and learning to live wisely and sustainably, that we should look within ourselves and our cultures for the knowledge, values, and behaviours that will help guide us to a new beginning. The RSE scheme between Māori as the indigenous people and Tongan as peoples from the Pacific has been founded on a family (whānau) and village or kin related (kāinga) relationship enhancement model in which culture is practised and validated and accountability and support structures are important (Morrison, 2014). Within this framework, learning was purposeful and aimed at the acquisition of skills and knowledge to perform inherited roles dictated by the collective to which that person belonged, known as the kāinga (kin groups, family, can also mean place, village).

Kāinga forms the basic social unit in which relationships ensure learning occurs to solidify a spiritual and an economic base towards collective wellbeing. Kāinga membership is determined through whakapapa or genealogical links extended to include relationships to ancestral domains and spiritual beings. This is also a feature of a Pacific view of relationships which has intergenerational accountability (Vaioleti, 2011). There is a sense of spiritual interconnectedness with the land, rivers and seas ensuring a caretaker role (kaitiakitanga) which seeks to preserve and treat resources in a sustainable way. Intrinsic to Māori and Pacific societies is its ritualistic nature, its accountability to the past as well as the future, its collective orientation and its emphasis on processes as much as outcomes.

Ako is an overriding principle encompassing both to teach and to learn. It is reciprocal learning. Ako is driven by cultural, spiritual as well as collective concepts, motivations and aspirations involving training, learning by osmosis, doing, observing, practising, reflecting, consulting and visioning and hope (Thaman, 1988; Vaioleti, 2011). Learning in Pacific and Māori communities was stratified. Tiatia (1998) talks about Pacific societies expecting everyone to know and perform their role. Traditionally skills and knowledge for roles were taught between generations by way of non-formal, informal, non-formal including apprenticeship. Ako then as learning processes has a vital role to assist Māori and Pacific to advance their learning opportunities in conjunction with instilling cultural values in order to maintain cultures, worldviews and continuity of their societies. Success in terms of traditional education for Māori and Pacific is reliant upon these



concepts interrelating and informing the other within the holistic framework which is grounded in Pacific epistemological frameworks.

Learning and education within the RSE scheme took place through *ako* and to benefit the *kāinga*. Learning was purposeful and brought meaning to the wider collective. Given the shared historical ties, common ancestry and similar narratives that Māori and Tongans both share, some aspects of each others cultural ways would not have been unfamiliar. The ultimate goal of *ako* for Pacific people is to live harmoniously in a sustainable relationship with others, the environment and their God/s (Vaiolleti, 2011). *Fatongia* is one's role, duty or obligation to family and community to ensure the above is achieved then *tauhi vaa* (the nurturing of respectful space) must be present to maintain a symbolic space between individuals, groups and with Gods. This is vital for harmony and good relationships. The RSE workers brought their traditional cultural constructs with them and this *kāinga* model was reproduced in the scheme. Further, the leadership model founded on the Tongan matriarchal system drew on the respect that Tongans have for senior women. This role is called the *Pou Awhina* (pillar of care) and take its name from the Māori meeting house positioned on the *marae*(meeting place) located at Motueka where this RSE scheme is located. This pastoral care role and mentorship gives a cultural pillar to the RSE group reinforcing identity and cultural expression. Culture in learning and in the workplace matters.

Given that adult education for Māori and Pacific peoples is also about perpetuating cultural and linguistic practices, reclaiming power over their own lives and destiny and progressing towards self determining pathways, then this group of workers were progressing on their learning journeys through this work scheme.

### **The Recognised Seasonal Employment Scheme and its Context**

The RSE scheme is a relatively new seasonal labour strategy introduced to New Zealand in 2007. It allows for the temporary entry of migrant workers in the horticulture and viticultural industries, with a preference for workers from the Pacific nations. and particularly from the rural areas with a selection criteria that prioritises the pro poor. This is because there is an excess workforce in the Pacific and opportunities for work are very limited. In the rural areas there are even more constraints for work and a large pool of unskilled and low skilled workers (Rooda, 2011). The development strategies in the Pacific for the RSE programme are to:

- maximise the flow of remittances

- encouraging more productive use of remittances (e.g. for entrepreneurial or investment activities, not just consumption)
- work-specific training to make workers more productive and /or enable them to move into higher paying jobs (e.g. supervisors, forklift drivers)
- other training to provide skills to workers that have broader relevance
- encourage New Zealand RSE's to explore investment opportunities in the islands
- leverage increased tourism off RSE (e.g. by raising awareness in New Zealand communities of the islands).

(Roorda, 2011).

This type of circular migration programme aligns with the NZ Government's strategy in Strengthening Pacific Partnerships with a focus on economic development, regional integration and good governance (Department of Labour, 2012).

Studies on RSE have predominantly examined the economic and social implications of the workers' experiences in the destination country and workers' earnings and their remittances as key benefits for families and communities back home (Bedford C., 2013). There has also been some literature on the skill acquisition and transfer of knowledge however there is not much written on the adult learning aspects of the RSE scheme and especially the learning that occurs through engagement with the employer and in the wider community's learnings and linkages.

The RSE employer in this case study is Wakatu Inc, an internationally recognised indigenous business of the land and sea which has an asset base valued at over \$250 million. They are the largest private land owner in the Nelson district of NZ and one of the largest employers in the region contributing significantly to the economic wealth and well-being of the community (Wakatu Incorporation, 2012). Wakatu as a Māori business is based on family relationships. Integral to their business operation, is the concept of *whānaungatanga* and *manaakitanga*. *Whānaungatanga* means to create and to value respectful relationships which encourage reciprocity. *Manaakitanga* means to support, to respect and to care for each other. The RSE scheme is managed by a subsidiary company of Wakatu called Kono Horticulture. Kono is based in a small rural community called Motueka (47 km west of Nelson) and is the food and beverage side of Wakatu of which horticulture and viticulture is part. Central to Māori values is the special connection to the lands and waters essential for the survival and wellbeing of the people. Māori then has developed an ethic of care for the land, a spiritual interconnectedness which extends to other living and non living entities as stewards

or guardians, kaitiaki. This means that when the people from Tonga arrive to pick fruit and to work on the land, then rituals must be enacted to keep all safe. It is important that in fulfilling this role of kaitiaki that Māori express generosity to those who come to work on the land. People need to be honoured. In fact Māori have a proverb “He aha te mea nui o te ao, he tangata, he tangata, he tangata.” What is the most important thing in the world. It is people. It is people. It is people. This means that Māori must care for the mana (prestige) of each individual in the spirit of manaakitanga (generosity). This extends also to the seasonal workers who are employed by them from Tonga.

### Partnerships

Working with Wakatu/Kono is a Charitable Trust called IMPAECT\* (Indigenous Māori and Pacific Adult Education Charitable Trust). IMPAECT\* has been a registered trust for more than 10 years. As one of its objectives, it proposes to advance educational aspirations for both Māori and Pacific communities using the principles of adult education to achieve outcomes that are valid, authentic and meaningful for Māori and Pacific and to support family and community development for Māori, Pacific and indigenous groups (IMPAECT\* Constitution, 2003). It operates in Tonga and in New Zealand.

IMPAECT\* has been the group which has managed the RSE scheme with Kono Horticulture and has strategic oversight for selection of workers from Tonga and pastoral care. The IMPAECT\* team has been intentional and deliberate in adhering to a leadership and management style which is traditional in nature, based on kinship, reciprocity and underpinned by collectivistic notions of support. The leadership model for the workers, based on the traditional Tongan matriarchal system, is transplanted to a NZ context and the Pou Awhina is tasked to maintain the social and cultural cohesiveness of the group throughout the duration of their stay in New Zealand. IMPAECT\* believes (and has anecdotal evidence) that this leadership strategy has been a success in alleviating and ameliorating a range of possible problems before they occurred, thus benefitting Kono. In Tonga, IMPAECT\* also has a team which supports the families of the workers, this being regarded as equally important to the success of the scheme.

The pastoral care model is based on a family (whānau) and village (kāinga) relationship enhancement model in which culture is practised and validated and accountability and support structures are important. As a result there is a high level of work productivity and profit for Kono; financial gains for the workers mediated by the acknowledgement to holistic, spiritual and cultural norms

throughout the relationship. The skills and importance of the RSE workers to the economic sustainability of Kono was reflected in the comments by Kono's Horticultural Manager who suggested that the RSE workers are integral to the success of the business operation as they are a reliable workforce that will deliver quality products constantly. Skills acquisition, skills transfer and adult learning outcomes are also important. IMPAECT\* stands by their philosophy in the belief that adult education is a tool for transforming individuals and communities.

Through these cultural and learning exchanges, a successful business partnership has been created which in turn has contributed to a socially cohesive and culturally inclusive RSE community.

### **Learning journeys**

There are four distinct phases in the learning journey for the workers:

- Worker selection and readiness for NZ
- Worker transition
- Worker enhancement through daily routines and community interactions
- Worker return to family/community in Tonga

### **Worker selection and readiness for NZ**

Workers who wish to avail themselves to the RSE scheme must adhere to two sets of compliances and principles. Firstly NZ legislation requests candidates pass police checks and health checks and will abide by the rules of the receiving country (New Zealand Immigration, n.d). Workers are also expected to uphold the sending country's reputation as a reliable source of seasonal workers. Government officials in sending countries (in this case, Tonga) are required to conduct Orientation programmes which assist the workers to be informed on legal requirements of entry into New Zealand and ease their transition into a new country. While much of these programmes can be conducted in the Tongan language, official forms need to be completed in the English language to which the worker will sign as having understood all that is stated on that form. For someone who has come from a poor community, generally their access to formal education has been limited and with low educational capacity, the process of recruiting into the scheme and costs can be prohibitive unless there is a high level of support from those responsible for the recruiting. Offers of employment from the intended

employer, insurance and tax forms are all in English. Prospective workers therefore place a lot of trust in the recruiting agency as they navigate official processes; official language; compliance laws from a different country and then sign these forms as if they fully understand the meaning which is a flaw in the process.

On IMPAECT\*'s part, they offer another level of teaching to ensure the success of the team and to mitigate against untoward activity and behaviour. These teams are in NZ for 7 months during which they have to work and live together so team cohesion and understanding is essential. The principles of the Trust request candidates for selection to:

1. Have a kinship connection to IMPAECT\*
2. Have a commitment to ongoing education and learning at all levels
3. Have a commitment to supporting the wellbeing of their family, village and nation and Māori and Pacific peoples generally
4. Be actively engaged culturally in their communities and understanding cultural tenets

Once workers indicate their wish to be selected, then the IMPAECT\* selection team sit down with the wider family to talanoa.<sup>2</sup> The talanoa is an important part of the process and is the pedagogy used to co-learn with all who are present and involved. There are discussions with the family of the expectations of the workers in terms of behaviour, conduct, work ethic and financial goals. It is important that both the family and the worker are aware of the challenges which can be expected; the earnings to be made and the culture of NZ and the workplace which is driven by Māori cultural values. In this setting and at this time also there are discussions regarding the welfare of the family during the absence of the family member and the resources that will be available to meet the family's needs. This time also allows for the IMPAECT\* Selection team to assess the ability of the worker to provide for his family by observing whether there are family plantations, gardens and other resources. If the plantation is large and abundant, it is a visible sign of an industrious worker and work ethic. Financial goals are then set with the agreement of the family so every family member knows the value of remittances which will be received and can plan accordingly. The worker is also clear about the financial commitments and obligations that they must keep to support their family. For some families this is the first time that the worker would have had a steady regular job and been in the position to set a financial goal. This in itself is a powerful learning let alone the new skills learnt in financial literacy.

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<sup>2</sup> Talanoa is to literally talk about nothing. It is a culturally constructed engagement and discussion and accepted as a methodological tool (Vaiotei, 2011)

Basic financial calculations are worked through even at this early stage of the recruitment process so that each worker and their family together can set short term goals and long term goals which then further entrenches the workers' commitment to the scheme and promotes a successful period of work.

As a follow on, the workers ability in the English language is also assessed and while it is preferable that they have a good knowledge of English, it is not mandatory as others in the team will be able to convey messages. The RSE scheme allows the opportunity to increase the worker's English language skill level as part of their daily work routine. The procedure of form filling and document signing and degree of understanding helps the recruiting team to assess the language skill and ability to follow instruction. In the process of these official document processes, members of IMPAECT\* work with individuals to guide them in meeting these action based learnings.

The selection process conducted by IMPAECT\* personnel canvasses NZ culture; the context of working in the small rural town of Motueka ; working and living conditions; team cohesiveness; ability to listen to instruction; and to abide by the guidance of the Pou Awhina <sup>3</sup>. Visual pictures are often shown to help give meaning and some equipment has been sent to Tonga by Wakatu/Kono so that workers can test their physical strength, as well as cognition and team skills.

Given the strong Christian faith of many Tongans, workers are also expected to attend and commit to choir practice and church activities as these are necessary for their holistic wellness and for the cohesiveness of the group. Similarly they are also made aware of the history, the structure and the values of the local tribe which contributes to the philosophy of Wakatu/Kono to enhance their awareness of the environment and sense of belonging . All this is conducted through talanoa and hands on practical learning and prepares the workers to be ready to live and work in a new land particularly because they are preparing themselves to work on the land of the indigenous people which has its own spirituality and meaning.

The Pou Awhina who is a member of IMPAECT\*\* uses the Tongan and Māori notion of ako (reciprocal learning) to work carefully with each worker, completing official documents in English, building a relationship already which will hold them in good stead through their stay in NZ. The relationship between all the workers and in particular with the Pou Awhina is based on the concept of vaa. Vaa, is the space in between, it is a space that connects and it is a shared Pacific notion of space (Ka'ili, 2005, Lilomaiva-Docktor, 2009, Mahina, 1993). Lilomaiva-Doktor (2009) described vaa specifically as the space that relates, a

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<sup>3</sup> Literally means the pillar of strength but should be interpreted here as the Leader of Pastoral Care

description that references the social roots of a concept for a group of principally relational beings. In this RSE scheme, the maintenance and nurturing of the vaa is behoven on all within the scheme however the Pou Awhina becomes the principal guardian of this important concept which is a major contributor to the group's cohesion and harmony.

### **Worker transitions**

Critical to being employed under the auspices of Wakatu/Kono is the importance of being embraced through the inclusive ritual of powhiri. Powhiri is a ritual of encounter. It is cultural process in which people of a land are allowed to assess, make connections spiritually to include visitors into their fold. The physical process of this metaphoric fusion and inclusion as members of their fold are as follows:

The RSE workers gather at the local tribal marae (meeting place) where they are welcomed through this very formal and sacred ceremony by the people of the land. Briefings as to what to expect have already occurred. During the exchanges which involve speechmaking and setting the parameters of the ensuing relationship, the RSE workers are thanked and honoured for leaving their families and coming to New Zealand to pick fruit and to work. Traditional narratives are then shared on the history and colonisation of the land and how the local tribe are now engaged in development initiatives to grow the tribe economically, socially and culturally. Sometimes there may be exchanges of song and dance during the shared feasting which concludes the ceremony. Through this ritual of encounter, the RSE workers are in fact invited to be part of the extended family of the tribe (whānaungatanga), to engage in a reciprocal relationship of respect (manaakitanga), to value what the land produces as gifts (kaitiakitanga), to share in the many activities of the marae and to uphold the reputation of the tribe (rangatiratanga). Through this cultural learning ritual, the terms of the relationship are set by creating understanding, providing information and inviting an engagement based on honesty and accountability to each other (pono). Teaching on cultural ways and different value systems presents different complexities mainly because values are part of the ontological experience of being human and differences in values can be challenging and confronting if not managed appropriately.

For many workers new to NZ, the whole experience of being in NZ and welcomed through this ritual can be overwhelming, however as they are informed of its importance and then engage in the experience, many workers become aware of its spiritual meaning and feel privileged to have been given such a ritual as can

be seen in these quotes from workers: “the powhiri is a very powerful experience.” (Talanoa, Participant A, February 2013); “the marae and the powhiri is important and helps us as Tongans feel welcome. It is a good learning to know about the Māori culture and to feel it in our heart” (Talanoa, Participant B, February 2013)

Workers then settle into routines in the work place through inductions to the technical aspects of the work. This is carried out through briefings and practise although the on the job experience and practise in the orchards is where the real learning occurs. The work tasks are seasonal and cover:

- Harvesting of fruit
- Pack and sort fruit
- Prune fruit trees
- Maintain crops
- Summer pruning and thinning.
- Tree training
- Tractor driving
- Quality assurance of fruit

Within all of these tasks is a level of expertise and skill required. This is in addition to a high level of fitness and care that workers must possess. At first the supervisors who are NZ based permanent workers conduct new learning through demonstrations of the tasks; then the new workers are invited to practise under close supervision to familiarise themselves with the operations. Over time less supervision is required. Returning workers become the mentors to newer workers using the concept of *ako* which has been embedded through preparatory adult education undertaken in Tonga prior to travel. This is important especially given the fact that many new workers still have a low ability to converse in and understand English. Their willingness to please their employer also can mean that sometimes they say they understand an instruction when the truth is the opposite. Being a cohesive group with kinship ties and cultural understandings based on *ako* and cooperation and support of each other helps to complete tasks. No one worker is left to fail.

Similarly routines are set up in their accomodation which now operates like a little village (*kāinga*). An emphasis on cooperation and collaboration is again paramount but then fundamental to Tongan society is the obligation to their collective kin (*kāinga*) and so in many ways this *fatongia* (obligation) is intrinsic to the workers' character anyway. Consequently the *vaa* continues to be nurtured. Arranging support systems for household duties and personal mentoring are important for ongoing health management and systems are set up to



ensure the workers' physical and spiritual wellbeing and for effective communication to ensure the welfare of their families in Tonga.

The learning tasks for all these domestic procedures fall under the mandate of the Pou Awhina. It is sensitive to raise issues of standards of cleanliness and the management of one's own personal health even more so because the Tonga culture abides by strict gender constructions and a covenant exists between brothers and sisters. This means that matters impacting upon males is only discussed amongst males; matters impacting upon females is only discussed by females. Hierarchy and roles in Tongan culture also matters. The teacher of these sensitive issues and the context in which they get discussed therefore needs to be carefully considered and is usually undertaken by senior kin members of the same gender.

### **Worker enhancement through daily routines and community interactions**

Every evening following the work day the Pou Awhina calls the workers together to share in the evening meal together and to be followed by reflection, prayers and singing, a time known as *famili* (family). The reflection is a guided sharing which encourages the workers to reflect on their day, their insights, new learnings and challenges. Through ongoing sharing then the group is able to strengthen, share concerns and find resolutions to potential problems. It also helps workers find and learn new coping strategies should the need arise.

The Pou Awhina works alongside the workers to assist them to meet their financial goals and she keeps a record financial remittances which are sent back weekly to families in Tonga. Workers are shown how to understand their payslips; they decide the amount per week to send to their families in accordance with goals set and can follow their savings growth. Workers often raise questions in relation to their pay at this time seeking clarification on the system, how they are paid and why they are paid as per the pay slip. This build their critical literacy skills as well as financial literacy skills.

The sending of money is an important activity in helping maintain the *vaa* and the relationship with families in Tonga. Culturally it is not just about transfer of capital but can be viewed as an exchange of tributes where the family in turn reciprocate by sending back prayers, blessings and goodwill to their family member. This act supports the wellbeing (physical and spiritual) of the *kāinga* and gives all members are sense of empowerment. (Vaioleti, 2011).

One of the most traumatic events for the worker is when a loved one passes away while they are in NZ working and over the years, the teams that have come

to NZ under Wakatu/Kono have been witness to the tragedy that an event like this brings. Workers are faced with the decision of returning home or to continue to work in NZ where the money they earn can support high costs of hosting funerals where the exchange of gifts is essential to maintaining the prestige of the family. The loss of loved ones in any culture is devastating. In Tongan culture the vaa which binds the kāinga are incredibly strong and intense and being absent from loved ones at this time can be a painful time. Should the worker remain in NZ then special prayers, services and acknowledgements are made. The elders from the Wakatu/Kono also attend and offer comfort and solace as they would in accordance with their own funeral practises. Should the worker decide to return to Tonga then voluntary financial contributions (koha) assist with costs of flights and funeral costs. Wakau/Kono have established a garden of Remembrance with plants representing those that have passed on.

The philosophy of Wakatu/Kono continues and at times the workers are invited to share in many activities important to the tribe and whānau(family) days. Significant days of celebration such as Waitangi Day and Matariki (Māori New Year) are explained as is their historic significance. The workers participate at the activities of the marae and contribute through their singing and/or expertise in cooking certain Polynesia foods. Just before the harvest is ready, there is an early morning gathering in the orchards where prayers of thanksgiving are made before the Māori God of Harvest (Rongo) for the abundance of fruit grown and produced from the land. The workers are invited to be active participants by leading prayers in partnership with the Māori owners. “it was a very deep experience being able to conduct prayers of thanksgiving together” (Talanoa; Participant C, June 2013); “it was important to thank the gods who have produced fruit of the land which allows us to work and provide money for our families” (Talanoa, Participant A, June 2013)

The main engagement beyond the workplace is with the chosen Church in which the team has decided to have fellowship, a decision made by the Pou Awhina after she visits several churches in the area. For Tongans, Sundays are sacred and nothing will entice them into work. It is a day of rest, prayers and remembrance and the workers likewise adhere to this. Regular attendance at church provides the opportunity for workers to socialise with parts of the community that they would not normally socialise and for an extension of their social skills. Churches also make a big effort to integrate the workers into their communities and there is the added bonus that the workers bring a vitality to what has been dwindling congregations (Bedford, C, 2013). Churches have also been helpful for fundraising activities especially assisting in the financial cost of paying for a container to ship goods back to Tonga. Wakatu/Kono make a regular contribu-

tion to a container realising that workers are actively developing opportunities to set up business activities upon their return home and require goods purchased in NZ to be sent to Tonga.

Wakau/Kono also believe in the importance of education for the workers and directed the workers towards the provision of training and learning opportunities that were Government supported. Under the New Zealand's Pacific Strategy 2007 – 2015, the goal was to increase opportunities and choices for Pacific RSE workers through skills development, by providing them with access to English literacy, numeracy and financial literacy training during their time in New Zealand. (Roorda, 2011). The training provider, Vakameasina was tasked to design a curriculum and delivery around areas of need identified in consultation with employers. These were Financial and Personal Goal Setting; Budgeting in New Zealand; Payslips and Deductions; Employee Rights and Responsibilities; Remittances; and Health and Safety. This teaching would take place outside of work hours; would be held one night a week for 2 hours over 10 hours and would be for free. As opposed to other RSE workforces, the workers recruited for Wakatu/Kono were not all from poor rural areas and many had good levels of English language ability and had formal education at secondary school.

Still keen to advance their learning, when they were offered further courses, the workers chose courses on areas of small business, computer training and financial literacy. These training programmes would stand them in good stead no matter what situation they would find themselves in as their commentary indicates “it was good to think through a business I can start up when I return home” (Talanoa, Participant E, March 2015); “my business plan was how to start a restaurant because I live near the airport and people have to drive past “ (Talanoa, Participant D, June 2015) “I am glad that I know how to email now as I can stay in touch with family cheaply” (Talanoa, Participant A, June 2015).

While these are all commendable and the group as a whole has participated in these classes, at times the workers do struggle to attend and stay enthusiastic especially following a full day of hard work in the field. The merits of such training are however well appreciated.

In a 2011 Evaluative Report by Roorda undertaken on the training of RSE workers some interesting factors arose in relation to cultural factors which underpin teaching and learning:

- i. Workers come from cultures where the teacher knows everything, so don't question the teacher much.
- ii. (They) also don't want to lose face (by speaking out and getting something wrong).

- iii. *X wanted to get to know them. X pushed the books aside and got them talking about their lives.* An employer said they had received “overwhelmingly positive feedback” from workers about the tutor.
- iv. *X made a connection with the learners.* Comments from a range of respondents suggest the tutors were highly regarded by the participants. Workers in one interview commented (about one tutor).
- v. One tutor commented, for example, that a group leader with “huge charisma” would have been insulted to have been placed in a beginner’s group.

Within the Wakatu/Kono group commentary on learning experiences have been similar;

“We learn better when tutors value who we are and where we come from” (Talanoa, Participant E, March 2015)

“Some stuff was boring but once I saw how I can create business opportunity in Tonga then I enjoyed the learning” (Talanoa, Participant A, June 2015)

“It was good to practise English with supervisors.” (Talanoa, Participant E, June 2015)

“I liked the cooking class because we could eat what we made” (Talanoa, Participant B, June 2015)

“What I learnt, then I could use it the next day” (Talanoa, Participant C, March 2015)

“I like x. He treats us like adults who can think. And he expresses himself well. We know what to do.” (Talanoa, Participant D, March 2015)

### **Worker return to family/community in Tonga**

Returning home after seven months of working requires planning which adds to the excitement and anticipation that such an event can bring. For many workers their new financial literacy skills and education and training have encouraged them to think through creating opportunities when they return home and they have been buying materials, tools and other resources which will be shipped back by container. As well there is the end of season reflection which they conduct with the Pou Awhina to assess how well they did in the workplace; in the home space; as a team member in terms of enhancing the vaa and as a community member. It

is also important for the worker to reflect and acknowledge the new learning that has been acquired informally and formally and how they will use and implement that once they return home. These reflections all contribute as to whether the worker will be invited to return for another season. These are conducted through talanoa and helps the worker reflect on all their learnings throughout their time in NZ working.

Before departure Wakatu/Kono host the workers for a meal and ritual of thanks to show their appreciation to them for coming to NZ to work for them and often a small gift is given. As the land welcomed them when they arrived, thus the land bids them farewell. They are invited to engage in a ritual which takes place before the God of Harvest, Rongo so that blessing of the land can be given to them and their families as they make the return home. Their work for this season is now complete.

## Conclusion

The RSE scheme can be one avenue in which a kāinga can start to work towards building a sustainable livelihood but is highly dependent on what financial plans and broader development goals are set by the workers and their families. The adult learning and education pathways are integral to the success of the programmes.

The policy to select workers upon the basis of a pro poor approach also generally means that these workers also have low education levels and therefore appropriate teaching and learning pedagogies are essential throughout the entire RSE scheme. Culture matters in the adult education delivery; it matters at the interface of Māori and Tongan culture which values people and references ritual and cultural practises. Culture and adult education has been integral to building an RSE team in which the workers have met many of their educational aspirations and the goals they set. Its evidence was apparent through a kainga which was active and functioning, workers subscribing to shared responsibility and collective values, culture was reinforced, wellbeing (physical and spiritual) was maintained, an ethic of care for the environment was always present, financial plans were followed and remittances were sent home. Capacity building occurred through adult education learning and skills transfer. Through the vaa, family and kāinga relationships were preserved bringing the triple win factor which the NZ RSE scheme boasts of employer, worker and sending country satisfaction.

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## Obrazovanje odraslih u okviru sheme kružne migracije. Studija slučaja sa Novog Zelanda

**Apstrakt:** Ovaj članak ispituje obrazovanje i učenje odraslih u sredini u kojoj poslodavci Maori zapošljavaju radnike iz pacifičke nacije Tonga u sklopu sezonskog programa zapošljavanja *Priznati sezonski radnici* (RSE), koji dopušta privremeni dolazak migranata za poslove u oblasti hortikulture i vinogradarstva, a prednost daje radnicima iz pacifičkih naroda. Maori su starosedeoci na Novom Zelandu, ali njihove istorijske veze sežu unazad do Polinezije i Pacifika pa stoga sa narodom Tonge imaju zajedničke narative iz prošlosti. Pristup sa studijom slučaja je upotrebljen da bi istakao na koji način je obrazovanje odraslih deo programa. Validacija i primena urođeničkih znanja i rituala su od ključne važnosti za uspeh ove studije slučaja.

**Ključne reči:** obrazovanje odraslih, obrazovanje u kružnoj migraciji, obrazovanje urođenika.

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## Older Adults in Public Open Spaces – Activities and the Role of Learning

**Abstract:** The paper deals with public open spaces as arenas, open for all inhabitants to share experiences beyond the sphere of their friends and family; they are not bound by age or any other characteristics. Public space is understood as a forum for social and personal change, where a system of relations is created, arising from acting, speaking and learning. The author analyses the differences between public and private spaces and evaluates the meaning of communicative action and learning in these spaces. These questions are analysed from the point of view of older people, who are strongly attached to the space and who are most likely to be interested in belonging to and bringing about proactive change in their living environment. The author offers a fresh reconsideration of the importance of learning in public space for older people and the role of the public adult educator in these processes.

**Key words:** community spaces, communication, bottom-up approach, older people, learning.

### Introduction

In this paper, I consider public spaces as open, everyday arenas where (older) people share experiences beyond their immediate circle of friends, family and age group. To understand the importance of bottom-up possibilities for the active societal involvement of older people in community spaces, it is vital to recognise public and private spaces, ways of performing, acting and communication in these spaces and processes of exchange and learning between people. I argue that learning in a public space is even more important for older than for younger age groups, mostly due to the stronger attachment of older people to spaces and their different needs connected to their living environment. An interdisciplinary

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approach to the research of learning in a public space is needed; findings from public sociology<sup>2</sup>, public pedagogy<sup>3</sup>, critical educational theory and gerontology, phenomenology, public geography, sociology of space<sup>4</sup>, to name a few, are intertwined.

### Space, time and place

Regarding the interrelation of space, time and place, a single explanation cannot be offered. There are multitudes of different terms connected with space and place, such as public sphere (Habermas), public domain (Marquant), public space (Arendt, Kohn), public place (Biesta), interspace (Arendt), social space (Lefebvre, Kohn), third space (Oldenburg), shared space, quasi-public space, micro-space (Mean and Tims), hook-up spot, creative non-governmental self-initiated scene, etc. In his rethinking of space, time and place, based on Marxist spatial theory, David Harvey (2011, p. 169) ascertains that the term 'space' includes numerous meanings and could be defined by:

1. 1) An understanding of space and time in a sense of absolute, relative and relational space;
2. 2) definitions of 'material space', 'representation of space' and 'spaces of representations'.

Ad 1) Absolute space is defined as unchangeable and static, as a frame in which objects, events and processes can be precisely identified by measurements. In a social sense, absolute spaces are exclusive spaces of private property; space and time are separate (Harvey, 2011, p. 173). Relative space is defined as the space of processes and movement and is measured by distances in this space; space cannot be understood separately from time (concept of space-time). In the third kind of space, relational space, processes form their own space and time. Space is not distinguishable from time; they are connected in spacetime, which includes the idea of internal relations (Harvey, 2011, p. 174). Harvey ascertains that relational space is a 'nobody's land', created by everybody included. In relational spacetime, identity has a different meaning as in absolute space or relative space-time; it

<sup>2</sup> Public sociology, advocated by Burawoy (2013; 2005), is understood as a dialogue between sociology and the public, a dialogue which deepens understanding of public issues on both sides. As opposed to mainstream sociology, public sociology tries not to be self-referential and dismissive of public engagement, but rather to use critical communicative methodology, to give voice to marginalised groups and to be close to social movements and discussions on power relations and activism.

<sup>3</sup> Public pedagogy is defined by Biesta (2012) as a "pedagogy of the public", which influences the quality of human togetherness.

<sup>4</sup> Sociology of space examines the social practices and material complexity of how humans and spaces interact.

becomes open, changeable, multiple and indefinite, it becomes 'non-material'. Harvey believes that space is neither absolute nor relative or relational, but it can become each or all; it is defined by human practice relating to space. Conflicts among different groups arise in absolute space and time, but relations among them become real in non-material relational spacetime, where they meet.

Ad 2) Lefebvre (2013) sees the societal production of space as a dialectical interaction between three factors: 'material space' (which is perceived by senses and is reproduced in everyday life), 'representation of space' (space as we imagine, as developed cognitively) and 'spaces of representation' (space as we experience) (Lefebvre, 2013, p. 54-55; p. 60-69). What Lefebvre calls 'spaces of representation', is connected to the way people live in spaces (Lefebvre, 2013, p. 61; Harvey, 2011, p. 181). For the matter of learning, Lefebvre's spaces of representation are the most important.

It is important how people understand space and time – are they victims of it or active composers of space? The understanding of space and time is currently mostly connected with the absolute dimension, which enables surveillance and control of 'free' liberal individuals; atomised and individualised citizens exist in the absolute theory of space and time. Some communities build a space in the sense of a bordered absolute space with certain rules of social participation, where the line between progressive communitarian policy and exclusionary and authoritarian practices can sometimes be very thin.

Areas traditionally deemed as public open spaces are high streets, street markets, parks, playgrounds and allotments; those and other public spaces provide the necessary bandwidth for the flow of information between people. They are spaces where people can learn who they live with, what others do and sometimes, if the space is open enough, what they think and dream of. The 'public sphere' is different from the private domain of 'love, friendship and personal connection' and from the market domain of 'buying and selling' (Marquand, 2004 in Biesta & Cowell, 2012, p. 49). In previous decades, private interests became aggressive intruders into public space; the result being that sometimes we cannot clearly divide public from private. There are new forms of governance, reconfiguring the collective life of towns; conventional public spaces, provided and run by the state are being supplemented and squeezed out by a wider mix of spaces with different governance arrangements (business parks, entertainment complexes) (Hall, 2012; Mean & Tims, 2005). Many of these look very much like conventional public spaces, but each carries a different set of expectations and obligations with implicit or explicit limits on who can use it and for what reason; communication is controlled, behaviour is under surveillance, and values are prescribed. Evidence

of the decline of public space is all around: gated communities, free speech zones, business districts etc. Hajer uses the term ‘tourist consumption’, as an explanation for how cities are changing their public spaces to spaces for ‘leisure trips’ (Hajer, 2004, p. 44). Places are integrated into an ‘experience market’, where all types of events are offered to excite people for a short time (festivals, biennales, various cultural events), but all mostly for the sake of social and cultural mobility (ibid, p. 49). In this sense, even culture is used for marketization of public spaces.

Kohn (2004) ‘upgrades’ the dichotomy of public open spaces (streets, plazas) and private, controlled spaces (homes, company offices) by developing the idea of social spaces, which mix aspects of public and private spaces (shopping centres, arts centres, car boot sales, markets etc.). In a social space (still privately owned) people are encouraged to congregate and interact, but this space is open to different limits and regulations. For example, in the USA, these limitations are enforced through many actions, such as with the ‘Occupy’ movement, where protestors ‘occupied’ privately owned public space (POPS) (Zuccotti Park); soon, private interests were explicitly protected<sup>5</sup> when the New York Supreme Court issued an injunction ruling against allowing protestors to camp or sleep in Zuccotti Park, and many protesters were arrested. This is not an isolated case<sup>6</sup>, therefore the question is: what will happen if more public spaces become private? What happens to space for free speaking and acting?

### Public open space – a venue for action and communication

Arendt (1996) speaks about public space as a condition of politics and as a space which enables the political; for her the most important misunderstandings concern the differentiations between private and the public in spaces (Arendt, 1996, p. 30). She defines something as being public by two phenomena:

1. In the sense that anyone can see and hear everything appearing before the public/community; anything that appears not to be important automatically becomes private;
2. The notion of public means the world alone, common to us all, and it is differentiated from the private. Public space as a common world

<sup>5</sup> The statement of the owner was: “Zuccotti Park is intended for the use and enjoyment of the general public for passive recreation”.

<sup>6</sup> For New York, Kohn (2004) stressed that “zoning laws gave developers of skyscrapers special incentives in exchange for building plazas and arcades. This has created a situation in which much of New York City’s public space is privately owned”.

gathers human beings together, and at the same time, prevents their mutual fragmentation.

Biesta (2012) talks about public places as those where things can be done without the need for anyone to give permission. It is the domain 'where strangers encounter each other as equal partners in the common life of the society' and where, by sharing experiences with people beyond their immediate circle of friends, family and work colleagues on a daily basis, they collectively define what the public interest is to be (Mean & Tims, 2005, p. 16). Findings from phenomenological and ethnomethodological research help in understanding learning processes through communication in public (open) spaces. In ethnomethodology, social structures, cultural meanings and values are understood as products of social interaction and conversation. Arendt (1996) defines it as un-institutionalised freedom and a kind of communicative action, happening through speaking. Quality of speaking and acting is present only where people speak and act together and not for or against one another. Also, Habermas set the question of communication as the core of the theoretical model of society, which is based on the theory of communicative action; he connects the individual observer, actor and speaker, with other observers, actors and speakers in the field of intersubjectivity. This offers understanding of the role of social context for communication processes and the position of individuals in this interaction (Škerlep, 1997, p. 156). The linguistic turn that Habermas gave to critical theory offers an understanding of the nature of intersubjectivity, with which participants' interaction with one another explains their mutual interpretations of social situations (Habermas, 1984, 2001, xi). The individual is actually not isolated, but initially involved in interpersonal relations, in which he/she is defined as a personality and actively participates as a subject. Public space is an inner space where people follow their interests ('inter-est') and disappears no earlier than when the people who establish it disappear, and the activities which define the space stop (Arendt, 1996, p. 189, 210-211). Public open spaces, filled with diverse people and uncontrolled events, therefore provide communicative and learning experiences, forcing us to move beyond the self and consider the plight of the other. Defence of public space in the name of the social good it provides through fostering mutual cooperation and learning, exchange of ideas and knowledge, is crucial; public open space is a forum for social and personal change, a 'transitional space' (Bourgeois, 2002; Wildemersch, 2012). It is a system of relations, arising from acting, speaking and learning; Arendt (1996, 190) called this the web of human matters. As Torres (2013, p. 62) ascertains, through public space, people fight for recognition, social justice, the spirit of solidarity, and individual and collective well-being; they de-

find the principle of citizenship education and learning instead of the principle of consumerism.

But in his analyses, Habermas (1989, p. 181) shows that with the development of commercial mass media in the 20<sup>th</sup> century, the publicum shifted from being an active subject to being a passive object. Societal discussions are withdrawing and giving way to non-binding group activities, a form of non-formal common dwelling without a specific power in public communication, without the need for continuation of discussions (Habermas, 1989, p. 182). This is a substitute for action, initiated by people themselves, which lost its public function and is in this sense a top-down approach (Habermas, 1989, p. 183).

However, the transformative power of progressive social movements, arising in public space, their educational practices, oriented against the neoliberal globalization, hegemony of economy and privatisation, or just struggling 'for a better world', brings hope for social justice and social change in our society. Learning is intrinsically connected to social movements as a two-way process that demands action, critical reflection on social action and public discourses on policy, economic, cultural and education issues. It is connected to ideas of radical education, strongly advocated by Gramsci and Freire, who connect knowledge, culture and power (Kump, 2012; Borg et al., 2002; McLaren, 2000). There are different approaches and learning contexts in social movements, but dialogue in a public space is a central element. For example, in the 'Occupy' movement, when creating new physical, political and intellectual spaces, learning, collective thinking and active listening were central (Hall, 2012); similarly, at the University of Ljubljana at the time of the 'occupation' of the Faculty of Arts in December 2012, teachers and students organised lectures and debates in public spaces through 'events' titled 'Knowledge on the Streets'. Common to different movements is the struggle for more solidarity and an attempt to emphasise the importance of active, open and democratic communication in space in which freedom is provided. Participants are teachers and learners at the same time.

### **Older people and social interaction in public spaces**

One of the findings in social gerontology is the decrease in social interaction in old age (Baltes & Carstensen, 1999). Early studies suggest that this decrease in social interaction was societally induced (mandatory retirement, ageism) or was a consequence of psychological withdrawal between the older person and society (Dalley et al., 2012; Merriam & Kee, 2014; Harris, 2007; Estes et al., 2003). More recent studies reject the disengagement theory and put to the forefront the

activity theory, continuity theory and a concept of productive ageing (Merriam & Kee, 2014), which are very much connected with the concept of 'ageing in place'. Bauman (2002) stresses that if other age groups are expected to 'run away' or 'avoid' their immediate space, for older people the opposite is true; they are most often bound to the space in which they live. Environmental gerontologists, who deal with the interdisciplinary understanding of the person-environment interchange processes in ageing (Wahl & Oswald 2013, 112), assert that as people age, they become increasingly attached to the place where they live, spend most of their time (about three-quarters of their daytime) in the home and immediate home environment, and concurrently also become more sensitive to their social and physical environment (Wahl & Oswald, 2013, p. 112; Iecovich, 2014, p. 24; Phillipson, 2013, p. 600). They expose the term 'physical-social' environment to acknowledge "there is no 'objective' environment 'out there' without social interpretation, cultural meaning, ongoing historical reassessment and Zeitgeist influences" (Wahl & Oswald, 2013, p. 112).

The concept of 'ageing in place' speaks to the ability of older people to maintain independence and activity in their living environment, which influences their quality of life and perception of it (Iecovich, 2014). The result of the study (Wiles et al., 2011 in Iecovich, 2014) which examined how older people perceive ageing-in-place, shows that they understand it as having choices about their living arrangements, good access to amenities, maintaining social connections and interaction among locals, feeling safe and having a sense of security and autonomy at home and in the community. When older people live in their homes for many decades, it leads to place identity, and it directly influences improvement in quality of life in old age. In this sense attachment to a place with older people is related to three dimensions: a) physical insideness (living somewhere for long periods of time develops a sense of environmental control); b) social insideness (social relationships with others, being known and knowing others); c) autobiographical insideness (self-identity, based on older people's attachment to a place due to memories) (Rowles, 1978; 1983 in Iecovich, 2014, p. 24). Phillipson (2013, p. 600) ascertains that intensification of feelings about spaces is, for older people, one of the most important factors of maintaining a sense of identity within a changing environment. From this point of view, the retaining of public spaces on one side, and the active involvement of older people in communication with other age, cultural, ethnic etc. groups in those spaces in community on the other, is vital for quality of life.

Quality of life as a dynamic, multifaceted and complex concept reflects the interaction of objective and subjective, macro and micro, positive and negative influences; it involves a combination of life-course factors and immediate

situational ones (Walker, 2013, p. 575). As Wiggins' research shows (in Walker, 2013, p. 575), the influence of network relationships may be greater than life-course ones. Some research (Kump & Jelenc Krašovec, 2014; Montross et al., 2006; Walker, 2013; etc.) has shown that some objective factors, amongst them possibilities for social participation, can influence the self-assessed well-being of older people. Compared to younger generations, older people have more time, they place greater value on social contacts and need them for a sense of self-realization; they may need help or are ready to offer help to others and may be more interested in proactive use and creation of a physical-social environment due to strong attachment to the space. A model, presented by Wahl and Oswald (2013, p. 114), is based on the complexity of person-environment dynamics, referring to two key processes of person-environment interchange: belonging<sup>7</sup> and agency<sup>8</sup>. The model simultaneously considers "autonomy, identity and well-being as major endpoints of a person-environment interchange as people age", which differs from traditional approaches in environmental gerontology, focusing only on one of those three dimensions at a time (Wahl & Oswald, 2013, p. 114). It seems the most important are processes of 'agency', because they assume that older adults may strive proactively to change living conditions according to their own wishes and needs and to gain from environmental opportunities (ibid., 116). However, if exclusion happens, it is most likely a multidimensional phenomenon composed of neighbourhood exclusion and exclusion from material resources, social relations, civic activities and basic services (Wahl & Oswald, 2013, p. 118).

It is often presumed that most older people are frail and dependent (Merriam & Kee, 2014; Formosa, 2012), but there are large variances among older people in terms of their inclinations to engage with public spaces. Many older people congregate in different public spaces on a daily basis, and for many, especially widowed or solitary older people, this could indeed be the only social activity during a given day or week. But in Western societies, many older people tend to travel extensively or even move in their later years. Those older people have a different set of expectations and way of life, which may be more similar to the lifestyle of younger generations<sup>9</sup>.

Another factor concerns poverty; although some data show that older people (in 2012) faced a lower risk of poverty than the overall population at EU-28 level (19.3 % as opposed to 24.8 %) (Eurostat, 2014), more and more old people,

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<sup>7</sup> Belonging entails mainly cognitive and emotional evaluation and representation of physical environments, also attachment to places accounts for a full range of experiences.

<sup>8</sup> It emphasises the full range of goal-directed cognitions, behaviours and social practices.

<sup>9</sup> Modern cities are otherwise characterised by contradictions between the demands of a 'hyper-mobile' (younger) professional minority and groups of older people (those ageing in place) (Phillipson, 2013, p. 598).



particularly in some countries, live in poverty (especially older women and the very elderly). Nevertheless for some older people, cafés and tearooms are of the greatest importance, even though only a minority of older people can afford to spend money in cafés; this reflects the important role of public spaces (like markets) in providing a socially inclusive space for people on lower incomes (Watson & Studdert, 2006, p. 18). Many older people sit for long periods of time on circular benches around flower beds or in other formal seating areas, but informal seating areas also appear to be significant sites of social interaction for older people. Older people use public spaces in interconnection with the opportunity to use other amenities, in particular all-purpose shops, health centres, public libraries, post offices and community facilities; many cannot walk long distances, so they gather (and talk) near facilities they must use on a daily basis.

We can agree with Phillipson (2013, p. 602), that a solid future for the older aged will strongly depend on the extent to which living in the community is a tolerable and enjoyable experience for different age and social groups; interaction is crucial for empathy and solidarity between them.

### **The role of learning in public spaces**

Research on the topic shows there is little emphasis on older people's learning in public spaces. Some studies stress the importance of learning for the independence of older adults, their healthy living style, active participation in a civil society and fostering personal growth in the later years (Dye, Willoughby & Battisto, 2011; Plath, 2009). The learning process in public spaces is an opportunity for self-reflection, perspective transformation and a chance to address community problems by using the public space as a free environment for the struggle against all forms of regulation and control. Educational environments in educational institutions emphasise the notion of power, prescribed goals and authoritarian relations (Torres, 2013, p. 26), but learning in public spaces is the opposite: emancipatory, democratic, civic and bottom-up. Public spaces, as compared to traditional (structured, regulated) learning environments, are changeable, open and created through discussion and formed by people involved in public spaces, which suits many older people. Learning is unpredictable, multi-layered, and in a sense, more demanding, because the course and its results are dependent on a participant's skills to perform it; but it is natural, experiential and based on the problems of the participant, so it is far less stressful than education in organised forms, which is subject to evaluation and measurable results. Therefore such learning: a) can have a therapeutic role (in the sense of encouraging mental

and physical activity); b) can have an extremely important emancipatory role; c) can encourage older adults to retain control over their own lives and possibilities (Glendenning & Battersby, 1990); d) can be empowering, transformative, liberating and transitional (Torres, 2013; McLaren, 2000; etc.); e) has the potential to be an activity for development of critical consciousness (Freire, 1970; 1994), contributing to empowerment of community members; f) and, finally, offers a new chance to avoid the isolation and despair which is typical for many older people. We can agree with the arguments of Mezirow (1997) and Illeris (2009) that learning has cognitive, emotional and social dimensions, important in learning processes in public spaces. To be a part of the speaking and acting process in public spaces, one has to have will, desire and certain skills, which can be learned only through the democratic process itself. Learning experiences in a public space are not always comfortable or joyful; they can be defined by hesitation, disjunction, discontinuity and conflict between participants (Wildemersch, 2012).

There are arguments (Biesta, 2014; Biesta & Cowell, 2012) that learning in a public sphere (space) could be defined as civic learning; this refers to processes and practices of learning that happen in the public sphere and can be understood “in a way that strives for a single-voice consensus and in a way in which such learning processes remain tied to a democratic commitment to plurality and difference” (Biesta & Cowell, 2012, p. 48). Skills of interaction with others are most needed for negotiations and conducting dialogue; they enable the translation of private issues/interests into public/common concerns. In the neighbourhood we mix and we learn from and through this diversity.

Learning in a public space could also be defined by theories of transformative learning. Transformative learning is a very demanding type of learning which involves personality changes, changes in the organisation of the self and restructuring of learning and living patterns (Illeris, 2009, p. 14). Mezirow (1997) stresses that transformative learning can take several forms involving either objective or subjective reframing. It is rooted in the way human beings communicate and is a common learning experience, which involves learning to make “our own interpretations rather than act on the purposes, beliefs, judgments, and feelings of others” (Mezirow, 1997, p. 5). In the opinion of Mezirow, this is one of the most important goals of adult education. As mentioned, a trusting social context, which enables dialogue and reflective discourse, is needed (Mezirow, 2000); if circumstances are favourable, these goals could be realised by learning in public open spaces. Such learning gives us a voice, an ability to name the world, and consequently, construct the meaning of the world for ourselves (Dirkx, 1998). This could be, by definition, at the core of learning in public spaces, which is open, unstructured, free space.

The idea is basically congruent with ideas of critical pedagogy, advocating dialogical and dialectical process between involved participants, or even revolutionary pedagogy, creating a narrative space, where subjectivity is constantly dissolved and reconstructed (McLaren, 2000). Bauman (2005, p. 23) believes that such learning is a lifelong learning process of “rebuilding of the now increasingly deserted public space, where men and women may engage in a continuous translation between individual and common, private and communal interests, rights and duties”..

## Conclusion

Public spaces play a vital role in the social life of communities. Older people are very much involved and have a right to a place in the public space, but the role of learning is less clear. The idea of public pedagogy<sup>10</sup> (Biesta, 2012; Biesta & Cowell, 2012) would have to be further developed as a public andragogy or public educational gerontology to influence learning by older adults in public spaces. Biesta proposes that the public pedagogue should somehow enter this space, yet not as an instructor, teacher or facilitator of learning, but as somebody who would interrupt and “keep open the possibility of a space where freedom can appear” (Biesta, 2012, p. 693). It is my conviction that top-down interventions in the public space, in the sense of educational interventions, should be as low-key as possible (or limited to certain events, places and part-time interventions); however, the discussion on the importance of the preservation of the public space, critical debates and resistance against the marketisation and privatisation of the space, should be encouraged in the professional and public sphere. Public adult educators should have interdisciplinary knowledge – besides critical educational theory – about urban sociology, critical public sociology, critical educational gerontology, public geography and sociology of space, to mention a few. A public adult educator could be, similar to a public sociologist (defined by Burawoy, 2013), one who speaks and listens, but also learns and writes about the importance of preservation of public space and learning through open communication. He/she should keep their distance from the market and the state, avoid institutionalised ways of thinking about learning and education, and somehow preserve the critical stance towards political and economic influences; he/she has to show moral responsibility and political commitment to create a sphere of public debate, as Torres (2013, p. 79) has also suggested. These ideas are close to the theories on

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<sup>10</sup> Biesta defined public pedagogy as “a pedagogy of the public and as the enactment of a concern for the public quality of human togetherness” (Biesta, 2012, p. 683)

the role of public intellectuals in reinforcing learning in social movements, who advocate autonomous learning, self-organisation of learning and open and transgressive learning (Hall, 2012, p. 134).

Research on the importance of learning in public spaces for both older and younger people, should be fostered and supported. This is vital for greater solidarity and a hopeful society for all, especially for those sliding towards despair (Freire, 1994). There are some such examples and initiatives in the field of adult education, which have been analysed and reported on elsewhere (like the Permanent Breakfast (<http://www.permanentbreakfast.org/>), Live Courtyards (<http://www.ziva-dvorisca.si/en>), The Community Walking Project (Biesta & Cowell, 2012), Personal TownTours (Kutin, 2014) and other research on the importance of public space as a space for learning and socialising (Mean & Tims, 2005; Watson & Studdert, 2006; Wildemeersch, 2012; etc.). However, there is a lack of research from the point of critical educational gerontology. More ethnomethodological research on learning in public spaces is needed in order to build stronger arguments for answering questions such as: what does public space offer to older people and what is their connection with other age groups in public space? Is public space, as Bourgeois said (2002), the 'secure space', where an individual can experience new ways of thinking and acting without risk to her/his identity? Does knowledge, achieved through confrontation of beliefs and ideas, offer an individual the possibility to reflect on his/her own world? What is the role of older people in social movements?

More focus is therefore needed on individual and societal changes in the second half of life at the micro and macro levels, but also on changing living conditions and opportunities to find how older people subjectively perceive it and adapt to it (Walker, 2013, p. 581). This is crucial for further rethinking on the importance of making public (open) space alive and available for different age groups, including older people.

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## Stariji odrasli u otvorenim javnim prostorima – aktivnosti i uloga učenja

**Apstrakt:** Rad obrađuje temu javnih prostora kao arena otvorenih za sve građane, gde je moguće razmenjivati iskustva koja nisu nužno vezana za prijatelje i porodicu, bez ograničenja kad je reč o starosnom dobu ili bilo kojim drugim karakteristikama. Javni prostor se smatra forumom za društvene i lične promene, mestom gde se stvara sistem odnosa koji je posledica delanja, govorenja i učenja. Autor analizira razlike između javnih i privatnih prostora i ocenjuje značenje komunikacije i učenja u njima. Pitanja su analizirana sa gledišta starijih ljudi, koji su snažno povezani sa prostorom i koji su najčešće najviše zainteresovani za to da budu deo svog okruženja i da ga menjaju. Autor iznova razmatra koliko je učenje u javnom prostoru značajno za starije ljude i kakvu ulogu u tom procesu imaju nastavnici u obrazovanju odraslih.

**Ključne reči:** prostori zajednice, komunikacija, bottom-up pristup, stariji ljudi, učenje.

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## Organizaciona subkultura i obrazovanje zaposlenih<sup>3</sup>

**Apstrakt:** Namera istraživanja čije rezultate prezentujemo u ovom radu bila je da se utvrdi povezanost obrazovnih karakteristika zaposlenih sa njihovom pripadnošću određenoj organizacionoj subkulturi. U okviru kvalitativne istraživačke paradigme korišćen je model singularne studije slučaja. Podaci za analizu su prikupljeni tehnikama fokus-grupnog intervjuisanja, anketiranja, skaliranja i analizom dokumentacije. Analiza i interpretacija istraživačkih nalaza pružila je empirijsku podršku postavljenoj hipotezi, kojom tvrdimo da postoji povezanost između obrazovnih karakteristika zaposlenih i organizacione subkulture.

**Ključne reči:** organizaciona kultura, organizaciona subkultura, obrazovanje zaposlenih.

### Uvod

Koncept organizacione kulture svoje izvore ima, pre svega, u antropologiji, ali i drugim naučnim disciplinama i oblastima, kao što su sociologija, socijalna psihologija, politikologija i ekonomija. Iako se implicitno nalazi u radovima starijih autora (kao npr. „princip duha firme“), organizaciona kultura se prvi put jasno artikulise tek 1979. godine kao reakcija na neverovatan uspeh japanskih preduzeća, koji se dešavao u to vreme (Miljković, 2008). Pod pojmom *organizacione kulture* podrazumevamo „sistem pretpostavki, verovanja, vrednosti i normi ponašanja koje su članovi jedne organizacije razvili i usvojili kroz zajedničko iskustvo i koji usmeravaju njihovo mišljenje i ponašanje” (Janićijević, 1997, str. 207).

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Značaj organizacione kulture za funkcionisanje organizacije je veliki. Ona deluje na različite aspekte funkcionisanja organizacije, a njen uticaj je, prema Mojiću (2010, str. 114–115), najviše proučavan u sledećim oblastima:  *donošenje strateških odluka, prilagođavanje promenama u okolini, procesi koordinacije u organizaciji, kontrola ponašanja članova (zaposlenih), smanjivanje sukoba u organizaciji, motivisanje zaposlenih*. Odnos između obrazovanja i učenja koje se odvija u organizacijama i organizacione kulture „može se sagledati u najmanje dve dimenzije: učenje kao preduslov nastanka, održanja i menjanja organizacione kulture i kultura koja stvara povoljnu klimu za javljanje i razvoj učenja i obrazovanja u organizaciji, odnosno kultura čiji je jedan od bazičnih sadržaja (vrednosti) učenje“ (Miljković, 2008, str. 154). Međutim, organizaciona kultura nije monolitan fenomen. Pre možemo govoriti o dominantnoj organizacionoj kulturi u okviru koje postoje brojne subkulture<sup>4</sup>, nego o jedinstvenoj kulturi koju dele svi zaposleni (Reynolds, 2010).

Organizaciona subkultura predstavlja „specifičan sistem pretpostavki, vrednosti, verovanja, normi i simbola koje deli jedna manja grupa zaposlenih u organizaciji“ (Janićijević, 2008, str. 315). Ono što možemo primetiti jeste da je definicija organizacione subkulture gotovo identična definiciji organizacione kulture, sa jednom bitnom razlikom: sve navedene odrednice organizacione subkulture vezane su za *manju* grupu zaposlenih koja funkcioniše u kontekstu *dominantne* kulture organizacije, prema kojoj svojim sadržajem može biti podržavajuća, ali i potpuno suprotstavljena. Članovi *podržavajuće* subkulture privrženi su dominantnim organizacionim vrednostima, i to više nego ostali zaposleni, a same vrednosti su snažnije, jednostavnije i čistije. Pripadnici *kontrakulture* razvijaju vrednosti i verovanja koja su potpuno suprotna vrednostima i verovanjima dominantne kulture, a njeni pripadnici su najčešće nosioci promena dominantne organizacione kulture. Martin i Siehl (prema: Boisnier, Chatman, 2003, str. 10) dodaju i treći mogući odnos organizacione subkulture prema dominantnoj kulturi – *ortogonalni*. Pripadnici *ortogonalne subkulture* prihvataju vrednosti dominantne kulture, mada usvajaju i set različitih, ali ne i konfliktnih vrednosti. Ova subkultura ne ugrožava kohezivnost sveobuhvatne organizacione kulture.

Subkultura se može formirati prema različitim kriterijumima: polu, uzrastu, profesiji, društvenom položaju i statusu itd., ali vredi naglasiti da je ne može činiti skup malobrojnih i izolovanih kulturnih karakteristika, već da ona predstavlja skup specifičnih kulturnih crta koje formiraju relativno kohezivne kulturne sisteme (Komarowsky, Sargent, prema: Ilić, 1974: 15). Očigledno je da

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<sup>4</sup> Termin subkultura je rasprostranjen u srpskoj naučnoj javnosti, pa se i u ovom radu koristi u tom obliku. Pravopis nalaže da se izvrši jednačenje po zvučnosti (supkultura), od čega smo svesno odustali.

organizacione subkulture, tamo gde postoje, mogu već navedenim mehanizmima organizacione kulture imati značajan uticaj na obrazovanje i učenje zaposlenih.

Prema Janićijeviću (1997, str. 100), organizacione subkulture se prema pravcu prostiranja mogu izdiferencirati na: horizontalnu, vertikalnu i dijagonalnu. Po *horizontalnoj* liniji se mogu izdiferencirati subkulture poslovnih funkcija (proizvodnja, komercijala, finansije i računovodstvo, istraživanje i razvoj). One imaju različite ciljeve, tehnologiju rada, profil i nivo obrazovanja zaposlenih, različitu ulogu u preduzeću, različite perspektive poslovanja preduzeća i probleme, što dovodi do nastanka više subkultura u organizaciji, a najčešće do kristalizacije proizvodne, komercijalne i istraživačke subkulture. Iako međusobno različite, ove subkulture unutar sebe obuhvataju i sumu zajedničkog znanja, koje ne mora biti eksplicitno iskazano, a koje se stiče kroz participaciju u zajedničkoj subkulturama. Po *vertikalnoj* liniji u organizaciji se mogu izdiferencirati subkulture viših i nižih organizacionih delova, pa se tako mogu izdiferencirati subkulture menadžera i radnika. Čini nam se da menadžerska subkultura može obuhvatati više zajedničkih znanja, jer ih objedinjuje identična funkcija upravljanja, dok bismo za radničku subkulturama vezali više zajednička uverenja i vrednosti, jer se radi o ljudima koji imaju sličan status, ali obavljaju različite poslove. Po *dijagonalnom* pravcu, subkulture se mogu izdiferencirati prema različitim kriterijumima: prema profesiji i obrazovanju, nacionalnoj pripadnosti, interesovanjima i sl. Smatramo da je ovaj pravac bremenit kako znanjima tako i vrednostima i stavovima, jer se radi o vrlo kompleksnim kategorijama (nacija, religija, profesija).

Prema istraživanjima koje je sproveo Schein (2004: str. 197), tri generičke subkulture koje su neophodne svakoj organizaciji kako bi preživela su: *operativna*, *inženjerska* i *izvršna subkultura*. Operativnu subkulturama čine neposredni izvršioци posla, dok inženjerska subkultura obuhvata sve one zaposlene čiji je posao dizajniranje proizvoda i procesa rada, i koji su zaduženi za inovacije, unapređenje i redizajn u organizaciji. Njih na okupu drži izvršna subkultura, čiji je osnovni zadatak ne samo da osigura opstanak organizacije u finansijskom smislu nego i integrisanje ili barem usklađivanje operativne i inženjerske subkulture kako bi se obezbedila dugoročna efektivnost. Ova podela, koja je prema našem mišljenju jednostavnija od one koju je predstavio Janićijević, nije u suprotnosti sa njom, već je komplementarna i ukazuje na kompleksnost fenomena organizacione subkulture i različitih generičkih tačaka oko kojih se može kreirati.

Članovi organizacije često pripadaju različitim organizacionim subkulturama. Zaposleni, kao kompleksno biće, može pripadati istovremeno i onim subkulturama čije su centralne pretpostavke, vrednosti i verovanja međusobno suprotstavljene (Keyton, 2011, str. 61).

Čini nam se da se u svim navedenim podelama organizacionih subkultura obrazovanje i učenje javljaju kao bitan činilac, koji usmerava zaposlenog ka pripadnosti određenim organizacionim subkulturama. Oni mogu biti osnovna osa oko koje se generiše organizaciona subkultura (npr., zaposleni koji imaju formalno obrazovanje iz oblasti prava ili ekonomije mogu na osnovu toga razviti vlastitu subkulturu, koju će kasnije dalje razvijati i učenjem usvajati), ali mogu biti i samo mehanizam usvajanja elemenata subkulture koja se javlja na osnovu nekih drugih bioloških ili socijalnih datosti (pol, rasa, geografsko, religijsko ili nacionalno poreklo) ili više-manje slobodnih izbora (hobi aktivnosti, politička pripadnost). Takođe, postoji velika mogućnost da učenjem i obrazovanjem učvršćena pripadnost određenim subkulturama znatno utiče na obim, sadržaj, frekvenciju, oblike i nivo daljeg obrazovanja i učenja zaposlenih. S obzirom na višestruke veze između obrazovanja i učenja i fenomena organizacione subkulture, smatramo da je potrebno empirijskim putem dalje istraživati ovaj kompleksan odnos, pa smo s tom namerom sproveli istraživanje čije rezultate predstavljamo u ovom radu.

### Metodološki okvir istraživanja

*Predmet* ovog istraživanja jeste odnos između obrazovanja zaposlenih i organizacione subkulture. *Cilj istraživanja* je ispitati postojanje subkultura i njihovih karakteristika u Termoelektrani „T”, kao i njihovu povezanost sa obrazovnim karakteristikama zaposlenih. Cilj je operacionalizovan pomoću dva zadatka: 1) utvrditi postojanje subkultura i njihovih karakteristika; 2) utvrditi povezanost obrazovnih karakteristika ispitanika sa pripadnošću organizacionim subkulturama.

*Opštom hipotezom* tvrdimo da postoji povezanost između obrazovnih karakteristika zaposlenih i organizacione subkulture. U metodološkom dizajnu našeg istraživanja dve su dominantne varijable: *organizacione subkulture* i *obrazovanje zaposlenih*.

Na osnovu Janićijevićeve (1997, str. 100) horizontalne diferencijacije *organizacionih subkultura* (prema kriterijumu poslovnih funkcija) na proizvodnu, komercijalnu i istraživačku subkulturu i upoznatosti sa karakteristikama i strukturom organizacije u kojoj će istraživanje biti sprovedeno, pretpostavljeno je da će u Termoelektrani „T” biti identifikovane tri subkulture: *proizvodna*, *birokratska* i *inženjerska* subkultura. Identifikovanje karakteristika organizacionih subkultura, kao prve varijable istraživanja, izvršeno je na osnovu tri indikatora: *organizacionih vrednosti*, *lokusa kontrole sopstvenog položaja u organizaciji* i *percepcije zaposlenih o praksi organizacije u kojoj rade*. U okviru indikatora organizacionih vrednosti, razlikujemo četiri dimenzije koje je identifikovao Hofstede (prema: Janićijević,

1997, str. 208): 1) distanca moći, 2) izbegavanje neizvesnosti, 3) individualizam-kolektivizam i 4) „muške“ nasuprot „ženskim“ vrednostima. U okviru indikatora lokus kontrole sopstvenog ponašanja u organizaciji postoje dve moguće dimenzije: 1) unutrašnji i 2) spoljni lokus kontrole. U okviru indikatora percepcija zaposlenih o praksi organizacije u kojoj rade, prihvatili smo podelu koju je dao Hofstede (prema: Jenkić, 2011: 114) na šest dimenzija koje opisuju organizacione subkulture: 1) orijentacija na proces i orijentacija na rezultate, 2) orijentacija na zaposlene i orijentacija na posao, 3) parohijalni i profesionalni identitet zaposlenih, 4) otvoreni i zatvoreni sistem, 5) blaga kontrola i čvrsta kontrola i 6) normativni tip i pragmatični tip.

*Drugu varijablu* u istraživanju predstavlja *obrazovanje zaposlenih*. Ovu varijablu smo operacionalizovali preko šest indikatora/karakteristika: 1) *obim (kvantitet) obrazovanja zaposlenih* (koliko su često zaposleni, pripadnici različitih subkultura, participirali u nekoj obrazovnoj aktivnosti u periodu od poslednjih pet godina), 2) *mesto obrazovanja zaposlenih*, 3) *sadržaj obrazovanja zaposlenih*, 4) *organizacioni oblici u kojima se obrazovanje zaposlenih odvija*, 5) *motivi za obrazovanje zaposlenih*, 6) *barijere za obrazovanje zaposlenih*.

Što se tiče *populacije istraživanja*, ona je konačna, a čine je svi zaposleni u Termoelektrani „T“ na dan istraživanja, i obuhvata oko 2500 zaposlenih osoba. *Uzorak istraživanja* je prigodan u okviru stratuma, a stratifikacija je izvršena na osnovu pripadnosti poslovnim funkcijama. Obuhvatao je ukupno 47 zaposlenih koji obavljaju posao u različitim službama, odnosno sektorima u Termoelektrani „T“.

Problem je istraživani empirijski, primenom kvalitativne singularne studije slučaja, s tim što smo imali u vidu i prednosti, ali i ograničenja ovog modela istraživanja. Od istraživačkih tehnika korišćeno je fokus-grupno intervjuisanje, anketiranje, skaliranje i analiza dokumentacije. Od instrumenata korišćeni su vodič za fokus grupe i baterija instrumenata sastavljena od upitnika i skale Likertovog tipa. Fokus-grupnim intervjuom je izvršeno prikupljanje podataka o karakteristikama subkultura u organizaciji. Intervju je služio za prikupljanje podataka o tri indikatora organizacionih subkultura i to: organizacionih vrednosti (pitanja za ovaj indikator su formulisana po ugledu na međunarodni upitnik VSM 94 [*Values Survey Module*], koji je koristio Hofstede), lokus kontrole sopstvenog položaja u organizaciji (utvrđen je pitanjima iz upitnika LOKOP-02, koji su konstruisali Čukić, Kurbajlija i Kosanović<sup>5</sup>) i percepcije zaposlenih o praksi organizacije u kojoj rade (pitanja su konstruisana na osnovu šest dimenzija organizacionih praksi koje su Hofstede i saradnici identifikovali istraživanjem u dvadeset homogenih

<sup>5</sup> Za potrebe istraživanja u okviru projekta „Psihološki regulativi integrisanja dezintegrisanih ljudskih resursa privrede u tranziciji“.

organizacionih jedinica u Danskoj i Holandiji tokom 1985. i 1986. godine). Upitnikom iz baterije instrumenata su utvrđene sve obrazovne varijable, osim samoprocene sposobnosti za učenje (koja predstavlja jedan od indikatora obrazovnih barijera), koja je utvrđena skalom procene Likertovog tipa.

Istraživanje je sprovedeno tokom 2013. godine. Obrada podataka obuhvatila je računanje frekvencija, kada su u pitanju podaci prikupljeni baterijom instrumenata, kao i analizu i interpretaciju sadržaja, u slučaju podataka prikupljenih fokus-grupnim intervjuom.

## Analiza i interpretacija rezultata istraživanja

### *Karakteristike subkultura u Termoelektrani „T”*

Kvalitativnom analizom podataka prikupljenih fokus-grupnim intervjuom, u Termoelektrani „T” identifikovane su karakteristike tri organizacione subkulture: *proizvodne, birokratske i inženjerske*. One su predstavljene u Tabeli broj 1.

### *Proizvodna subkultura u Termoelektrani „T”*

Karakteristike ove subkulture u organizaciji utvrđene su na uzorku od 19 ispitanika koji su intervjuisani u tri odvojene fokus grupe, a koji su zaposleni u Sektoru proizvodnje i Sektoru održavanja Termoelektrane „T”. U svakoj od ovih grupa ispitanici su se razlikovali po starosti, godinama radnog staža i godinama provedenim u organizaciji, ali su bili istog pola (muškog) i istog stepena obrazovanja (završena srednja škola).

**Tabela 1:** Karakteristike organizacionih subkultura u Termoelektrani „T”

Subkulture	Proizvodna	Birokratska	Inženjerska
Percepcija zaposlenih o praksi organizacije u kojoj rade			
orijentacija na proces/rezultate	na rezultate	na proces	na rezultate
orijentacija na zaposlene/posao <sup>o</sup>	na posao	na zaposlene	na zaposlene
parohijalna/profesionalna	parohijalna	parohijalna	profesionalna
otvorena/zatvorena	otvorena	otvorena	otvorena
blaga/čvrsta kontrola	srednja	blaga	blaga
normativna/pragmatična	normativna	normativna	normativna
Organizacione vrednosti			
distanca moći	visoka	na sredini dimenzije	niska

Subkulture	Proizvodna	Birokratska	Inženjerska
izbegavanje neizvesnosti	visok nivo	visok nivo	visok nivo
individual./kolektiv.	kolektivizam	kolektivizam	individualizam
muške/ženske vrednosti	ženske	ženske	ženske
<b>Lokus kontrole sopstvenog položaja u organizaciji</b>			
karijera	spoljašnji i unutrašnji	Spoljašnji	unutrašnji
Zarada	unutrašnji	Spoljašnji	unutrašnji
profesionalni ugled	unutrašnji	spoljašnji i unutrašnji	unutrašnji
podrška organizacije	spoljašnji	Spoljašnji	unutrašnji

Procenjivanjem *percepcije zaposlenih o praksi organizacije u kojoj rade* zaključili smo da *proizvodna subkultura* nije orijentisana na proces, već je orijentisana prema rezultatima. Svi ispitanici pripadnici *proizvodne subkulture* su saglasni da ne doživljavaju svaki dan na poslu kao isti i da su se navikli na promenljive i stresne situacije na poslu, što i odgovara prirodi posla kojim se ovi zaposleni bave.<sup>6</sup> Smatraju da ulažu maksimalan napor u obavljanje svakodnevnog posla, ali i da su se na takav zahtevan posao navikli, da su dobro obučeni da reaguju u različitim situacijama, a da su im reakcije postale mehaničke. Daljim procenjivanjem *percepcije zaposlenih o praksi organizacije u kojoj rade* utvrdili smo da je *proizvodna subkultura* orijentisana na posao. Pripadnici ove subkulture smatraju da organizacija ne brine u dovoljnoj meri o njihovim ličnim problemima i da se vrši snažan pritisak na zaposlene kako bi posao bio obavljen. Smatraju da, ukoliko bi iskazali svoje nezadovoljstvo, reakcija organizacije bi ili izostala ili bi bila neodgovarajuća. Takođe smatraju i da njihove službe ne raspolažu dovoljnim brojem zaposlenih, pa su radnici previše opterećeni, a da se njihovo zalaganje ne ceni u dovoljnoj meri i da nisu adekvatno nagrađeni za trud koji ulažu u obavljanje posla. U njihovim organizacionim jedinicama važne odluke donose isključivo šefovi, koji se prethodno ne konsultuju sa zaposlenima.

*Proizvodna subkultura* se pokazala više kao *parohijalna* nego kao *profesionalna*, ali odgovori ispitanika nisu bili u potpunosti usaglašeni. Ono oko čega su ispitanici saglasni je to da se u njihovoj organizaciji ljudi ne zapošljavaju samo na osnovu kvalifikacija i sposobnosti već i na osnovu drugih faktora. Međutim, potpuno suprotni odgovori mlađih i starijih ispitanika zabeleženi su na druga dva pitanja povezana sa ovom dimenzijom. Stariji ispitanici, koji su pred penzijom,

<sup>6</sup> Zaposleni iz Službe proizvodnje prate proces proizvodnje električne energije u Termoelektrani „T“. Nadgledajući proizvodni pogon, ovi radnici su u obavezi da primete svaku promenu u radu i otklone manji kvar, a ukoliko je kvar složeniji, u pomoć treba da pozovu radnike iz Službe održavanja.

u organizaciji se osećaju kao kod kuće, smatraju da su okruženi prijateljima, veruju da će i njihova deca i unuci raditi u ovoj organizaciji, ne brinu o svojoj budućnosti i uspeh organizacije doživljavaju kao lični uspeh. Tipičan odgovor mladog radnika, zaposlenog kraće od deset godina u organizaciji, glasi: „Ne, ne daj Bože, čim prođem kapiju, ja zaboravim na Elektranu”. Ove oprečne izjave mogu imati nekoliko mogućih uzroka: diferencijaciju *proizvodne subkulture* na još dve subkulture (mlađih i starijih radnika), proces promene dominantne organizacione kulture i/ili njenih subkultura ili izuzetno spor proces usvajanja subkulturnih vrednosti, verovanja i normi od strane novih zaposlenih.

*Proizvodnu subkultururu* Termoelektrane „T” smo okarakterisali kao otvorenu, jer su svi zaposleni složni u oceni da se novi radnici u njihovim radnim jedinicama brzo i lako uklapaju, i da se samo posle nekoliko dana osećaju u potpunosti prihvaćenim.

Procenjivanjem *percepcije zaposlenih o praksi organizacije u kojoj rade*, na dimenziji ovog indikatora koji razlikuje „labavu” i „čvrstu” kontrolu, *proizvodnu subkultururu* smo smestili negde između ova dva pola, jer ne postoji saglasnost u odgovorima koji su davali učesnici fokus-grupnih intervjuja. Mlađi radnici (posebno zaposleni u Sektoru proizvodnje) smatraju da je kontrola zaposlenih izuzetno stroga i da se pažljivo prati svaka njihova aktivnost i manipulacija u proizvodnom pogonu. Ovo zapravo i odgovara karakteristikama njihovog radnog mesta, stepenu rizika koji njihov posao nosi, kao i njihovom položaju u organizaciji. Međutim, kako priznaju, šale među zaposlenima postoje, ali šale na račun nadređenih smatraju se neprikladnim. Sastanaka kojima oni prisustvuju ima malo, pri čemu se vreme za sastanke ne poštuje striktno. Stariji radnici smatraju da sistem kontrole obavljanja njihovog posla postoji, ali da kontrola nije u tolikoj meri „čvrsta”. Stariji radnici se šale među sobom, šale se i sa nadređenima, a sastanci nikada ne počinju i ne završavaju se na vreme.

Poslednja dimenzija indikatora *percepcije zaposlenih o praksi organizacije u kojoj rade* razlikuje pragmatičan i normativan tip organizacionih subkultura. U *normativnim subkulturama* strogo se poštuju procedure i pravila u organizaciji, a insistira se na visokim standardima u pogledu poštenja i poštovanja poslovne etike, što u potpunosti odgovara *proizvodnoj subkultururi* Termoelektrane „T”. Ispitanici izjavljuju da oni u potpunosti poštuju procedure pri obavljanju posla i da nema nikakvog prostora za improvizacije, jer na njima leži velika odgovornost i posao ne trpi greške. Kolege procenjuju kao izuzetno poštene radnike kojima se uvek može verovati, na čiju se pomoć u radu uvek mogu osloniti a u čiji kvalitet obavljenog posla nikada ne sumnjaju.



Drugi indikator na osnovu koga je izvršeno identifikovanje karakteristika subkultura je indikator *organizacionih vrednosti*, koji predstavlja razlike u vrednostima vezanim za rad i radno mesto.

Prema *dimenziji distance moći, proizvodnu subkulturu* možemo okarakterisati kao *subkulturu visoke distance moći*, u kojoj se velike razlike u platama, velika potreba za nadzorom i centralizacija prihvataju kao opravdane. Ovde ponovo možemo napraviti distinkciju između odgovora mlađih i starijih radnika. Obe grupe su složne da u njihovim organizacionim jedinicama samo šefovi donose važne odluke, ali razlika je u načinu na koji mlađi i stariji radnici prihvataju takvu situaciju. Mlađi radnici smatraju da bi iskazivanje neslaganja sa šefom izazvalo njegovu negativnu reakciju i proizvelo negativne posledice. Stariji radnici su slobodniji u iskazivanju nezadovoljstva, a smatraju i da svojim sugestijama mogu doprineti boljem obavljanju posla. Čini nam se da stariji zaposleni opaženu situaciju u potpunosti doživljavaju kao normalnu i prirodnu i da im takva situacija pruža dodatan osećaj sigurnosti, a ne nelagode i pritiska. Mlađi radnici, iako takvu situaciju ne doživljavaju kao prijatnu, svojim ponašanjem, odnosno odsustvom negativnog ponašanja, pokazuju da ipak poštuju autoritet i prihvataju nejednakost.

Na dimenziji *izbegavanja neizvesnosti, proizvodna subkultura* se pokazala kao *subkultura visokog nivoa izbegavanja neizvesnosti*, u kojoj zaposleni preferiraju sigurnost i strogo poštovanje pravila, rad na duži vremenski period, kao i odsustvo sukoba i nadmetanja. Na osnovu odgovora mogli smo da zaključimo da je fluktuacija zaposlenih u ovim organizacionim jedinicama mala, da među zaposlenima nema nikakvih sukoba ili nadmetanja i da kod zaposlenih ne postoji potreba za isticanjem. Sva pravila i propisi strogo se poštuju u svim situacijama a sigurnost je na prvom mestu.

Na trećoj dimenziji vrednosti, *proizvodnu subkulturu* okarakterisaćemo kao *kolektivističku*, u kojoj je naglasak na pripadnosti i odanosti organizaciji, zapošljavanje i unapređenje ne zavise samo od individualnih veština i pravila, a donošenje odluka zasniva se na grupnom konsenzusu. Želimo da ukažemo i na povezanosti ove dimenzije organizacionih vrednosti i treće dimenzije percepcije zaposlenih o praksi organizacije, na kojoj smo *proizvodnu subkulturu* označili kao više *parohijalnu* nego *profesionalnu*, kao i na postojanje razlika u odgovorima mlađih i starijih zaposlenih. Odgovori ispitanika nesumnjivo su nam ukazivali na dominantan kolektivistički karakter *proizvodne subkulture*. Ispitanici su istakli da je za njih veoma značajno to što imaju sigurno zaposlenje i da im je to mnogo važnije nego mogućnost napredovanja i dokazivanja. Mlađi zaposleni želeli bi i da napreduju, i smatraju da im je to i omogućeno u službama u kojima rade, ali ističu i da, ukoliko bi im napredovanje bilo otežano ili onemogućeno, nikada

ne bi napustili stalan posao koji imaju u organizaciji. Kada su u pitanju načini zapošljavanja u njihovim organizacionim jedinicama, izdvojicemo nekoliko odgovora: „Zapošljavaju se preko političke pripadnosti”; „Devedeset devet posto”; „Otkad ja pamtim toga ima”; „I dok je bio Sloba i sad”; „A zapošljavaju i decu”; „Sposobnosti (*smeh*) [...] nikakve sposobnosti nisu potrebne, samo ga dovedite”. Kada je u pitanju napredovanje u organizaciji, odgovori su bili nešto drugačiji, ali smatramo da mogućnost i načini napredovanja, iako su regulisani pravilima i procedurama, zavise i od neke vrste dogovora i kolektivističke pravde.

Na četvrtoj dimenziji, *proizvodnu subkulturu* možemo okarakterisati kao *žensku subkulturu*. U „ženskim” kulturama preferira se slobodno vreme nasuprot većoj zaradi, posao se humanizuje učestalim kontaktima i dobrom kooperacijom, a konflikti u organizacijama rešavaju se obećanjima i pregovorima. Zanimljiv je i podsticajan odgovor jednog ispitanika: „Jednostavno sam osuđen da sa njim budem dobar i da se šalimo (*smeh ostalih radnika*) [...] jer, ako nisam dobar sa njim, ja ne mogu da obavim dobro posao, a ne zato što ja želim da budem dobar sa njim”.

Treći indikator pomoću koga smo pokušali da identifikujemo subkulture u Termoelektrani „T” je *lokus kontrole sopstvenog položaja u organizaciji*. Verovanje zaposlenog da njegov položaj u organizaciji zavisi od njegovih sposobnosti i zalaganja je unutrašnji lokus kontrole, dok verovanje da položaj u organizaciji zavisi od podrške uticajnih ljudi, sticaja okolnosti i drugih uzroka koji su van njegove kontrole je spoljašnji lokus kontrole sopstvenog položaja u organizaciji. Pripadnici *proizvodne subkulture* smatraju da karijera zaposlenog u njihovoj organizaciji zavisi kako od njih samih tako i od brojnih drugih okolnosti, prvenstveno od političke pripadnosti. Oni smatraju da je razvoj njihove karijere delimično u njihovim rukama, ali i da postoji mnogo drugih faktora koji su van njihove kontrole, a koji određuju pravac karijere u organizaciji. Kada je u pitanju zarada, plate radnika su fiksne i zavise od radnog mesta, godina staža, broja radnih dana, noći i praznika provedenih na radnom mestu, i svakom zaposlenom je jasno zbog čega njegova plata iznosi toliko koliko iznosi, a podela se smatra pravičnom. Ali zaposleni periodično dobijaju nagrade i stimulacije koje dodeljuje isključivo šef prema sopstvenoj proceni, a za koju smatraju da često nije u vezi sa stvarnim zaslugama pojedinca. Kada je u pitanju profesionalni ugled, zaposleni smatraju da u najvećoj meri zavisi od samog zaposlenog i njegovih sposobnosti i zalaganja, a podrška organizacije uslovljena je brojnim faktorima, među kojima ponovo kao najdominantnije ističu političku pripadnost i veze (prijateljske i rodbinske). Ispitanici ukazuju i na veliku povezanost između podrške koju neki zaposleni uživa u organizaciji i karijere tog zaposlenog.

### *Birokratska subkultura u Termoelektrani „T”*

Uvid u karakteristike ove subkulture u organizaciji izvršeno je ispitivanjem ukupno 15 zaposlenih, podjeljenih u tri fokus-grupe, koji svoje poslove obavljaju u Službi analitike i planiranja, Pravnoj i Finansijskoj službi. Svaku od tri grupe ispitanika činili su administrativni radnici iz iste službe, ali različitog pola, stepena obrazovanja (nešto više onih sa stečenim visokim obrazovanjem), godina starosti, godina radnog staža i godina provedenih u organizaciji.

Prema prvoj dimenziji indikatora *percepcija zaposlenih o praksi organizacije* u kojoj rade, *birokratsku subkulturu* Termoelektrane „T” smo smestili negde između ova dva pola, ali bliže ka orijentaciji na proces, jer su ispitanici davali različite odgovore kako u okviru ispitivanih grupa tako i između grupa. Dok zaposleni u Finansijskoj službi izjavljuju da posao doživljavaju kao izrazito monoton, jer im je svaki dan na poslu u potpunosti isti, a zaposleni u Službi analitike i planiranja svoj posao karakterišu kao izuzetno dinamičan, mišljenja zaposlenih u Pravnoj službi su podjeljena. Svi zaposleni u ovim organizacionim jedinicama su bili uglavnom saglasni da posao koji obavljaju nije naporan, odnosno da ne ulažu maksimum truda u obavljanje svakodnevnog posla. Podjeljena su mišljenja u vezi sa lakoćom prilagođavanja na promene, pri čemu mlađi radnici iz ovih službi priželjkjuju promene i raduju im se, a stariji radnici su skeptični i nesigurni po ovom pitanju.

*Birokratsku subkulturu* možemo okarakterisati kao *subkulturu orijentisanu na zaposlene*. Ispitanici iz sve tri službe navodili su brojne pogodnosti koje zaposleni u Termoelektrani „T” uživaju, što im pruža osećaj da organizacija brine o zaposlenima i o njihovim ličnim problemima. Organizacija ima obzira prema zaposlenima i ne vrši veliki pritisak na njih kako bi obavili posao. Važne odluke u ovim organizacionim jedinicama donose isključivo direktori i rukovodioci službi, a ponekada se konsultuju i sa zaposlenima. *Birokratska subkultura* u Termoelektrani „T” se nesumnjivo pokazala kao *parohijalna*. Ispitanici su bili složni u oceni da se u njihovim organizacionim jedinicama radnici češće zapošljavaju na osnovu nekih drugih kriterijuma (političke i rodbinske pripadnosti) nego na osnovu sposobnosti i kvalifikacija. Iako pojedini zaposleni ponekad razmišljaju o promeni posla, većina se nada da će do kraja radnog veka ostati na sadašnjem poslu. Čak i mlađi radnici iz ovih službi ne razmišljaju mnogo o prelasku u druge organizacije, uprkos činjenici da je napredovanje u njihovim službama skoro u potpunosti onemogućeno i da ono zavisi isključivo od spoljnih faktora. Takođe, većina birokratskih radnika doživljava organizaciju kao drugu kuću, a oni radnici koji Termoelektranu „T” na taj način ne doživljavaju priznaju da zaposlene u okviru njihovih službi povezuju ne samo kolegijalne nego i prijateljske veze.

*Birokratsku subkulturu* u Termoelektrani „T” možemo označiti kao otvorenu. Svi zaposleni smatraju da se novi radnici brzo i lako uklapaju i da ne postoje neke posebne karakteristike koje bi novi zaposleni morao da poseduje kako bi se uklopio. Ali, izrazićemo i sumnju u otvoreni karakter *birokratske subkulture* u celini, jer, kako zaposleni navode, ljudi se zapošljavaju u isključivo zahvaljujući poznanstvima, rodbinskim vezama i članstvu u političkim strankama. To može da znači da su ovi ispitanici verovatno i van organizacije na taj način povezani i da su svoje prijateljske odnose dolaskom u organizaciju samo dodatno učvrstili i pretvorili u odnose poslovne saradnje, što bi svedočilo u prilog zatvorenosti *birokratske subkulture*.

*Birokratsku subkulturu* Termoelektrane „T” možemo okarakterisati kao *subkulturu sa 'labavom' kontrolom*, jer, prema svedočenju zaposlenih, kontrole rada zaposlenih u ovim službama, u pravom smislu te reči, nema. Sastanci se u ovim službama retko održavaju, pri čemu se vreme za sastanke ne poštuje striktno, a prisutne su i svakodnevne šale među zaposlenima, povremeno i šale među zaposlenima i nadređenima.

*Birokratska subkultura* se u našem istraživanju pokazala kao *normativna*. Svaka od ovih službi obiluje brojnim pisanim procedurama i pravilima i one se uglavnom poštuju, ali je upravo zbog njihove brojnosti gotovo nemoguće uvek ispoštovati sve njih.

Što se tiče organizacionih vrednosti kao indikatora subkulture, na osnovu odgovora ispitanika, *birokratsku subkulturu* nismo mogli sa sigurnošću okarakterisati ni kao *subkulturu visoke distance moći*, ni kao *subkulturu niske distance moći*, stoga smo je smestili na sredinu ove dimenzije. Odgovori ispitanika iz tri službe su se razlikovali, ali i sami odgovori unutar službi nisu bili saglasni. Naime, ispitanici smatraju da šef treba da se konsultuje sa zaposlenima pri donošenju važnih odluka, a da u praksi on to veoma retko čini. Sa druge strane, iako zaposleni izjavljuju da se ne boje da iskažu neslaganje sa svojim šefom, kada ih u retkim situacijama nadređeni za mišljenje i pita, oni su uglavnom suzdržani i mišljenje ne iznose.

*Birokratska subkultura* se pokazala kao *subkultura visokog nivoa izbegavanja neizvesnosti*. Zaposleni smatraju da se procedure pri obavljanju posla u većini slučajeva moraju poštovati, iako možda ne u najstrožem smislu, ali da se samostalno kršenje procedura bez prethodne saglasnosti sa nadređenim smatra neprihvatljivim. Takođe, zaposleni su složni u oceni da nema ni rivaliteta niti takmičenja među zaposlenima u ovim organizacionim jedinicama, što je, po oceni samih zaposlenih, posledica izuzetno male mogućnosti napredovanja u ovim službama.

*Birokratsku subkulturu* u Termoelektrani „T” možemo okarakterisati kao *kolektivističku*. Zaposlenima u navedenim službama važnije je to što imaju si-

gurno zaposlenje nego mogućnost napredovanja i usavršavanja, sa čime se slažu i mlađi radnici. Zapošljavanje i napredovanje u ovim organizacionim jedinicama ne zavisi od sposobnosti i veština zaposlenih, od čega bi, prema mišljenju radnika, trebalo da zavisi, već od prijateljskih, rodbinskih i političkih veza.

Ovu subkulturu možemo okarakterisati kao *žensku subkulturu*. Zaposleni ističu važnost dobrih međuljudskih odnosa i izbegavanja sukoba, ali, kada je u pitanju poverenje u ljude sa kojima rade, tu su zaposleni ovih službi nešto oprezniji.

Što se tiče *lokusa kontrole sopstvenog položaja u organizaciji*, kao trećeg indikatora karakteristika *organizacione subkulture*, pripadnici *birokratske subkulture* se slažu da imaju vrlo malo ili nimalo uticaja na razvoj sopstvenih karijera u organizaciji i da napredak u karijeri ne zavisi od stručnosti, znanja i sposobnosti samog zaposlenog, već od političke pripadnosti, rodbinskih i prijateljskih veza. Kada je u pitanju zarada zaposlenih, i ovi radnici navode da postoji fiksni i varijabilni deo zarade, ali, pored očekivanog iskazivanja nezadovoljstva u pogledu pravične raspodele varijabilnog dela, ovi zaposleni iskazuju nezadovoljstvo i u vezi visine i raspodele fiksnog dela zarade. Naime, koeficijent zaposlenog, na osnovu koga se određuje visina zarade, nije vezan za stručnu spremu, poziciju i ostale parametre kao u slučaju pripadnika *proizvodne subkulture*, već je stvar dogovora između direktora službi i radnika. Ovakvo stanje sigurno ne utiče pozitivno na želju ispitanika za podizanjem stručnih kvalifikacija. Nezadovoljstvo povećava položaj i ugled koji, prema mišljenju zaposlenih, ove organizacione jedinice imaju u organizaciji, a što takođe negativno utiče na visinu zarade zaposlenih. Kada je u pitanju podrška organizacije, pored već pomenutih faktora, veliki uticaj ima loš ugled koji cela administracija ima u Termoelektrani „T”, za razliku od radnika Službe proizvodnje i Službe održavanja i svih inženjera, koji, prema viđenju pripadnika *birokratske subkulture*, uživaju veliki ugled, organizacija ih uvek štiti i po različitim osnovama im stalno izlazi u susret.

### *Inženjerska subkultura u Termoelektrani „T”*

Uvid u karakteristike ove subkulture pružili su nam razgovori sa ukupno 13 inženjera građevinske, mašinske i elektro struke u okviru tri fokus grupe. Ovi ispitanici, zaposleni u Inženjeringu, Službi održavanja i Službi za obuku kadrova Termoelektrane „T” bili su pretežno muškog pola, različitih godina života i godina provedenih u organizaciji. Ispitanici su davali prilično neodređene i kratke odgovore na pitanja moderatora i izricali često zvanične stavove organizacije, želeći verovatno na taj način da prikriju lične stavove, što je znatno uticalo na kvalitet opisa ove subkulture i iznošenje valjanih zaključaka. Smatramo da člano-

ve *inženjerske subkulture*, u odnosu na druge grupe, karakteriše najmanji stepen međusobne sloge i jedinstva.

*Inženjersku subkulturu* Termoelektrane „T” smo označili kao subkulturu orijentisanu na rezultate. Ispitanici su složni u konstataciji da im svaki dan na poslu nije isti, da se u nepoznatim situacijama često nalaze i u njima dobro funkcionišu, a da generalno posao ne bi mogli okarakterisati kao naporan, jer u većini slučajeva ne zahteva od njih ulaganje maksimalnog truda.

Ova subkultura je orijentisana na zaposlene. Ispitanici ističu da se na njih ne vrši veliki pritisak kako bi posao bio obavljen i da uživaju veliko poštovanje i razumevanje od strane šefova, koji ih često konsultuju prilikom donošenja odluka. Većina inženjera smatra da organizacija brine o rešavanju ličnih problema zaposlenih i da je zainteresovana da pruži pomoć zaposlenima u različitim situacijama.

*Inženjersku subkulturu* u Termoelektrani „T” okarakterisaćemo kao *profesionalnu subkulturu*. Ispitanici su isticali da su odgovarajuće kvalifikacije i sposobnosti ključan faktor prilikom zapošljavanja novih radnika u ovoj organizaciji i da, iako su svesni mogućeg uticaja drugih faktora na proces zapošljavanja, ti faktori ipak ne mogu biti presudni. Takođe, ovi zaposleni veoma su zainteresovani za razvoj svoje profesionalne karijere, izuzev onih koje samo nekoliko godina deli od penzionisanja. Iako se osećaju prijatno obavljajući posao u Termoelektrani „T”, nju ipak ne doživljavaju kao drugu kuću. Očekivali smo da će se *inženjerska subkultura* na ovoj dimenziji pokazati više kao *parohijalna*, „stapajući” se na taj način sa ostalim zaposlenima u dominantno parohijalnoj organizaciji. Svojim odgovorima zaposleni su nas demantovali, jasno pokazujući da se neke njihove vrednosti razlikuju od vrednosti koje su usvojili članovi drugih subkultura u organizaciji i da ova subkultura predstavlja bolji kontekst za obrazovanje svojih članova od druge dve.

*Inženjerska subkultura* Termoelektrane „T” je *otvorena subkultura*, jer niko u ovim organizacionim jedinicama nije imao problema prilikom prilagođavanja na radno okruženje. Uzrok brzog prilagođavanja ispitanika leži u nepostojanju posebnih karakteristika koje bi novi zaposleni morao da poseduje da bi se uklopio, ali i u visokom stepenu prihvatanja različitosti od strane ispitanika u odnosu na zaposlene koji pripadaju drugim subkulturama u organizaciji. Uzrok možda leži i u činjenici da prilikom donošenja suda o novom zaposlenom inženjeru u većoj meri cene stručnost i mogućnost doprinosa novog zaposlenog organizacionoj jedinici nego posedovanje specifičnih ličnih karakteristika.

*Inženjerska subkultura* Termoelektrane „T” je subkultura sa izuzetno slabom kontrolom. Zaposleni su uglavnom navodili da je najvažnije da zadatak bude obavljen, da klasične kontrole zaposlenih nema, ali da šefovi ipak na neki

način imaju stalan uvid u rad svojih zaposlenih. Pored toga, vreme za sastanke se u ovim službama ne poštuje strogo, a kada su u pitanju šale među zaposlenima, one su svakako prisutne, ali u različitom obimu u različitim službama.

*Inženjerska subkultura* se u našem istraživanju pokazala kao *normativna*. Procedure za obavljanje posla se u velikoj meri poštuju, a insistira se na poštenju i poštovanju poslovne etike.

Istražujući *organizacione vrednosti* koje dele pripadnici *inženjerske subkulture*, ustanovili smo da je ovu subkulturu moguće označiti kao *subkulturu niske distance moći*. Većina ispitanika smatra da šef treba da se konsultuje sa zaposlenima prilikom donošenja važnih odluka i da je u njihovim organizacionim jedinicama takav slučaj, a da straha od negativnih posledica zbog iskazivanja neslaganja sa šefom nema. Ovu subkulturu u poređenju sa proizvodnom i birokratskom odlikuje najniža distanca moći, koja može biti posledica i posebnog ugleda koji ovi inženjeri uživaju u organizaciji, ali i manje razlike u kvalifikacijama i sposobnostima između nadređenih i podređenih u odnosu na ostale subkulture.

*Inženjerska subkultura* u Termoelektrani „T” ima visok nivo izbegavanja neizvesnosti. Među ispitanicima nema rivaliteta i nadmetanja, jer za takvim ponašanjem nema razloga, a uvek bi se prethodno konsultovali sa šefom ili kolegom u situacijama kada bi morali da prekrše neko pravilo ili proceduru.

Ovo je *dominantno individualistička subkultura sa izvesnim kolektivističkim karakteristikama*. Većina ispitanih inženjera smatra da zapošljavanje i napredovanje u organizaciji treba da zavise isključivo od individualnih sposobnosti i veština, odnosno da su „stručnost, kvalitet i znanje na prvom mestu”. Međutim, dok starijim radnicima jeste najvažnije da u ovoj organizaciji imaju stalan posao i to što ga obavljaju u mirnom okruženju, mlađi inženjeri su navodili različite motive zbog kojih su se u Termoelektrani „T” zaposlili i zbog kojih u njoj još rade. Među njima su najizraženiji: mogućnost sticanja novih znanja, mogućnost profesionalnog razvoja i sticanje ugleda zbog rada u jednoj velikoj i uspešnoj organizaciji, što će im, kako se nadaju, omogućiti napredovanje u ovoj organizaciji ili lakše zapošljavanje i napredovanje u nekim drugim organizacijama.

Kao i prethodne dve, i ova subkultura je *ženska*, jer ispitanici ističu važnost dobrih međuljudskih odnosa na radnom mestu. Kada je u pitanju stepen poverenja koji ovi inženjeri imaju u kolege sa kojima saraduju, on je različit među zaposlenima različitih službi, ali je svakako znatno manji nego stepen poverenja koji veže pripadnike *proizvodne subkulture*. Na kraju bismo zaključili da, iako pripadnike *inženjerske subkulture* karakterišu u određenoj meri drugačije vrednosti vezane za rad i radno mesto nego pripadnike *proizvodne* i *birokratske subkulture* (koje su u pogledu vrednosti među sobom nešto sličnije), kao i vrednosti dru-

gačije od vrednosti dominantne kulture, ovu subkulturu svakako ne možemo smatrati kontrakulturom.

Kada razmatramo *lokus kontrole sopstvenog položaja u organizaciji*, ispitanici govore da karijera osoba u Termoelektrani „T” zavisi od više različitih faktora, ali pre svega od faktora koje bi mogli označiti unutrašnjim, odnosno zavisi od samih zaposlenih i njihovih kvalifikacija, sposobnosti i angažovanosti na poslu. Od ostalih faktora pomenuti su rodbinski i stranački odnosi. Zarada, kojom su ovi zaposleni uglavnom zadovoljni, zavisi od objektivnih činilaca, odnosno od radnog mesta, obrazovanja i godina provedenih u organizaciji, dok se dodatne nagrade i stimulacije, prema mišljenju ovih zaposlenih, raspodeljuju prema zaslugi. Kada su u pitanju ugled i podrška organizacije, i oni, prema mišljenju ispitanika, uglavnom zavise od samog pojedinca – od njegove stručnosti, kvalifikacija i zalaganja.

Analizirajući izlistane karakteristike sve tri opisane organizacione subkulture, možemo zaključiti da nijedna od ove tri subkulture nije kontrakultura, da je *proizvodna* verovatno podržavajuća, *birokratska* u najvećoj meri podržavajuća, ali i ortogonalna, a *inženjerska subkultura* sasvim sigurno ortogonalna subkultura. Čini nam se da je obrazovanje kao generička tačka stvaranja subkulture naglašeno samo u *inženjerskoj subkultur*i, dok je za članstvo u druge dve subkulture samo jedan od preduslova, zajedno sa drugim faktorima.

## Obrazovne karakteristike zaposlenih u Termoelektrani „T” i njihova povezanost sa organizacionom subkultur

### *Kvantitet obrazovanja pripadnika organizacionih subkultura*

Istražujući kvantitet (obim) obrazovanja pripadnika *proizvodne*, *birokratske* i *inženjerske subkulture* u Termoelektrani „T”, želeli smo da utvrdimo da li su zaposleni koji pripadaju različitim subkulturama u različitoj meri participirali u obrazovnim aktivnostima u poslednjih pet godina.



**Tabela 2:** Obim (kvantitet) obrazovanja zaposlenih u Termoelektrani „T”

	Proizvodna subk. (19 ispitanika)	Birokratska subk. (15 ispitanika)	Inženjerska subk. (13 ispitanika)
Nijednom	4	1	0
Jednom	1	2	1
jednom godišnje	5	0	1
dva puta	2	4	2
tri do pet puta	6	5	3
više od pet puta	1	3	6

Analizom podataka izraženih u Tabeli br. 2 možemo zaključiti da su se pripadnici *inženjerske subkulture* najčešće obrazovali u posljednjih pet godina, a značajan nam je i podatak da su se svi intervjuisani inženjeri obrazovali bar jednom u posmatranom periodu. Pripadnici *birokratske subkulture* slede pripadnike *inženjerske subkulture* u obrazovnim aktivnostima, od kojih se jedan ispitanik nijednom nije obrazovao u posljednjih pet godina, a preko tri četvrtine, odnosno 12 ispitanika obrazovalo se češće od jednom godišnje. Među pripadnicima *proizvodne subkulture* imamo čak četiri ispitanika koja su navela da se nisu obrazovali nijednom u posljednjih pet godina, pet ispitanika izjavilo je da se obrazovalo jednom godišnje, dok je šest njih participiralo u obrazovnim aktivnostima od tri do pet puta u posljednjih pet godina. Stoga možemo da zaključimo da pripadnici *inženjerske subkulture* češće participiraju u obrazovnim aktivnostima nego pripadnici *birokratske* i *proizvodne subkulture*, a ovi nalazi odgovaraju opštoj pretpostavci, kao i nalazima brojnih istraživanja, da se obrazovaniji više i obrazuju.

### *Mesto obrazovanja pripadnika organizacionih subkultura*

Drugi indikator se odnosi na podatke o različitim *mestima na kojima se ispitanici obrazuju*. Pripadnici *proizvodne subkulture* najčešće participiraju u obrazovnim aktivnostima koje su organizovane u samoj Termoelektrani „T”. Na drugom mestu po učestalosti su formalne obrazovne institucije na kojima se obrazovalo šest ispitanika, verovatno kako bi ispunili zahteve radnog mesta na kome se nalaze ili na koje prelaze, dva ispitanika su navela da su se obrazovala u drugim organizacijama, dok je samo jedan ispitanik samostalno organizovao svoje obrazovne aktivnosti kod kuće, a drugi ispitanik je samoinicijativno učestvovao u obrazovnim aktivnostima, ali na mestu koje nije precizirano. Svi pripadnici *birokratske subkulture* su se obrazovali u okviru organizacije, jedan broj njih učestvovao je i na stručnim seminarima i savetovanju održanim van organizacije u kojoj su zaposleni, dok je troje, odnosno četvoro njih učestvovalo u obrazovnim aktivno-

stima na radničkim i narodnim univerzitetima i privatnim školama, odnosno u srednjim školama i na fakultetima. Samo jedan od ispitanih birokratskih radnika obrazovao se samostalno kod kuće, dok se od trinaest ispitanih inženjera čak deset obrazovalo kod kuće. Pripadnici *inženjerske subkulture* su se obrazovali na različitim mestima za razliku od pripadnika preostale dve subkulture, dok se najviše pripadnika *proizvodne subkulture* obrazovalo u Termoelektrani „T”.

Posebnu pažnju nam privlači podatak da je čak deset od trinaest ispitanih inženjera učilo kod svoje kuće, što nam može ukazivati na to da Termoelektrana „T” obrazovnim aktivnostima koje organizuje ne zadovoljava u potpunosti obrazovne potrebe svojih inženjera. Za razliku od njih, proizvodni radnici se u najvećem broju obrazuju samo u organizaciji u kojoj su i zaposleni. S druge strane, ovo korespondira i sa profesionalnim i individualističkim karakterom *inženjerske subkulture*, čiji pripadnici ističu da je za njih veoma važno stalno usavršavanje i sticanje novih znanja i veština, kao i profesionalni razvoj i napredovanje, a ne samo opstanak u organizaciji u kojoj su sada zaposleni i u kojoj su im obezbeđeni stalan posao i sigurna primanja. Međutim, ovo može ukazivati i na činjenicu da se inženjeri obrazovanjem kod kuće pripremaju i za napuštanje sadašnjeg posla i zapošljavanje u novoj organizaciji. Isto tako, i podatak koji smo dobili od zaposlenih koji pripadaju *birokratskoj subkulturi*, da ih njihovi nadređeni periodično šalju na različite seminare i kurseve van organizacije, može da ukazuje na to da oni rade u organizacionim jedinicama koje ih ipak na određeni način stimulišu na preduzimanje obrazovnih aktivnosti, ali i na to da su seminari i kursevi nagrada (na šta su nam i sami zaposleni skrenuli pažnju), odnosno prilika da se odsustvuje sa posla i putuje, čime parohijalna organizacija, odnosno parohijalna i nestimulišuća organizaciona jedinica želi da učvrsti privrženost zaposlenih i dokaže svoje usmerenje na zaposlene.

### *Sadržaji obrazovanja pripadnika različitih subkultura*

Treći obrazovni indikator se odnosi na *sadržaje* koje u *procesu obrazovanja* usvajaju ispitanici, pripadnici različitih subkultura. Kao što se moglo očekivati, ispitanici iz sve tri analizirane subkulture najviše usvajaju sadržaje iz oblasti vezanih za njihovu struku, odnosno radno mesto, kao i iz oblasti bezbednosti i zdravlja na radu i zaštite od požara. Svi ispitanici proizvodni radnici su izjavili da su usvajali znanja iz ovih oblasti, dok su samo dva ispitanika navela da su usvajali znanja i iz drugih oblasti, odnosno iz oblasti vezanih za timski rad, rešavanje konflikata i veštine komunikacije. Kada su u pitanju ispitanici iz *birokratske subkulture*, pored usvajanja znanja iz već pomenutih oblasti, usvajali su i znanja iz računarstva i informatike (tri zaposlena) i stranih jezika (jedan zaposleni). Pripadnici *inženjerske*

*subkulture* su usvajali znanja iz svih oblasti koje smo im u okviru pitanja višestrukog izbora ponudili (oblasti vezane za struku/radno mesto, računarstvo i informatika, strani jezici, zaštita na radu i od požara, timski rad, rešavanje konflikata, veštine komunikacije), pri čemu je jedan ispitanik naveo i da je usvajao sadržaje iz neke druge oblasti. Stoga možemo zaključiti da pripadnici *inženjerske subkulture* usvajaju sadržaje iz više različitih oblasti, što ih i razlikuje od pripadnika *birokratske* i *proizvodne subkulture*. Ovi nalazi su u skladu sa utvrđenim parohijalnim karakterom *proizvodne* i *birokratske subkulture*, odnosno izjavama zaposlenih da ne razmišljaju mnogo o budućnosti u profesionalnom smislu i o promeni posla, kao i da se većina njih nada da će do kraja svog radnog veka ostati u ovoj organizaciji, iz čega proizilazi da ovi radnici participiraju isključivo u onim obrazovnim aktivnostima koje im omogućavaju zadržavanje sadašnjeg posla ili, ukoliko je to moguće, napredak u okviru same organizacije. Nasuprot njima, inženjeri su, pre svega, zainteresovani za profesionalni razvoj i sticanje novih znanja i veština, što pokazuju i preduzimanjem različitih aktivnosti sa ciljem usvajanja znanja iz različitih oblasti. To opet možda može značiti da je njihova namera i napuštanje ove radne organizacije, što ne isključuje želju za podizanjem vlastitih kompetencija.

Analizom izveštaja o aktivnostima i poslovima koji su realizovani radom Službe za obuku kadrova, ustanovili smo da su u okviru ove službe realizovane obrazovne aktivnosti sa sadržajima iz oblasti koje su isključivo vezane za struku, odnosno radna mesta zaposlenih, uglavnom pripadnika *proizvodne subkulture*, odnosno da su zaposleni upućivani na doškolovanje i kurseve isključivo iz oblasti povezanih sa strukom i radnim mestom.

### *Oblici obrazovanja pripadnika različitih subkultura*

Što se tiče *organizacionih oblika obrazovanja* kroz koje su se ispitanici obrazovali, ispostavilo se da su se zaposleni iz sve tri ispitivane subkulture najčešće obrazovali kroz predavanja, dok su se pripadnici *proizvodne subkulture* obrazovali koristeći i kurs (dva ispitanika) i seminar (četiri ispitanika), jedan pripadnik *birokratske subkulture* naveo je i da se obrazovao na konferenciji, dok su se zaposleni koji pripadaju *inženjerskoj subkultur*i obrazovali kroz sve ponuđene organizacione oblike, osim tim bildinga, ali i koristeći samostalno učenje, odnosno koristeći internet, stručnu literaturu i druge izvore. Očigledno je da se pripadnici *inženjerske subkulture* obrazuju kroz više različitih organizacionih oblika nego pripadnici druge dve subkulture Termoelektrane „T”, što se može objasniti većom inicijativom, otvorenošću i profesionalnom usmerenošću *inženjerske subkulture* i ne oslanjanjem isključivo na organizacijsku obrazovnu ponudu koja se javlja najčešće u obliku predavanja.

### *Motivi za obrazovanjem pripadnika različitih subkultura*

U istraživanju nas je zanimalo koji su najizraženiji *motivi* ispitanika za daljim obrazovanjem, kao i da li se njihovi motivi razlikuju u zavisnosti od pripadnosti određenoj subkulturi. Ispitanicima smo ponudili sledeće motive: povećanje plate, dobijanje boljeg radnog mesta, želja za usavršavanjem u struci, upućivanje na obuku od strane organizacije, želja za proširivanjem opšteg znanja i osećaj ličnog zadovoljstva prilikom učenja. Rezultati istraživanja ukazuju da pripadnike *proizvodne subkulture* dva motiva podjednako podstiču na obrazovanje: dobijanje boljeg radnog mesta i upućivanje na obuku od strane organizacije radi zadržavanja postojećeg posla. Na drugom mestu po učestalosti navođena je želja za usavršavanjem u struci, dva ispitanika su kao razlog navela povećanje plate, a samo jedan ispitanik bio je motivisan željom za proširenjem opšteg znanja.

Pripadnike *birokratske subkulture* na obrazovanje najviše motiviše želja za usavršavanjem u struci, dok su malo manje motivišući bili upućivanje na obuku od strane organizacije i želja za proširenjem opšteg znanja, dok su još dva ispitanika navela osećanje ličnog zadovoljstva prilikom učenja kao najizraženiji motiv za dalje obrazovanje. Kao što smo ranije istakli, pripadnici *birokratske subkulture* gotovo da ne mogu da napreduju, a plata im ne zavisi od stručne spremne, tako da je jasno da se i napredovanje i veća plata nisu mogli javiti kao motivi. Rezultati otvaraju pitanje da li monotona i nestimulišuća radna sredina u kojoj se zaposleni prijatno osećaju i koju ne žele da napuste, ali u kojoj ne mogu da napreduju, može stimulišuće da deluje na participaciju zaposlenih u obrazovnim aktivnostima, jer im obezbeđuje vreme u kome mogu da se obrazuju „za svoju dušu“.

Kada su u pitanju pripadnici *inženjerske subkulture*, želja za usavršavanjem u struci bila je najizraženiji motiv (kod više od polovine ispitanika), dok se na drugom mestu po učestalosti nalaze dobijanje boljeg radnog mesta, želja za proširenjem opšteg znanja i osećanje ličnog zadovoljstva prilikom učenja. Možemo konstatovati da je jedna od karakteristika inženjerske kulture naglašena intristična motivacija za daljim obrazovanjem.

### *Barijere za obrazovanjem pripadnika različitih subkultura*

Što se tiče *barijera* koje su ispitanike najviše sprečavale da participiraju u obrazovnim aktivnostima, najveći broj ispitanika pripadnika sve tri identifikovane subkulture u organizaciji ništa nije sprečavalo da participiraju u obrazovnim aktivnostima. Od identifikovanih barijera, među pripadnicima *proizvodne subkulture* najčešća je percepcija nepostojanja interesantnih ili za njih korisnih kurseva, dok je kod ostale dve subkulture najčešće navođena barijera nedostatak novca, što i jeste jedan od najčešćih odgovora koje odrasli daju po pitanju barijera par-

ticipacije u obrazovanju. Kada govorimo o proceni sopstvenih sposobnosti za učenje i obrazovanje kao potencijalnoj barijeri, možemo zaključiti da je najveći broj ispitanika iz sve tri identifikovane subkulture smatrao da su u potpunosti sposobni za preduzimanje aktivnosti obrazovanja i učenja, dok ostali procenjuju da su njihove intelektualne sposobnosti na zadovoljavajućem nivou i da im ne predstavljaju prepreku za participiranje u obrazovnim aktivnostima. Najbolje su svoje sposobnosti za učenje procenili pripadnici *inženjerske subkulture*, za kojima slede pripadnici *birokratske*, pa *proizvodne subkulture*, ali moramo reći da su razlike zanemarljive, a, zbog malog uzorka, ne možemo dati kategoričnu tvrdnju po ovom pitanju. Ono što možemo da konstatujemo je da su svi ispitanici saglasni u proceni da njihove obrazovne sposobnosti nisu u značajnoj meri opale da bi mogle predstavljati barijeru za obrazovanje.

### Zaključna razmatranja

Na osnovu sprovedenog istraživanja možemo konstatovati da su fenomeni obrazovanja i učenja odraslih i fenomen organizacione subkulture višestruko isprepleteni. Obrazovanje može biti jedna od osnovnih generičkih tačaka oko kojih se stvara organizaciona subkultura (kao u slučaju *inženjerske subkulture*), a i u slučajevima kada su drugi činioци primarni u stvaranju subkulture (*proizvodna* i *birokratska subkultura*) ona svojim svojstvima ima bitan uticaj na dalje učenje i obrazovanje svojih članova.

Možemo zaključiti da pripadnici *inženjerske subkulture* češće participiraju u obrazovnim aktivnostima nego pripadnici *birokratske* i *proizvodne subkulture*, a da razlog tome leži u karakteristikama *inženjerske subkulture*, koja svojim vrednostima, verovanjima i normama stimuliše zaposlene na preduzimanje obrazovnih aktivnosti. Smatramo da na veću participaciju pripadnika ove subkulture utiče i njihova percepcija da oni sami, u najvećoj meri, kontrolišu razvoj sopstvene karijere, utiču na stvaranje profesionalnog ugleda i na stepen podrške koji imaju u organizaciji. Pripadnici ove subkulture se obrazuju na više različitih mesta nego pripadnici *proizvodne* i *birokratske subkulture*, od čega se veliki broj njih obrazuje samostalno kod kuće. To može značiti da ne postoji obrazovna ponuda koja bi zadovoljila obrazovne potrebe pripadnika *inženjerske subkulture*, pa je oni samostalno zadovoljavaju, ali može ukazivati i na njihovu razvijenu kompetenciju za samoobrazovanje. Istraživački nalazi ukazuju i na to da pripadnici *inženjerske subkulture* usvajaju sadržaje iz više različitih oblasti nego pripadnici *birokratske* i *proizvodne subkulture*, i to kroz više različitih organizacionih oblika obrazovanja. Utvrdili smo da u sve tri istraživane subkulture motivi koji su u vezi sa profesijom

jom, odnosno poslom, najviše usmeravaju zaposlene na preduzimanje obrazovnih aktivnosti, dok su motivi koji su u vezi sa ličnim razvojem individue zastupljeni u manjem broju. Kada su u pitanju obrazovne barijere, većina ispitanika iz sve tri subkulture navela je da ih ništa nije sprečavalo da se obrazuju o onoj meri u kojoj su želeli. Kada su u pitanju zaposleni koji su identifikovali određene barijere, među zaposlenima *inženjerske* i *birokratske subkulture* kao najizraženija barijera javio se nedostatak novca, dok je kod *proizvodne subkulture* to bilo nepostojanje interesantnih ili korisnih kurseva za njih.

Možemo zaključiti da su u analiziranoj organizaciji *obrazovne karakteristike zaposlenih povezane sa pripadnošću određenoj subkulturi*, odnosno da zaposleni koji pripadaju određenoj subkulturi, usvajajući njene vrednosti, verovanja i norme ponašanja, mogu biti stimulisani ili destimulisani na preduzimanje obrazovnih aktivnosti. To se ne odnosi samo na frekvenciju obrazovnih aktivnosti zaposlenih već i na sadržaj, organizacione oblike, mesto i motive za obrazovanje i učenje.

Potencijalno negativan uticaj koji neke organizacione subkulture imaju na obrazovanje i učenje njenih članova ne znači da bi trebalo težiti njihovom nasilnom ukidanju, već njihovoj modifikaciji i upravljanju. Neophodno je stimulisati i prihvatiti različitosti, jer možda baš neka od tih subkultura poseduje vrednosti koje mogu organizaciju odvesti u pravom smeru, odnosno neophodno je konstantno oslušivati postojeće subkulture i koristiti njihove potencijale. Smatramo da bi prilikom organizovanja obrazovnih aktivnosti trebalo uzeti u obzir različite vrednosti i verovanja koje su zaposleni usvojili, a koje svakako imaju uticaj na njihovu participaciju u obrazovnim aktivnostima. Takođe, neophodno je svim zaposlenima koji ne poseduju pozitivne vrednosti vezane za obrazovanja i učenje te vrednosti konstantno usađivati. Učenje i obrazovanje predstavljaju adekvatne alate kojima se može upravljati organizacionim subkulturama u cilju dostizanja željene performanse organizacije.

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## Organisational Subculture and Employee Education<sup>9</sup>

**Abstract:** The purpose of the research, the results of which we present in this paper, was to determine the connection between the educational characteristics of employees and their affiliation with a particular organisational subculture. As part of the qualitative research paradigm, the model of a singular case study was used. The data for analysis were collected using focus-group interviews, surveys, scaling and analysis of documentation. The analysis and interpretation of the findings of the research lent empirical support to our hypothesis – that there is a connection between the educational characteristics of employees and the organisational subculture.

**Key words:** organisational culture, organisational subculture, employee education.

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# Metacognitive Strategies that Enhance Reading Comprehension in the Foreign Language University Classroom

**Abstract:** Developing reading skills through the use of different metacognitive strategies leads to the development of reading comprehension, which brings us to the ultimate aim of this paper, which is to reveal the importance of a metacognitive strategic approach in developing reading skills which may, in turn, positively influence reading comprehension. The research question was aimed at finding out whether the metacognitive strategy input realised within the *Textual Analysis* course yielded better results in the reading proficiency of those groups which had metacognitive strategy-based input. The analysis of the research questions was based on the corpus collected by way of a students' reading comprehension test, the students' writing of journals, their assessment by rubrics and a metacognitive strategy questionnaire. 40 university students of English as a foreign language belonging to the C2 reference level, were classified into experimental and control groups, according to the reading comprehension pre-test results. The results show that reading comprehension was significantly improved in the experimental groups as a direct result of the use of a metacognitive strategic approach in teaching reading skills.

**Keywords:** metacognitive strategies, reading comprehension, learning autonomy, assessment.

## Introduction

In recent years there has been a growing interest in the teaching of reading skills – in possible approaches to the task and in developing the level of effective read-

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ing comprehension at the university level of teaching and learning English as a foreign language (EFL) in Montenegro. This area of teaching belongs to the field of Foreign Language Teaching and may be related to a number of factors such as procedures in the teaching of the Methodology of English Language Teaching within the University of Montenegro teaching setting, procedures in the teaching of Textual Analysis within the Department of English Language and Literature at the University of Montenegro and the high level of exposure to English students have, both inside and outside the classroom. This last factor is due to the fact that both language and literature lectures are held in the English language – which means that students have a significant level of exposure to reading different genres of text, due to the study exchange projects and stays in other countries, and due to the availability of radio and TV in the English language where they are able to read and comprehend different reading contexts, etc.

In recent years the term ‘interactive’ has been used to describe the second language reading process... it describes a dynamic relationship with a text as the reader ‘struggles’ to make sense of it... In trying to create meaning from the text, you were undoubtedly involved in an active process, a process which Goodman (1967) called a ‘psycholinguistic guessing game’. (Hedge, 2005, p. 188)

The ways in which students become able to ‘make sense of a text’ is a process that should be developed and assessed within the foreign language classroom. In this sense, the recent growing interest in teaching reading skills also corresponds with the increasing academic demands made on students in the assessment of reading skills in the English language as part of the university’s assessment policy conducted in English Language Teaching methodology lectures and practical lessons at the Department of English Language and Literature in Nikšić relating to the C1 and C2 levels of English, according to the Common European Framework of Reference for Languages (CEFRL) (Bogojević, 2003, pp. 33-37).

Studies on reading skills and special ways to develop and assess them within the foreign language classroom have been carried out worldwide both in native settings (where English is learnt as a mother tongue) (Naiman & Rubin, 1983; O’Malley & Chamot, 1990; Oxford, 1990) and in foreign language settings (Arabsolghar & Elkins, 2001; Sheorey & Mokhtan, 2001; Mehrpour et al. 2012; Masum & Marof, 2012; Zhang, 2013; Seepho, 2013). In particular, attention is being paid to a strategic approach to teaching reading skills, in particular by using metacognitive strategies as a way of actively approaching reading and thus comprehending the text in a more efficient way.

This growing interest in the teaching of reading skills needs to be accompanied by a deeper knowledge of the use of metacognitive reading strategies in the teaching and academic context, such as in Textual Analysis lessons. Also, it needs to be included in the syllabus teaching programme as part of Methodology lectures and lessons at the university, as necessary preparation of future teachers for the strategic teaching of all language skills. Hence we thought it necessary to carry out research into the current reading comprehension of students of English as a foreign language at the university level as well as analyse the impact of metacognitive strategy use on the students' level of reading comprehension through the use of instruments such as a reading comprehension test, rubrics and a metacognitive strategy questionnaire, and derive pedagogical implications based on the results of the answers to the research questions.

### *Review of the literature*

The 21<sup>st</sup> century foreign language classroom is characterised by a tendency towards autonomy in learning – that students should be guided towards planning their learning, self-monitoring what they do during the performance of tasks and evaluating either the way they approach their own learning process or the their level of their progression in it. This tendency is in line with the most recent directions (Jeftić, 2008; Brajković, 2011; Vučeljić, 2011; Jimenez et al., 2009; Zhang & Seepho, 2013;) in the field of teaching and learning English as a foreign language both worldwide and in Montenegro. This approach is strategy-oriented, where the main aim is to use language learning strategies in order to prepare learners to become autonomous and use the language actively in all its aspects both in the development of language skills (such as listening, speaking, reading and writing) and of the language system, including grammar and vocabulary.

Thus the focus of this paper is on emphasising the importance of a unique strategy-based approach that helps foreign language learners to become proficient readers. To be more precise, metacognitive strategies, embodied in the strategic approach, emerge as those which might help a foreign language reader gain reading competence to the level of autonomy. In general, language learning strategies help in improving communicative competence. When it comes to foreign language competence, the use of language learning strategies could be applied to development of competence in all language skills. The communicative approach implicitly encourages learners to take greater responsibility for their own learning and to use a wide range of language learning strategies (Oxford, 1989, p. 29).

Therefore, metacognitive reading strategies help learners to take *greater responsibility* for their own reading. The learner has the opportunity to use a wide

range of metacognitive strategies in order to read in a more comprehensive way. This is the reason for considering metacognitive strategies, as unique methods which students use to accomplish language tasks efficiently. These strategies allow for active learning. According to the taxonomy of Rebecca Oxford (1990), metacognitive strategies belong to the indirect type of strategy. Rebecca Oxford claims that the aim of learning strategies is developing communicative competence. In her taxonomy, metacognitive strategies help learners to regulate their own learning, to focus, organise, plan and evaluate their learning (Ignjačević, 2009, p. 67).

Additionally, one of the most important features of metacognitive strategies is that they are highly applicable to all four language skills, especially to reading, where there are a number of studies which have a particular bearing on this research paper. Metacognitive strategies are thus regarded as special features or skills of the 21<sup>st</sup>-century learner:

Metacognitive strategies [...] will train learners to be able to plan their studies, decide on the purpose of an activity or task, learn to prioritize, organize an activity so as to link it with a previously mastered piece of knowledge or skill, and be able to monitor themselves in oral and written production and self-evaluation. (Jeftić, 2007, p. 203)

When it comes to the field of research on metacognitive strategies, practitioners who have carried out different research work on this type of strategy when used in relation to developing reading skills, and who have examined the concrete use of metacognitive strategies in increasing reading proficiency (Oxford, 1990; Sheorey & Mokhtan, 2001; Zhang & Seepho, 2013) as well as teachers' opinions and attitudes towards the effectiveness of metacognitive strategies for improving reading proficiency (Arabsolghar & Elkins, 2001), claim that these strategies allow learners to coordinate the learning process. These strategies are classified into three main categories: 1) centering your learning, 2) arranging and planning your learning and 3) evaluating your learning, where the first group could be classified into further sub-categories such as a) overviewing and linking with already known material, b) paying attention, c) delaying speech production to focus on listening. Within the second category there are six strategies: a) finding out about language learning, b) organising, c) setting goals and objectives, d) purposeful listening, reading, speaking, writing, e) planning for a language task and f) seeking practice opportunities.

The third category contains two strategies: a) self-monitoring and b) self-evaluating.

Strategic reading is a feature of proficient readers. In other words, strategic reading improves reading comprehension and actually helps readers to construct the meaning of the text. In this way metacognitive strategies help readers think about what they are reading, plan their reading, monitor their comprehension and evaluate the level of their reading comprehension. In order to become a proficient reader, it is necessary to use metacognitive strategies which allow the reader to be actively involved in reading.

Recent research into metacognitive reading strategies includes the studies carried out by Sheorey & Mokhtan (2001) and by Zhang & Seepho (2013), in which they place an emphasis on examining the effect of the use of these strategies in developing reading skills and improving reading proficiency within the setting of English as a foreign language. The general approach and final conclusion, judging by the research results, imply that the use of metacognitive strategies has a positive impact in terms of improving students' reading proficiency. Moreover, the researchers claim that this approach – the use of metacognitive strategies – could be applied to the acquisition of other language skills, such as listening, speaking and writing as well as the acquisition of vocabulary and grammar.

The study carried out by Arabsolghar and Elkins (2001) was also significant in terms of examining teachers' opinions on and attitudes towards the use of metacognitive reading strategies. The way teachers approach the teaching of reading skills while using these types of strategy as well as their background knowledge about them and their skills at transferring them to students, is also very important and deserves special attention in foreign language teaching and learning. Teachers need to work on their methodology of teaching, consulting literature and participating in different seminars or training events so that they are able to transfer their knowledge and skills to their students. The conclusions Arabsolghar and Elkins (2001) came to have produced positive results and opened up the possibility for further research into other language skills.

An overview of the studies mentioned here is highly relevant and closely related to the research on metacognitive reading strategies, and is presented briefly in order to give the reader an understanding of the current knowledge base of the research discussed here. To summarise, both studies constitute a solid and significant basis for the research in this paper, whereby the results of these studies have led the researchers to examine the applicability of these strategies to reading tasks and, more importantly, present the current situation in the EFL reading setting in Montenegro, to highlight the importance of the introduction of metacognitive reading strategies into the EFL university classroom in Montenegro and the methods of assessing reading comprehension.

The level of reading proficiency was examined through the use of instruments such as a reading comprehension test, rubrics and a metacognitive strategy questionnaire.

On the other hand, the context of the research into the use of metacognitive strategies (both in a general sense and, more specifically, in relation to reading tasks) within Montenegro's EFL setting, does not provide as abundant information and as significant research results as it does in the EFL setting in other countries. The reason for this lies in the fact that research into a strategic approach to teaching reading belongs to a broader area, such as the educational system in Montenegro in general, than just the EFL context.

The educational system in Montenegro, increasingly so at the beginning of the 21<sup>st</sup> century, is displaying a drive for change in terms of educational aims, principles, content, teaching approaches and methods in general. However, the reform changes are not oriented towards change in the foreign language classroom. Even though leading authors (Lalović 2009; Goranović, 2011; Perić, 2011; Pešić, 2011) in the area of education in Montenegro have mentioned the necessity of orientating teaching towards autonomous learning, there are very few who have emphasised the fact that metacognitive strategies are most useful in helping students gain autonomy in learning. These strategies are universal and can be applied in a setting wider than just foreign language learning. They can also be used in a general sense and need to be introduced into the educational system as a whole, since the emphasis of 21<sup>st</sup>-century reforms is on autonomous learning.

The principles of the new educational reforms in Montenegro are defined in the *Book of Changes* (2001), published by the Montenegro Ministry of Education and Science. The educational system as a whole, including the context of foreign language teaching and learning, is described in the *Book of Changes* (2001). However, the reforms are explained only in a general sense, with active learning recognised as being of vital importance, but without deeper analysis in relation to foreign language teaching and with no mention of metacognitive strategies as methods of active learning. On the other hand, one of the authors who has mentioned metacognitive strategies for the first time, Zoran Lalović (2008), suggests that "the question as to what pupils should learn" should be changed into "how pupils should learn" (p. 57) (own translation). Still, the author does not cover the significance of these strategies in the foreign language learning setting.

Also, within the context of educational reforms, the term autonomy is mentioned as being of importance where it is linked with the concept of lifelong learning especially with the competence of learning how to learn (Goranović, 2001). The author mentions that metacognitive strategies are ways that help learners to approach learning actively and find out how to learn. Autonomous

learners are those who understand the aim of learning certain subjects, accept their responsibility to learn, and take the initiative in planning, monitoring and evaluating their own learning process (Perić, 2011).

In terms of the overall situation in the educational system of Montenegro, it can be seen that autonomy refers to the foreign language teaching and learning context. However, there is a lack of data on the use of metacognitive strategies in teaching and their applicability to all or one of the language skills. It is evident that there is an interest in educational changes and practical use of rules and regulations in the classroom, in general. When it comes to actual interest in a strategic approach to teaching and learning a foreign language we came across two studies that best illustrate the situation in the foreign language classroom.

According to the available work of practioners in the field of foreign language teaching in Montenegro, it is evident that there is an interest in raising metacognitive awareness in relation to language skills.

As far as broader research work is concerned, the work of Natalija Brajković (2011) is interesting in that the author has recognised the importance of the metacognitive strategies included in Russian language textbooks. The author claims that pupils are becoming more and more aware of their own cognitive activities, where they use their own knowledge in order to monitor and evaluate, and metacognition is therefore an important aspect of their development (Brajković, 2011, p. 163). The author also identifies certain metacognitive reading strategies and signifies that they need to be included in FL primary school textbooks in Montenegro so that pupils can use them in order to link and integrate information with the background knowledge (p. 165) and to read actively.

Another study is based on research on metacognitive speaking strategies within the setting of French as a foreign language at university. The researchers (Nikčević & Bogojević, 2008) examined the positive effects on speaking proficiency of using this strategy.

When it comes to other language skills, there has been no significant research work done in the Montenegro EFL setting. It is evident that there is room for research work in the field of metacognitive strategies. They are recognized as important and oriented towards active learning and especially applicable to university-level students who are able to plan, monitor and evaluate their own learning process fully.

Since the necessity of a strategy-based approach use is being recognised in the Montenegrin foreign language classroom, the aim of this research was to enrich the field of the EFL setting in Montenegro with its results and humbly blaze a trail for further and similar research work in terms of other language skills, such as listening, speaking and writing. All these skills are equally important. They

are developed within the Montenegrin university setting as part of both the *Textual Analysis* course and the subject *Methodology of Teaching English as a Foreign Language* where the English language is taught and learnt at the Department of English Language and Literature in Nikšić as a foreign language.

This research will in particular contribute to English as a Foreign Language in Montenegro in light of the fact that educational reforms in Montenegro are oriented towards active and autonomous learning. Since there is a dearth of research work on these issues in the EFL Montenegrin context, this research could make a modest contribution and initiate further and possibly deeper studies.

Within the Department of English Language and Literature in Nikšić, reading skills are developed and improved as part of the *Textual Analysis* course. The methodology of this course will be explained in the *Methods* section of this paper. Before that it is important to explain the nature of the reading process and list some metacognitive strategies that could be used within the three phases of the reading process.

### *Strategic reading*

The mere act of reading contains three phases: pre-reading, during-reading and post-reading. Within all the phases, different metacognitive strategies can be used. For example, in the pre-reading phase *asking questions*, *activating background knowledge*, *setting goals* and *guessing* are metacognitive strategies that could be used for preparing students for the content of the text, activating their background knowledge while asking questions about the text or a topic of the text, etc., introducing students to the theme of the text where they can link their background knowledge with what they are going to read, and guess or expect from a text they are reading.

In the during-reading phase where most of the strategic reading occurs, the reader uses the strategies of scanning, skimming, etc., where they are required to pay attention to specific sections of the text in order to grasp either the main idea of the text or to look for a specific idea that they are asked for by the teacher.

In the final phase of reading, learners can use the strategies of summarising and paraphrasing. In the case of summarising, the reader summarises a text using the words from a text, while in paraphrasing the learner is able to use his or her own words. Both strategies help the reader to be actively involved in the reading of a text and evaluate their level of reading comprehension and the ways they have used strategies to comprehend the text.

To sum it all up, the basic component of strategic reading is metacognition. Actually, it is an elementary feature of successful reading where the reading process



is regarded as successful only when it results in reading comprehension. "Reading strategies could not be used effectively without the inclusion of a metacognitive component – background knowledge about the reading process and reading strategies, active monitoring, comprehension..." (Presley & Gilles, in Vehovec & Muranović, 2004, p. 96)

Reading comprehension is an active process of interaction between the reader and a text where the reading process is meaningful and can be realised by the use of metacognitive strategies. More importantly, reading comprehension can be continuously assessed in the foreign language classroom by students writing reflections on how they have comprehended the text and what the methods (strategies) are that have helped them best to comprehend it. The methods of reading comprehension assessment will be analysed in the next section of this paper.

## Methods

### *Research design*

Before focusing on the results obtained from the reading comprehension post-test, the journals assessed by rubrics and a metacognitive strategy questionnaire, we will first briefly describe the research design and participants who took part in this study.

We carried out the research with the collaboration of two teachers of Textual Analysis and 40 students of English as a foreign language at the Department of English Language and Literature (University of Montenegro). Since the research was conducted over a period of two semesters (one academic year), this research can be considered as being of the longitudinal type.

The students who participated in the research were at the C2 reference level, according to the CEFR. They were students of the second and third year of English as a foreign language attending the *Textual Analysis* Course as a core part of the main subject Modern English V and VI. They attended the course for a duration of two semesters.

According to the results of the reading comprehension pre-test, students were divided into two experimental and two control groups. There was one experimental group (10 students) and one control group (10 students) in their second year of studies and also one experimental group (10 students) and one control group (10 students) in their third year of studies. In terms of the gender structure of the students involved in the study, all were female.

The students in their second year of studies used the *Ready for CAE*<sup>3</sup> textbook while the third-year students used the *Proficiency Masterclass*<sup>4</sup> textbook. After evaluation of the textbooks at the beginning of the study, the research improved and enriched the syllabus of the textbooks with metacognitive strategies.

In the research, the students went through a three-phase procedure.

### *The first phase of the study*

In the first phase of this research, the textbooks used on the Textual Analysis course were analysed with the aim of examining the structure of the reading skills tasks – whether metacognitive strategies were implemented in the reading instructions – as well as enriching the Textual Analysis syllabus with all the metacognitive strategies to be applied to the reading tasks.

Two teachers of Textual Analysis, on the second and third years of studies, implemented the syllabus with the help of the authors of the research, preparing the lesson plan and procedure for each lesson and consulting regarding the reading lessons. Additionally, before the study began, the authors gave basic and important information about metacognitive strategies – the definition, classification and significance of their use in the foreign language classroom. The teachers and the authors had a meeting before each Textual Analysis lesson, at which they consulted on and analysed the lesson plan and procedure. Also, during the course, the authors observed the lessons, made notes aimed at pointing out to the teachers what to add or change in order to implement the plan as effectively as possible.

The next step in the first phase of the study was reading comprehension pre-testing. It was carried out at the beginning of the study in order to examine the homogeneity in reading comprehension skills, to even up the groups in terms of their knowledge so that they could be divided into experimental and control groups equal in knowledge before implementation of metacognitive strategies with experimental groups only.

After evening out the groups on the basis of the results of the reading comprehension pre-test, both the experimental and control groups started with the Textual Analysis course. All groups attended the Textual Analysis course; however, they went through different procedures within the three phases of the study.

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<sup>3</sup> Roy Norris with Amanda French (2008). Oxford: Macmillan

<sup>4</sup> Gude, K. and M. Duckworth (2002). Oxford: Oxford University Press

### *Procedure within experimental groups*

During the first phase of the study, the experimental groups attended a course where the teachers incorporated metacognitive strategies into reading tasks in order to enable students to comprehend the text as well as possible. Only students in the experimental groups used metacognitive reading strategies. According to the researchers' plan, textbooks were enriched with a repertoire of metacognitive reading strategies, so that the experimental groups used more reading strategies than the textbooks actually contained.

### *Procedure within control groups*

Within the first phase of the study, control groups also attended the course. However, the procedure in these groups was different from the procedure in the experimental groups. The control groups did not have enriched reading tasks with metacognitive strategies as the experimental groups did. They only used the strategies they already had in the textbooks.

To conclude, both groups attended the Textual Analysis course but only the experimental groups used additional metacognitive reading strategies as a part of the research plan. The researchers thus aimed to investigate whether there was any difference in reading comprehension between these groups or, more precisely, whether this enriched lesson plan and procedure helped those students who used metacognitive reading strategies to comprehend the text better.

### *Second phase of the study*

In the second phase of the study, apart from the teachers' incorporation of metacognitive strategies into reading tasks only in the experimental groups and the usual course procedure without the instruction in the control groups, students also wrote journals about how well they comprehended the texts they had read in class. Additionally during this phase, the teachers assessed the journals using rubrics.

### *Procedure within experimental and control groups*

At this stage, the teachers assessed students' reading comprehension by asking the students to write reflective journals about the text they had read in class. The teachers marked the journals using rubrics based on five criteria: clarity, relevance, analysis, interconnection, and self-criticism. In addition, both the experimental and control groups wrote reflective journals in order to examine whether

the experimental groups were more successful due to their implementation of metacognitive reading strategies in the classroom. This means that during the second phase of reading the two groups had only one thing in common: the writing of reflective journals and their assessment by rubrics. The main difference between the procedures followed by the groups was that the experimental groups had enriched reading tasks with metacognitive strategies. The aim of having both groups write reflective journals was to examine whether there was any difference in the results in favour of the experimental groups who had had instruction in metacognitive reading strategies.

The following tables, Table 1 and Table 2, represent the ways in which the teacher applied metacognitive strategies within the *Textual Analysis* course.

Table 1 provides data on the text (the title, the genre of the text, the reading context, the type of reading analysis, the aim of the task, metacognitive strategies applied in the textual analysis and reading phases, such as pre-reading, during-reading and post-reading).

**Table 1:** data on the text

The title of the text	Motherhood's best-kept secret
The genre of the text	Newspaper article
Context	The nature of the mother-and-son relationship in the past and present.
The type of reading analysis	Gapped text
The aim of the task	To use metacognitive reading strategies in order to comprehend the text better and more efficiently
Metacognitive strategies applied in the textual analysis	Activate background knowledge; set goals-identify the purpose of the task; personalising; directed attention; asking questions; scanning; self-talk; answering questions; evaluate yourself; evaluate your strategies
Reading phases	Pre-reading; during-reading; post-reading

Table 2 provides the reader with detailed information about which metacognitive strategies are used in all three phases of reading.

**Table 2:** Strategic reading procedure

The phases of reading	Description of the reading procedure
Pre-reading phase	<p>The teacher asks the following questions: <i>When you are upset or have a problem, who do you turn to first for help and advice? Why? Has this always been the case?</i> applying the metacognitive strategy of <i>activating background knowledge</i> about the subject of the questions. After that, the students need to link their responses with the title of the text and predict the content of the text they read in class. In this case, the teacher uses the metacognitive strategy of <i>predicting</i> as well as the metacognitive strategy of <i>directed attention</i>. The teacher directs attention to the title of the text and to students' responses to the questions in order to help the students to focus on the reading task. The teacher also directs students' attention to the text explaining to them that they should complete the text by organising the paragraphs into the right order.</p>
During-reading phase	<p>Students scan the text in order to link the paragraphs of the two texts into one main text. Teacher suggests to the students that they underline all the words and phrases which show a connection between the paragraphs. In this way students monitor their reading comprehension. After the first reading, students read the text again, checking the logical connection between paragraphs using the metacognitive strategy of <i>monitoring</i> and <i>evaluating</i>.</p>
Post-reading phase	<p>In the final phase of reading, the metacognitive strategy of <i>evaluation</i> is used. The teacher asks questions in order to check reading comprehension. The questions are: <i>To what extent have parent-children relationships changed in recent decades in your own country? Is the relationship very different for sons and daughters?</i> Also, the metacognitive strategy of <i>personalising</i> is used since the main idea of the text is linked with the personal experience of the students. Also, the metacognitive strategy of <i>summarising</i> and <i>paraphrasing (evaluating your learning strategies)</i> are used within this phase to check reading comprehension.</p>

Thus in the second phase of the study, apart from conducting textual analysis, students wrote journals about the text they had read in class. In order to help them write their diary the students were given a set of questions. The authors of this study formulated the questions using the following website [www.workshop.on.co](http://www.workshop.on.co)<sup>5</sup> and modified them in terms of the aim of writing the journals, i.e. to assess the students' reading comprehension. Specifically there were six prompts or questions that helped students to analyse the method and level of their reading comprehension.

<sup>5</sup> Retrieved August 3 2010

For the first question, students needed to notice whether they were reading the title of the text first or the picture accompanying it. With this question we can identify metacognitive strategies such as: *activating background knowledge* and *guessing*. These strategies belong to the pre-reading phase.

For the second question, the reader needs to write how long it took him or her to comprehend the text. Here, the metacognitive strategies of self-evaluation can be identified. This is used in the third phase of reading – post-reading.

The metacognitive strategy of *self-evaluation* is also used for the third question, where students identify their reading difficulties and provide examples of difficult reading parts in the text.

In order to respond to the fourth and fifth questions, students used the metacognitive strategies of *monitoring* and *guessing*. The answers to the fourth question referred to students' identification of whether there were any unknown words in the text, where they were required to use the dictionary. The responses to the fifth question responses were intended to show that the readers had identified whether they were able to guess the meanings of those unknown words.

The answer to the sixth question required the readers to link the content of the text with their personal experience – whether they had read anything similar in their mother tongue. Here, the readers were using the metacognitive strategy of personalising. This was used in the pre-reading and post-reading phase too.

The teachers assessed the students' diaries using rubrics. The rubrics were based on five criteria – clarity, relevance, analysis, interconnections and self-criticism. The teachers used this method of assessment for purposes of objectivity.

The abovementioned criteria are closely connected to the questions in the journal. The students' responses themselves reflected the level of fulfilment of the criteria where the criteria were marked on a scale of 1–5. Table 3 shows the structure of the rubrics.

Table 3: Rubrics

Criteria	Mark
<p><b>Clarity:</b> The language is clear and expressive. The reader can create a mental picture of the situation being described. Abstract concepts are explained accurately. Explanation of concepts makes sense to an uninformed reader.</p> <p><b>Relevance:</b> The learning experience being reflected upon is relevant and meaningful to the student and the course learning goals.</p> <p><b>Analysis:</b> The reflection moves beyond simple description of the experience to an analysis of how the experience contributed to student understanding of self, others, and/or course concepts.</p> <p><b>Interconnections:</b> The reflection demonstrates connections between the experience and material from other courses, past experience and/or personal goals.</p> <p><b>Self-criticism:</b> The reflection demonstrates the ability of the student to question his/her own biases, stereotypes and preconceptions, and/or assumptions and define new modes of thinking as a result.</p>	5
<p><b>Clarity:</b> Minor, infrequent lapses in clarity and accuracy.</p> <p><b>Relevance:</b> The learning experience being reflected upon is relevant and meaningful to the student and the course learning goals.</p> <p><b>Analysis:</b> The reflection demonstrates the student's attempts to analyse the experience but the analysis lacks depth.</p> <p><b>Interconnections:</b> There has been reduced effort to demonstrate connections between the learning experience and previous other personal and/or learning experiences.</p> <p><b>Self-criticism:</b> The reflection demonstrates the ability of the student to question his/her own biases, stereotypes and preconceptions.</p>	4
<p><b>Clarity:</b> There are frequent lapses in clarity and accuracy.</p> <p><b>Relevance:</b> The student makes attempts to demonstrate relevance, but the relevance is unclear to the reader.</p> <p><b>Analysis:</b> The student makes attempts to apply the learning experience to understanding of self, others, and/or course concepts but fails to demonstrate depth of analysis.</p> <p><b>Interconnections:</b> There is a very superficial attempt to demonstrate connections between the learning experience and previous other personal and/or learning experiences.</p> <p><b>Self-criticism:</b> There is some attempt at self-criticism, but the self-reflection fails to demonstrate a new awareness of personal biases, etc.</p>	2–3
<p><b>Clarity:</b> Language is unclear and confusing throughout. Concepts are either not discussed or are presented inaccurately.</p> <p><b>Relevance:</b> Most of the reflection is irrelevant to the student and/or the course learning goals.</p> <p><b>Analysis:</b> Reflection does not move beyond description of the learning experience(s).</p> <p><b>Interconnection:</b> No attempt to demonstrate connections to previous learning or experience.</p> <p><b>Self-criticism:</b> No attempt at self-criticism.</p>	1

The authors of the study also checked the validity of the reflective journal using Cronbach's alpha coefficient. Table 4 represents the validity of the journals for both the second and third years of student participants in the study.

**Table 4:** The validity of journals

Cronbach's alpha coefficient		Number of criteria (clarity, relevance, analysis, interconnections, self-criticism)
Second year	0.959	5
Third year	0.930	5

According to the results shown in Table 4, the reflective journals can be considered valid. All alpha values of 0.80 and higher are considered standard and acceptable values of validity.

### *The third phase of the study*

In the third phase of this study, students (from both the experimental and control groups) completed a reading comprehension post-test where the results of their reading comprehension pre-test and post-test are compared in order to find out their progress from the beginning to the end of the study in reading comprehension.

Additionally, all students filled in a metacognitive strategy questionnaire in which they expressed their opinion about metacognitive reading strategies in all three reading phases – whether they used them and to what extent. These results were also analysed, whereby the researchers compared the results of the experimental and control groups to see whether there was any difference in the results in favour of the experimental groups that could be ascribed to the fact that the experimental groups had used metacognitive strategy instruction within the *Textual Analysis* course.

The students' responses to the questionnaire were also used for determining any correlation between the responses to the questionnaire and the reading comprehension post-test.

The questionnaire consisted of 26 items, with three parts each relating to the strategies used within the three phases of reading, where students could indicate their opinion on a scale of 1–5 .

The results of Cronbach's alpha coefficient here too pointed to the validity of the questionnaire used in this study. Table 5 shows the results of the questionnaire validity analysis.



**Table 5:** The validity of the questionnaire

Cronbach's alpha coefficient	Number of items in the questionnaire
0.976	26

The authors of this study adapted the questionnaire according to the aims of the study, in which they were only observing reading skills. The questionnaire was a version of Chamot and O'Malley's (1990) classification of language strategies – a classification which is relevant to all language skills – so the authors had to leave out the items from the questionnaire that covered other language skills, such as listening, speaking and writing. Since the focus of this study was reading skills, the authors took into consideration only the items concerning reading skills.

### *Hypotheses*

According to the division of groups into experimental and control ones, the researchers set out hypotheses comparing the results between experimental and control groups. The hypotheses of the study were as follows:

**General hypothesis:** All experimental groups (both the second and third years of studies), that apply metacognitive reading strategies during reading lessons (*Textual Analysis* course), will improve their reading comprehension more than the control groups;

**Hypothesis 1:** Both the second- and third-year experimental groups will have better results from the rubrics than the control groups;

**Hypothesis 2:** Both the second- and third-year experimental groups will have better results in the questionnaire than the control groups;

**Sub-hypothesis 2.1:** Both the second- and third-year experimental groups will have better results in the first part of the questionnaire than the control groups;

**Sub-hypothesis 2.2:** Both the second- and third-year experimental groups will have better results in the second part of the questionnaire than the control groups;

**Sub-hypothesis 2.3:** Both the second- and third-year experimental groups will have better results in the third part of the questionnaire than the control groups;

**Hypothesis 3:** Both the second- and third-year experimental groups will have better results in the reading comprehension post-test than control groups.

### *Analysis of results*

The results were analysed in three sections:

- analysis of the reading comprehension pre-test and post test
- analysis of the rubrics
- analysis of the metacognitive strategy questionnaire.

The data collected through the abovementioned instruments was analysed using the SPSS 17.0 (*Statistical Package for Social Sciences*) program. Both quantitative and qualitative analyses were carried out, where qualitative analysis was used for examination of the hypotheses.

### *Reading comprehension pre-/post-test*

The results of the reading comprehension pre-test were compared with the results of the reading comprehension post-test in order to examine whether there is any difference in the level of reading comprehension within the groups which had metacognitive instruction (experimental groups) and those that did not (control groups).

In this section, we compare the results of the reading comprehension pre-test and post-test between the experimental and control groups in their second year of studies, as well as those in their third year of studies.

The following figure shows the scoring average and percentage results of students' responses to the reading comprehension pre-test and post-test and the differences in the results of these tests between the experimental and the control groups when it comes to the second year results.

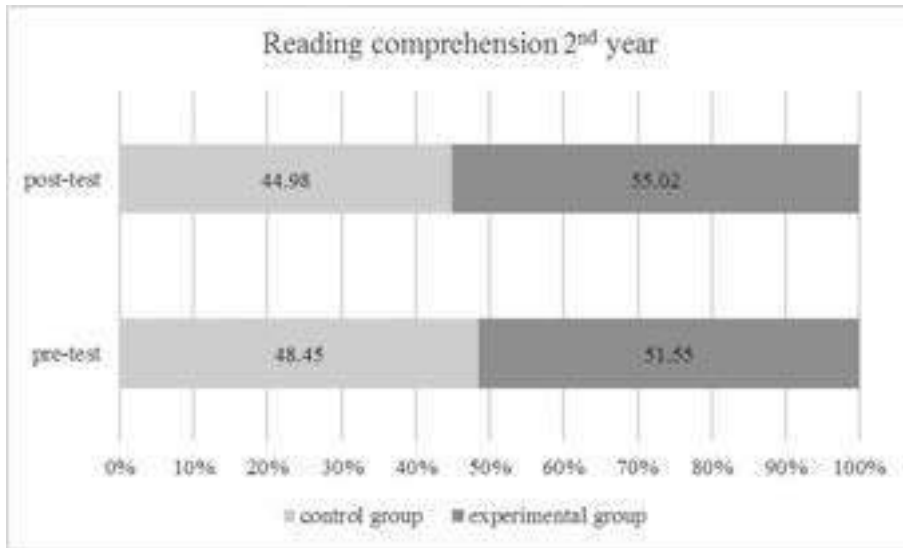


Figure 1: Pre-/post-test results, 2<sup>nd</sup> year

As illustrated in the graph, as regards the second-year results, the experimental group showed better performance when comparing their results between the pre-test and post-test. 51.55% of the students in the experimental group answered the pre-test properly (according to the test key) while 55.02% of the same group answered the post-test properly, which suggests that the experimental groups improved thanks to the instruction they got within the *Textual Analysis* course throughout one academic year.

Furthermore, the experimental group also had better results in the post-test in comparison with the control group. The experimental group had higher post-test scores than the control group, specifically, 55.02% of students in the experimental group answered the test properly in comparison to the control group, whose percentage was 44.98%.

Figure 2 shows the scoring average and percentage results of students' responses to the reading comprehension pre-test and post-test and the differences in the results of these tests between experimental and control groups within the third year of studies.

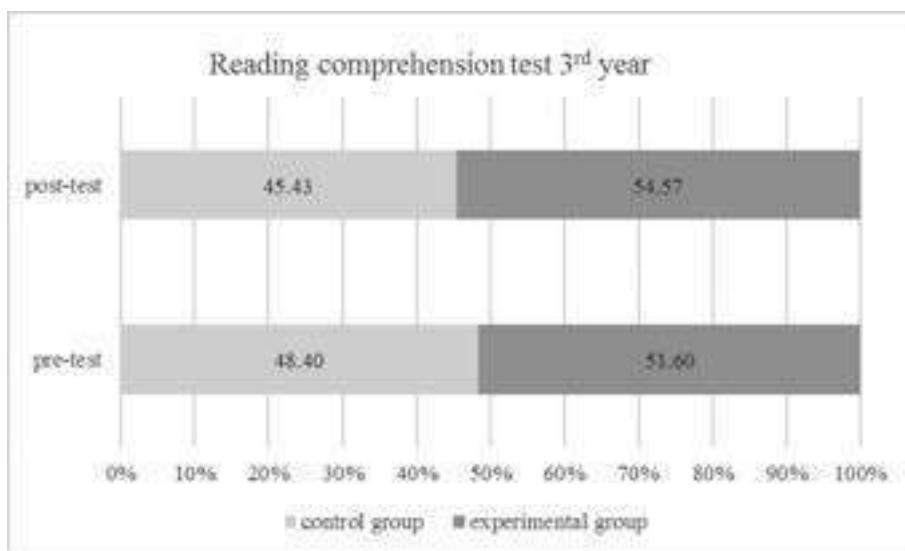


Figure 2: Pre-/post-test results, 3<sup>rd</sup> year

As illustrated in the graph, the experimental group had better results when comparing their own results between the pre-test and post-test. 51.60% of the students in the experimental group answered the pre-test properly (according to the test key) while 54.57% of the same group answered the test properly, which suggests that the experimental groups improved thanks to the instruction they got within the Textual Analysis course throughout one academic year.

Furthermore, the experimental group also had better results in the post-test in comparison to the control group. Thus the experimental group had higher post-test scores than the control group, specifically 54.57% of students in the experimental group answered the test properly in comparison to the control group whose percentage was 45.43%.

When we examine the overall results of the second and the third year of studies, we can conclude that hypothesis 3 – that both the second- and third-year experimental groups would have better results in the reading comprehension post-test than the control groups – was justified.

### *Rubrics*

During this study, reflective journals were used in order to assess the students' reading comprehension, to compare the results of rubrics, based on five criteria,

between experimental and control groups as well as to make a correlation between the journal and the post-test. Rubrics were used for assessment and marking of the journals. The results we present here are the overall results based on the scoring results of rubrics where all five criteria (clarity, relevance, analysis, inter-connection and self-criticism) were included in the statistical analysis and were taken into consideration. The analysis is based on the scoring average statistical analysis (M), t-test analysis (t-test) and hypothesis analysis (p). We present the results we obtained from this type of analysis in the following two figures and two tables (Figure 3 and 4 and Tables 6 and 7).

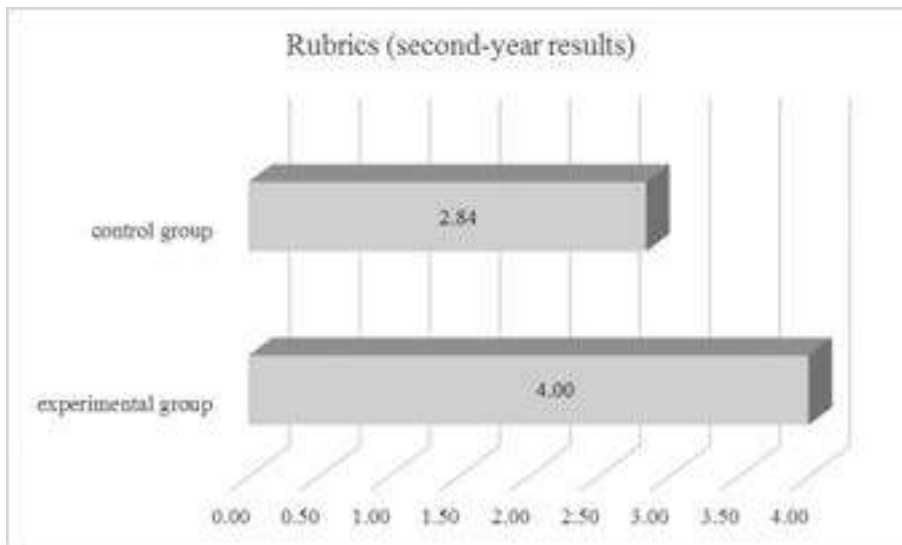


Figure 3: Results for rubrics, 2<sup>nd</sup> year

Table 6: Results for rubrics, 2<sup>nd</sup> year

	Experimental group	Control group
M	4.00	2.84
t	3.934	
p	0.001	

As illustrated in Figure 3 and Table 6, the average rubrics score for the second year in the experimental group was  $M=4.00$  while the control group had an average rubrics score  $M=2.84$ . The t-test result,  $t(18)=3.934$ ,  $p=0.001$ , means

that with 99% confidence we observe a statistically significant difference between the experimental and control group in favour of the experimental group.

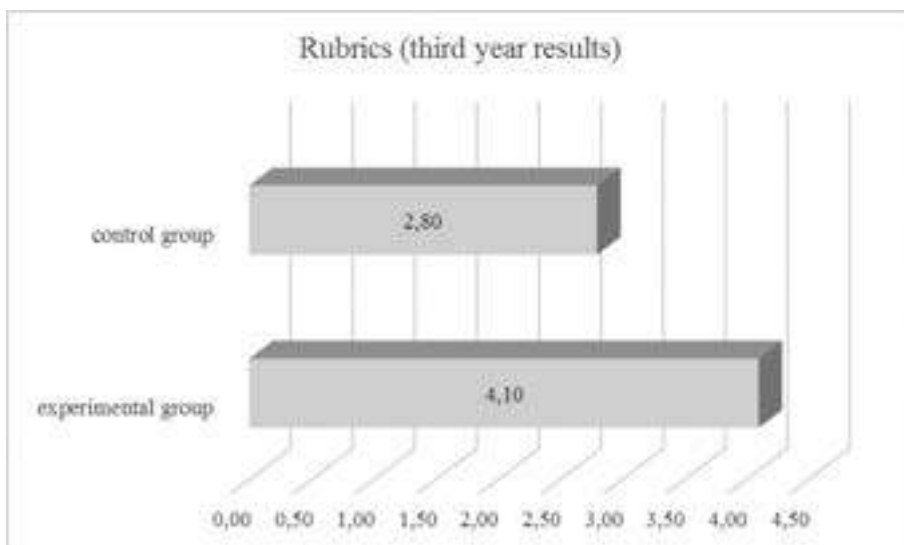


Figure 4: Results for rubrics, 3<sup>rd</sup> year

Table 7: Results for rubrics, 3<sup>rd</sup> year

	Experimental group	Control group
M	4.10	2.80
t	6.091	
p	0.000	

As illustrated in Figure 4 and Table 7, the average rubrics score for the third year in the experimental group was  $M=4.10$  while the control group had an average rubrics score of  $M=2.80$ . The t-test result,  $t(18)=6.091$ ,  $p=0.000$  means that with 99% confidence we observe a statistically significant difference between the experimental and control group in favour of the experimental group.

When we examine the overall rubric results of the second and the third year of studies, we can conclude that hypothesis 1, that both the second and third year experimental groups would have better results from the rubrics than the control groups, was justified.

*Metacognitive strategy questionnaire for students*

The metacognitive strategy questionnaire for students was included in the study in order to examine whether and to what extent students used metacognitive reading strategies in all their phases of reading. The results we present here are the overall results based on the scoring results of all three reading phases (pre-reading, during-reading and post-reading). The analysis is based on the scoring average statistical analysis (M), t-test analysis (t-test) and hypothesis analysis (p). We present the results we obtained from this type of analysis, for the second year of studies, in Figure 5 and Table 8.

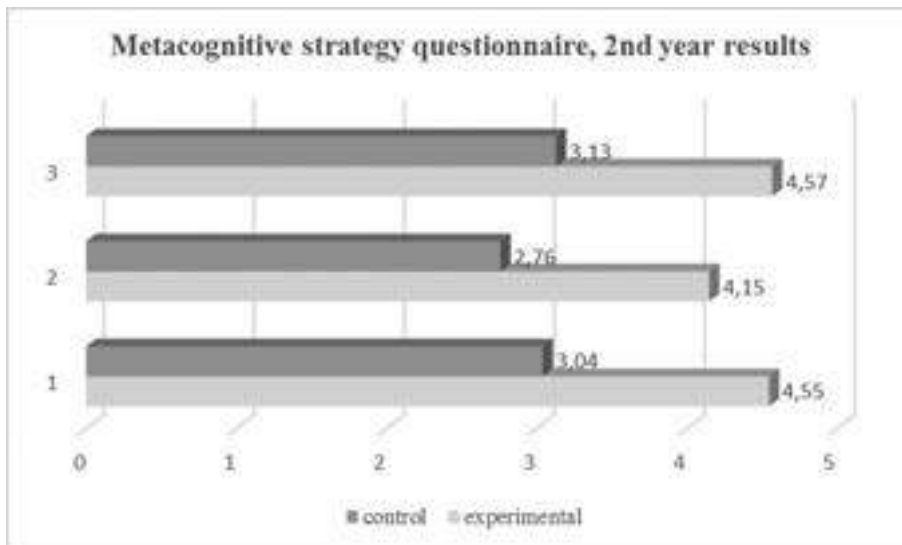


Figure 5: Metacognitive strategy questionnaire results

**Table 8:** Metacognitive strategy questionnaire results, 2<sup>nd</sup> year

		Experimental group	Control group
Pre-reading phase	M	4.55	3.04
	t	6.869	
	p	0.000	
During reading phase	M	4.15	2.76
	t	6.866	
	p	0.000	
Post reading phase	M	4.57	3.13
	t	7.024	
	p	0.000	

As illustrated in Figure 5 and Table 8, the average questionnaire score for the second year and the pre-reading phase in the experimental group was  $M=4.55$  while the control group had an average questionnaire score of  $M=3.04$ . The t-test result,  $t(11.938)=6.869$ ,  $p=0.000$  means that with 99% confidence we observe a statistically significant difference between the experimental and control group in favour of the experimental group.

In the experimental group, the average questionnaire score for the questions related to the during-reading phase was  $M=4.15$ , while the control group had an average score  $M=2.76$ . The t-test result,  $t(11.424)=6.866$ ,  $p=0.000$  means that with 99% we observe a statistically significant difference between the experimental and the control group in favour of the experimental group.

Also, the average questionnaire score in the experimental group for the questions related to the post-reading phase was  $M=4.57$ , while the control group had an average score of  $M=3.13$ . The t-test result,  $t(10.132)=7.024$ ,  $p=0.000$  means that with 99% confidence we observe a statistically significant difference between the experimental and control groups.

In Figure 6 and Table 9, we present the questionnaire results for the third year of studies.



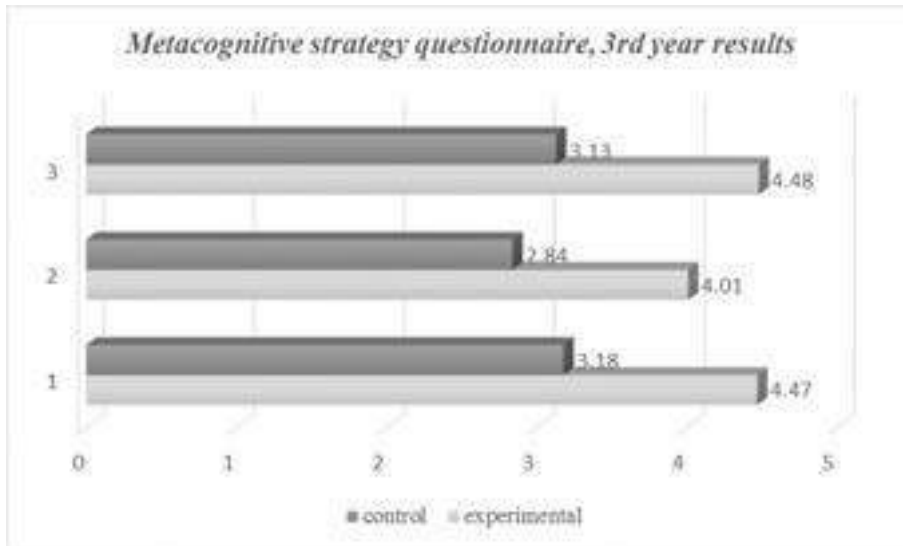


Figure 6: Metacognitive strategy questionnaire results

Table 9: Metacognitive strategy questionnaire results

		Experimental group	Control group
Pre-reading phase	M	4.47	3.18
	t	3.329	
	p	0.004	
During-reading phase	M	4.01	2.84
	t	3.318	
	p	0.004	
Post-reading phase	M	4.48	3.13
	t	7.024	
	p	0.002	

As illustrated in Figure 6 and Table 9, the average questionnaire score for the second year and pre-reading phase in the experimental group was  $M=4.47$ , while the control group had an average questionnaire score of  $M=3.18$ . The  $t$ -test result,  $t(18)=3.329$ ,  $p=0.004$ , means that with 99% confidence we observe a statistically significant difference between the experimental and control groups in favour of the experimental group.

In the experimental group, the average questionnaire score for the questions related to the during-reading phase was  $M=4.01$  while the control group had an average score of  $M=2.84$ . The t-test result,  $t(18)=3.318$ ,  $p=0.004$  means that with 99% confidence we observe a statistically significant difference between the experimental and control groups in favour of the experimental group.

Also, the average questionnaire score in the experimental group for the questions related to post-reading phase was  $M=4.48$  while the control group had an average score of  $M=3.13$ . The t-test result,  $t(18)=7.024$ ,  $p=0.002$  means that with 99% confidence we observe a statistically significant difference between the experimental and control groups.

When we examine the overall questionnaire results of the second and the third years of studies, we can conclude that hypothesis 2 – that both the second and third year experimental groups would have better results from the questionnaire than the control groups – was justified.

Also, sub-hypothesis 2.1 – that both the second and third year experimental groups would have better results in the first part of the questionnaire than the control groups – was justified.

Sub-hypothesis 2.2 – that both the second and third year experimental groups would have better results in the second part of the questionnaire than the control groups – was justified.

Sub-hypothesis 2.3 – that both the second and third year experimental groups would have better results in the third part of the questionnaire than the control groups – was justified.

When we examine all the results relating to the reading comprehension pre-test and post-test, rubrics and metacognitive strategies, we arrive at the conclusion that the null hypothesis, that all experimental groups (both in the second and third year of studies) that applied metacognitive reading strategies during reading lessons (*Textual Analysis* course) would improve their reading comprehension more than the control groups, was justified.

### *Pedagogical implications and discussion*

From the results of the analysis of the corpus from the reading comprehension pre-test and post-test, rubrics and metacognitive strategy questionnaire for students, we can draw some pedagogical implications and draw some final conclusions.

Since the hypotheses were shown to be justified, we can conclude that the strategic approach to reading skill is effective, where the application of metacognitive reading strategies improves reading comprehension. These results could

also help in improving the syllabus of the *Textual Analysis* course as part of the university's teaching of reading skills, where teaching tasks for reading should be implemented with metacognitive strategies.

The results also suggest that metacognitive strategies are very useful and help to achieve effective reading comprehension, and could also be applied to different genres of text. Moreover, they help the reader to gain autonomy and self-confidence in reading, as the strategies help them plan and monitor reading tasks, as well as evaluate their own level of comprehension, promoting active reading. To put it another way, active involvement in a task improves memorisation and the preservation of this information in the long-term memory (Ausubel et al., 1978).

Since the results of this research imply positive effects from the use of metacognitive strategies in the development and improvement of reading comprehension skills, we consider it very important to raise awareness about the use of this approach in the foreign language classroom. Teachers also need to have background knowledge about the use of these strategies as well as the skills to transfer them in the classroom. So, it is not enough to teach different reading strategies, it is also necessary to know how to use them (Ling, 2012, p. 38).

During this research, the teachers gave instructions to students according to the improved teaching syllabus they received from the authors of this research, i.e. the authors of this research enriched the *Textual Analysis* syllabus with metacognitive strategies. Very often consultations and meetings between teachers and the authors of the research led to improved quality in the teaching of the syllabus. Also, both the authors and teachers worked on the lesson plan and procedure of each lesson in order to prepare for its realisation in the best possible way. In this way, and according to the positive results of the research, teachers realised that the Textual Analysis course was an important subject and could be improved on in the future, whereby teachers could receive this instruction in the form of literature analysis, approach to literature reading, training events or monthly seminars.

A strategic approach, in the case of our study, embodied in the use of metacognitive reading strategies, is considered a very important and basic element in the modern foreign language classroom. It is more effective, when a different method of assessment accompanies metacognitive strategy instruction. It means that, in the case of our research, reflective journals and rubrics as a method of assessment are more than welcome in the foreign language reading classroom. These methods of assessment help teachers to assess students' work in a completely objective way. The rubrics were based on five criteria that helped teachers to assess students' journals in an objective way where they could assess

the journal from the perspective of its clarity, relevance, analysis, interconnections and self-criticism.

Since assessment is a very important teaching aspect in the FL classroom, journals and rubrics can be regarded as valid and reliable instruments for tracking students' knowledge and improvement in a continuous way. With this method of assessment, especially when it comes to university level teaching and learning, we wanted to emphasise that the reading comprehension test alone, carried out at the beginning or the end of a semester, is not enough to gain an insight into the students' real knowledge. Students' knowledge and its improvement must be assessed continuously and throughout the whole academic year, which is made possible by the students writing journals and the teachers assessing them with rubrics, specifically when it comes to reading comprehension assessment.

### Conclusion

According to the results we obtained, we recommend journals and rubrics as essential methods of assessment, and metacognitive strategies as integrated instructions for reading tasks in order to improve students' reading comprehension.

We believe that the results of this study could bring about a positive impact on the improvement of the Textual Analysis syllabus in terms of the use of metacognitive strategies as methods of active reading and journals and rubrics as methods of assessment, in order to lead students towards active reading in the wider sense and learning in the general sense. These results also point to the fact that these methods reflect current tendencies in the 21<sup>st</sup>-century foreign language classroom in Montenegro.

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## Uticaj metakognitivnih strategija na efikasno razumijevanje teksta u univerzitetskoj nastavi stranog jezika

**Apstrakt:** Razvijanje vještine čitanja putem korišćenja raznih metakognitivnih strategija vodi do razvoja čitanja sa razumevanjem, što nas dovodi do krajnjeg cilja ovog rada, a to je da otkrijemo značaj metakognitivnog strateškog pristupa u razvijanju vještina čitanja što bi, zauzvrat, moglo pozitivno da utiče na čitanje sa razumevanjem. Cilj istraživanja je bio ispitati da li je korišćenje metakognitivnih strategija u okviru kursa *Analiza teksta* donelo bolje rezultate u sposobnosti čitanja kod grupa koje su koristile te strategije. Analiza pitanja u istraživanju je zasnovana na korpusu koji su činili studentski test razumevanja pročitano, studentski dnevnici, procene studenata po rubrikama i upitnik za metakognitivne strategije. Četrdeset studenata univerziteta koji uče engleski kao strani jezik i poseduju znanje nivoa C2, bilo je raspoređeno po eksperimentalnim i kontrolnim grupama, na osnovu rezultata u čitanju sa razumevanjem koje su ostvarili pre testa. Rezultati pokazuju da je razumevanje pročitano značajno poboljšano kod eksperimentalnih grupa, što je direktna posledica upotrebe metakognitivnog strateškog pristupa u poučavanju vještinama čitanja.

**Ključne reči:** metakognitivne strategije, čitanje sa razumevanjem, autonomija učenja, procena.

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## Mogućnosti primene koncepta ličnog okruženja za E-učenje 2.0

**Apstrakt:** Cilj ovog rada jeste prikaz različitih mogućnosti primene savremenih veb 2.0 alata za e-učenje. U radu se pošlo od objašnjenja i definisanja neformalnog učenja i e-učenja 2.0 kao osnovnih pojmova, zatim je objašnjeno neformalno učenje posredovano tehnologijama i, na kraju, razjašnjen je koncept ličnih okruženja za učenje kao predlog savremenog rešenja za e-učenje 2.0. Takođe, dat je prikaz najčešće korišćenih alata 2.0 sa implikacijama njihove primene na savremeno obrazovanje.

**Ključne reči:** neformalno učenje, veb 2.0, e-učenje 2.0, lično okruženje za učenje.

### *Uvod*

Okruženje u kome živimo i radimo odlikuju turbulentnost i globalizacija. Danas, na takvom tržištu, jedina kompetitivna prednost na koju pojedinac može da računati je znanje. Današnji poslodavci očekuju da njihovi budući kadrovi raspolažu savremenim znanjima u određenoj oblasti, kao i praktičnim veštinama korišćenja savremenih informaciono-komunikacionih tehnologija.

Iako su relativno poznati oblici i metode e-učenja bazirani na informaciono-komunikacionim tehnologijama, oni još nisu u dovoljnoj meri primenjeni, posebno ne u našim uslovima. U ovom radu razmatrani su neformalni oblici e-učenja primenom veb 2.0 alata. Imajući u vidu specifične karakteristike savremenih studenata, naglašava se mogućnost integracije formalnog i neformalnog učenja u okruženju zasnovanom na tehnologijama. U tom kontekstu je veoma važno objasniti specifičnosti neformalnog učenja, kao i načine njegove realizacije

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posredstvom informaciono-komunikacionih tehnologija. Upravo zato je poseban osvrt dat na različite mogućnosti primene e-učenja i to korišćenjem veb 2.0 alata.

Svakodnevno, u svom životu i radu, ljudi koriste neke od veb 2.0 alata, nekada za zabavu, ali sve češće i za učenje. Ideja je iskoristiti već stečene navike koje pojedinci imaju u korišćenju pojedinih alata i posebno istaći njihove potencijale za e-učenje. Stoga je neophodno prikazati sve one veb 2.0 alate koji se mogu koristiti u funkciji učenja, a to su blogovi, viki zasnovane stranice, deljivi mediji, društvene mreže, društvene grupe, obeležavanje, tagovanje, veb agregatori i dr. Kao jedan od načina struktuiranja neformalnog e-učenja 2.0 razmatra se upravo primena koncepta formiranja ličnog okruženja za učenje kao modaliteta u kome osoba sama dizajnira svoje učenje i uključuje neformalno učenje. Specifično, ovaj koncept dobija na funkcionalnosti kada se kreira od velikog broja veb 2.0 alata. Kako primena koncepta ličnih okruženja za e-učenje 2.0 predstavlja okruženje za učenje današnjih studenata, budućih zaposlenih, predlaže se njegovo korišćenje i u modernom obrazovanju.

### Savremeni pristupi neformalnom učenju

Kako je u osnovi svakog obrazovnog procesa učenje, danas u aktuelnoj literaturi više ne govorimo o klasifikaciji obrazovanja, već o klasifikaciji učenja, tako da se učenje u odnosu na to gde se svrsishodno učenje odvija može klasifikovati na formalno (*Formal*), neformalno (*Nonformal*) i informalno (*Informal*) (Rubenson, 2011).

Formalno učenje je sistematizovano i struktuirano, obavlja se institucionalno i praćeno je diplomom. Obavlja se u okviru procesa formalnog obrazovanja (Rubenson, 2011). Često se izvodi u učionici sa instruktorom ili trenerom (nastavnikom), koji planira, sprovodi i ocenjuje sprovođenje učenja (Merriam & Caffarella, 1991, prema Conlon, 2004). Formalno učenje je ono koje se javlja u organizovanim i struktuiranim sredinama i eksplicitno je dizajnirano kao učenje (u smislu ciljeva, vremena i resursa). Ono je namerno sa aspekta osobe koja uči i tipično vodi ka validaciji i sertifikaciji. Kao takvo, ima jasne ciljeve: sticanje znanja, veština i kompetencija. Tipičan primer ovakvog učenja je učenje koje se javlja u okviru obrazovnog sistema. Neki ga još i nazivaju „obrazovanje i obuka u formalnom okruženju“ (OECD, 2010).

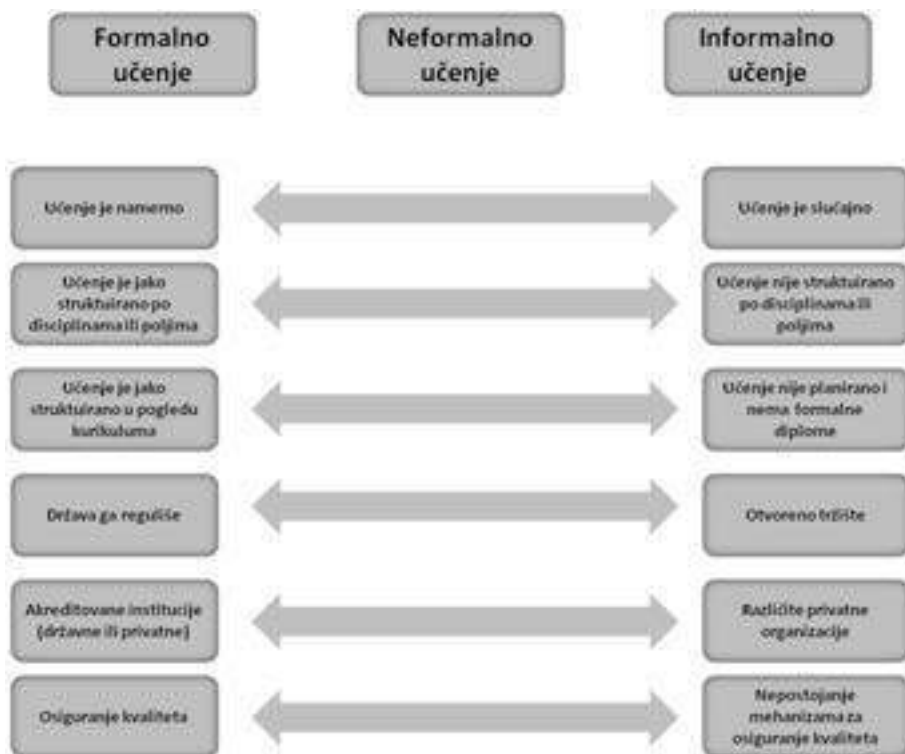
Za razliku od formalnog i neformalnog učenja, koji su namerni iz perspektive polaznika, informalno učenje nije struktuirano (Rubenson, 2010). Što znači da je ono nenamerno, da može biti nusprodukt drugih aktivnosti, da nije u potpunosti svesno, kao i da je često slučajno (Conlon, 2004). Ako se ima u



vidu prethodno, može se reći da je informalno učenje ono učenje koje proizilazi iz svakodnevnih aktivnosti vezanih za rad, porodicu i slobodno vreme. Nije organizovano niti strukturirano u smislu ciljeva, vremena ili resursa za učenje. Ideja se zasniva na tome da su ljudi od svog postanka stalno izloženi situacijama u kojima se uči. Često ga nazivaju i „učenje iz iskustva“ ili samo „iskustvo“ (OECD, 2010). Odnosno, možemo ga odrediti kao „iskustvo“ ili kao „nenamerno“ učenje koje se dešava, a da pojedinac nije ni svestan znanja ili veština koje je usvojio (Mikanović i Oljača, 2010).

Neformalno učenje se odnosi na učenje koje je pretežno eksperimentalno i vaninstitucionalno (Conlon, 2004). Ono nije praćeno sertifikatima, ali je strukturirano i može se realizovati na radnom mestu (Rubenson, 2011). Ističe se da je planirano, ali često nije eksplicitno dizajnirano kao učenje, u smislu ciljeva, vremena ili resursa za učenje. Nasuprot formalnom učenju, neformalno je takvo da osoba kontroliše sopstveno učenje (Cseh et al., 1999, prema Conlon, 2004) i namerno je sa tačke gledišta osobe koja uči. Radi detaljnijeg razjašnjenja pojma neformalnog učenja, u studiji OECD-a prikazano je da se neformalno učenje faktički nalazi negde između formalnog i informalnog učenja (Slika 1), odnosno da se ono može predstaviti kao takvo učenje kojim se daje određeni nivo formalnosti informalnom učenju (OECD, 2010).

Jedan od najčešćih problema kod neformalnog i informalnog učenja jeste sertifikacija, odnosno priznavanje ishoda učenja. Upravo je to osnovno pitanje koje je razmatrano u studiji OECD-a: Kako priznati ili adekvatno formalizovati, u smislu diploma i sertifikata, ishode učenja stečene neformalnim ili informalnim učenjem? U ovoj studiji ishodi učenja su definisani kao znanja, veštine i kompetencije koja su ljudi stekli kao rezultat učenja i mogu ih demonstrirati, ako je potrebno, u procesu priznavanja. Ono što ova studija pokazuje jeste da su ishodi učenja, odnosno znanja, veštine i kompetencije stečena slučajnim i neformalnim učenjem jako značajna, ali da je problem kako ih izmeriti i priznati (OECD, 2010). Ako se složimo da je značaj ovakvog učenja veliki, kao i da su ishodi takvog učenja često izuzetno vrednovani od strane kompanija, postavlja se pitanje kako uvrstiti principe i aktivnosti takvog učenja i iskoristiti njegove benefite u okviru formalnog koncepta učenja. Možda bi se uključivanjem neformalnog i informalnog učenja u formalni obrazovni proces prevazišao problem priznavanja i sertifikacije, a uvrstile određene koristi neformalnog i informalnog učenja.



Slika 1: Kontinuum učenja – od formalnog do informalnog učenja (OECD, 2010)

Za potrebe ovog rada, kao neformalno učenje će se posmatrati i neformalno i informalno jer, kada učimo posredstvom tehnologija, nemoguće je tvrditi da se kroz neformalno učenje ne realizuje i informalno (spontano, odnosno slučajno).

## Veb 2.0

Veb 2.0 (*eng. Web 2.0*) predstavlja drugu generaciju veba (*eng. World Wide Web*) u okviru koje je korisnicima omogućeno da aktivno učestvuju u kreiranju sadržaja, zatim je dozvoljena dvosmerna komunikacija između korisnika, kao i saradnja i razmena informacija (Clara & João, 2010). Kao što se u mnogim člancima navodi, suštinska razlika između koncepata veb 1.0 i veb 2.0 nije u velikom tehnološkom razvoju, već u načinu korišćenja. Mnoge tehnologije nisu zaista nove, ali se drugačije koriste. Po mišljenju Downesa (2005), veb 2.0 je više socijalna nego

tehnološka revolucija i od velikog značaja su način razmišljanja i stavovi onih koji ga koriste. veb, u suštini, prelazi iz toga da je samo medij preko koga su se informacije slale i obrađivale u platformu na kojoj se sadržaji kreiraju, dele, prerađuju i prosleđuju. Veb se praktično transformiše iz takozvanog čitajućeg veba (*eng. The Read Web*) u „veb za čitanje i pisanje“ (*eng. Read-Write Web*) (Downes, 2005). Često se kao sinonim za veb 2.0 koristi i termin društveni mediji ili društveni softver. Sintagma društveni mediji se široko koristi za definisanje različitih umreženih alata i tehnologija kojima se naglašavaju socijalni aspekti interneta kao kanala komunikacije, kolaboracije i kreativnog izražavanja (Dabbagh & Reo, 2011).

Kada je obrazovanje ili učenje posredovano tehnologijama, govorimo o elektronskom obrazovanju (e-obrazovanje) i o elektronskom učenju (e-učenje). E-učenje se odnosi na korišćenje internet tehnologija radi unapređenja znanja i performansi. Stoga se može reći da je e-učenje forma učenja na daljinu, ali to ne znači da je i učenje na daljinu uvek e-učenje (Rosenberg, 2001). Elektronsko učenje koje se realizuje korišćenjem veb 2.0 aplikacija nazvano je e-učenje 2.0 (Downes, 2005).

U okviru ovog rada fokus je stavljen na različite veb 2.0 alate pomoću kojih se e-učenje može realizovati, i to ne na tehnologije koje obeležavaju veb 2.0, već na alate i aplikacije koji se pomoću tih tehnologija realizuju, a korisnici ih kao takve prepoznaju. Takođe, neće biti prikazani svi veb 2.0 alati i aplikacije, već samo oni koji se najčešće koriste za učenje i čine savremeno okruženje za e-učenje 2.0.

Najčešći alati i tehnologije koji se koriste za e-učenje 2.0 su: blogovi, viki zasnovane stranice, deljivi mediji, društvene mreže, društvene grupe, obeležavanje, tagovanje, veb agregatori i dr. Prikaz veb 2.0 alata i njihovih potencijala za e-učenje dat je u nastavku.

1. Blogovi (*eng. Blogs*) se mogu definisati kao sistem koji autor (ili ponekad, ali veoma retko, grupa autora) koristi za pisanje i javno publikovanje članaka (Clara & João, 2010). Blog je idealan alat za diskutovanje i razmenu ideja na mreži, može se koristiti individualno ili kolektivno i veoma je lak za kreiranje i ažuriranje. Danas se najčešće koriste automatizovani veb-sajtovi za kreiranje blogova, koji koriste napredne programske sisteme za automatsko formiranje veb-stranica korišćenjem internet tehnologija. Za ovakvo kreiranje i ažuriranje blogova nije potrebno znanje iz oblasti programiranja (tehnička znanja), već je dovoljno da se kroz unapred definisane forme izvrši unos teksta, što je značajno uticalo na široku primenu bloga među ljudima različitih struka, znanja i obrazovanja. Blogove, pored jednostavnog načina kreiranja i ažuriranja, karakterišu i jednostavan način kome-

tarisanja sadržaja na blogu od strane njegovih čitalaca, jednostavan način promocije blogova putem tzv. deljenja sadržaja (*eng. Syndication*), različiti načini povezivanja blogova i njihovih sadržaja i veoma jednostavan način praćenja (Varagić, 2010).

2. Viki (*eng. Wiki*) je veb-sajt (ili kolekcija veb-stranica) koji je dizajniran tako da svako ko mu pristupi može da menja i uređuje sadržaj koji se na njemu nalazi i na taj način doprinese razvoju sajta (Vikipedija Srbija, 2011). Viki omogućava da jedan ili više korisnika izgrade (kreiraju) korpus znanja u skup međusobno povezanih veb-stranica. Istaknut primer i jedan od najpoznatijih vikija je slobodna enciklopedija *Vikipedija*. U obrazovanju se *viki* može koristiti za diskusije, *brainstorming*, kolaborativne projekte ili deljenje listi. Za e-učenje 2.0 viki: a) omogućava ostvarivanje saradnje na nivou cele grupe (repozitorijum lekcija, ponovno stvaranje priručnika, rečnici); b) obezbeđuje mogućnost dinamičke interakcije između obe grupe – kolega i nastavnika (uključivanjem komentara, sugestija i korekcije); c) omogućava korisnicima da vide istoriju svih modifikacija, što pomaže nastavniku/instruktoru da proceni napredak i d) omogućava kreiranje struktura znanja koje se dele u zajednici za učenje (Clara & João, 2010).
3. Deljenje multimedijalnih sadržaja (*eng. Shared media*) koristi se za skladištenje audio i video materijala od strane korisnika, omogućava korisnicima njihovo pretraživanje i prikazivanje različitih tipova sadržaja. Najpoznatiji primeri za deljenje multimedijalnih sadržaja su *podcasts*, *videocasts*, *video sharing*, *art sharing* i *document sharing*. Nastavnici mogu koristiti potkastove za snimanje i objavljivanje različitog nastavnog materijala. Videokastovi i alati za deljenje video-sadržaja kao što su *You Tube* ili *TeacherTube* omogućavaju korisnicima da jednostavno postavljaju i komentarišu video-materijale na vebu. Nastavnici mogu koristiti ove alate da postavljaju različite video-materijale za e-učenje (Clara & João, 2010).
4. Zajednički (deljivi) radni prostor (*eng. Shared workspace* ili *eng. Collaborative workspace*) je oblast hostovana na veb-serveru, gde kolege mogu da dele dokumente i informacije, održavaju liste relevantnih podataka i informišu se o statusu trenutnog projekta (Microsoft, 2011). Odnosno, predstavlja jedno povezano radno okruženje u kome svi učesnici, bez obzira na svoju lokaciju, mogu da pristupe sadržaju, menjaju ga i komuniciraju jedni sa drugima. Među najpoznatijim aplikacijama su: *Microsoft SharePoint*, *GoogleDocs* kao i *Dropbox*.

5. Društvene mreže (*eng. Social networks*) odnose se na sisteme koji omogućavaju ljudima da se međusobno umrežavaju (povezuju) i dele resurse jedni sa drugima (Clara & João, 2010). Odnosno, društvene mreže predstavljaju virtuelne ili onlajn mreže ljudi. U zavisnosti od svrhe kojoj služe mogu se klasifikovati na sajtove koji su orijentisani na slobodno vreme, zabavu i druženje (kao na primer: *MySpace, Facebook, Friendster, Mixi, Cyworld, Bebo, Orkut* ili *Windows Live Space*) i sajtove za profesionalno povezivanje koji se fokusiraju na poslovno umrežavanje (kao na primer: *LinkedIn, Ecademy, Xing* ili *Visible Path*). U kontekstu e-učenja 2.0, društvene mreže se mogu koristiti kao platforma za (Chaka, 2010): a) uspostavljanje profesionalnih i privatnih kontakata; b) formiranje mreža za učenje i povezivanje; c) povezivanje i umrežavanje kolega radi učenja; d) distribuirano i društveno učenje; e) razvoj kolaborativne kulture; f) povezivanje sa ekspertima; g) objavljivanje najčešće deljenih aktivnosti (npr: konferencije, vebineri, pisanje radova/knjiga) i učešće u njima; h) razmenu znanja, stavova i mišljenja; i) profilisanje institucija i jačanje njihovog imidža, ugleda i identiteta; j) marketing, oglašavanje i promovisanje institucionalnih proizvoda i usluga (programi, kursevi, moduli...); k) regrutovanje i razmatranje potencijalnih kandidata, studenata ili partnera.
6. U okviru većine društvenih mreža postoji mogućnost udruživanja i u društvene grupe (*eng. Social groups*). Grupe mogu biti otvorene i zatvorene. Otvorene društvene grupe karakteriše to da svako može postati njen član. Da bi neko postao član zatvorene društvene grupe, mora da pošalje zahtev za pristupanje grupi, koju odobrava vlasnik grupe. Ponekad postoje preduslovi za pristupanje nekim grupama – da ste zaposleni u određenoj kompaniji ili studenti nekog univerziteta. Vlasnik grupe može tražiti dokaz o zadovoljenju potrebnih uslova za pristupanje grupi. Po pristupanju članstvu neke grupe, može se selektovati dobijanje informacija o svim aktivnostima u toj grupi putem elektronske pošte (Otnes, 2011). Koristi koje studenti mogu imati udruživanjem u društvene grupe odnose se, pre svega, na mogućnost upoznavanja eksperata za određene oblasti, praćenje njihovih radova, kao i pristup informacijama dostupnim samo članovima određene grupe.
7. Društveno obeležavanje (*eng. Social Bookmarking*) je obeležavanje kome je ukinuta barijera samo jednog korisnika (Newson, Houghton & Patten, 2009), odnosno konceptu klasičnog obeležavanja dodaje se mogućnost korišćenja od strane više korisnika. Servis društvenog

obeležavanja, u stvari, ima ulogu prostora za skladištenje obeleženih stranica. Obeležene stranice mogu se čuvati u strogoj privatnosti i može im se pristupiti sa bilo kog mesta. Ovi servisi dostižu svoju pravu vrednost uključivanjem i korišćenjem opcije deljenja prostora za skladištenje. Društveno obeležavanje može biti veoma značajan istraživački alat. Osnovni tip istraživanja je, u stvari, pregledanje obeleženih stranica koje su drugi ljudi sačuvali u okviru odabrane kategorije. Ovo može biti odličan način za pregledanje novih izvora informacija za koje nismo znali, a smatraju se relevantnim. Neki onlajn servisi koriste kocept društvenog obeležavanja kao osnovu za kreiranje sajtova zasnovanih na sadržaju (*content sites*). Suština je u tome da se prikazuju oni sadržaji koji su najbolje rangirani od strane korisnika. Najbolji primeri su *Del.icio.us* i *Digg*.

8. Jedna od karakteristika alata 2.0 jeste upravo mogućnost tagovanja (*eng. Tagging*). Tagovanje je aktivnost koja se upotrebljava kada korisnici žele da dodele sopstvene ključne ili opisne reči određenim elementima na veb-sajtu da bi, kao takvi, bili lakši za pretraživanje i pronalaženje od strane korisnika. Tagovanje daje korisnicima mogućnost da definišu kako su informacije na sajtu organizovane i kako im se može pristupiti. Neki od alata koji koriste tagovanje su blogovi, sajtovi za društveno obeležavanje, kao i sajtovi za deljenje foto i video zapisa. Tagovanjem različiti korisnici mogu zajedno organizovati već povezane informacije koje su dostupne kroz različite izvore. Dodeljivanjem istih tagova jednostavno se kreiraju veze između slika, dokumenata ili drugih digitalnih informacija koje bi inače bile potpuno nepovezane (Shelly & Frydenberg, 2011).
9. Veb-agregatori, koji se drugačije nazivaju i RSS čitači (*RSS readers*), koriste se za praćenje ili prikupljanje *RSS-Feed-a* (*eng. Really Simple Syndication*). Oni se koriste za automatsko ažuriranje i prikazivanje podataka, informacija, odnosno vesti sa onih sajtova na koje smo prijavljeni putem RSS-a. Najpoznatiji RSS čitači su: *Google Reader*, *FeedDemon*, *Bloglines*, *Feedreader* i *NewsGator*. Osnovna prednost veb-agregatora je u tome što korisnicima obezbeđuju: 1) mogućnost da pristupaju mnogim informacijama (*feed-ovima*) sa jedne veb-stranice; 2) mogućnost integracije *feed-ova* treće strane i 3) personalizaciju (Lakhtaria & Nagamalai, 2010).

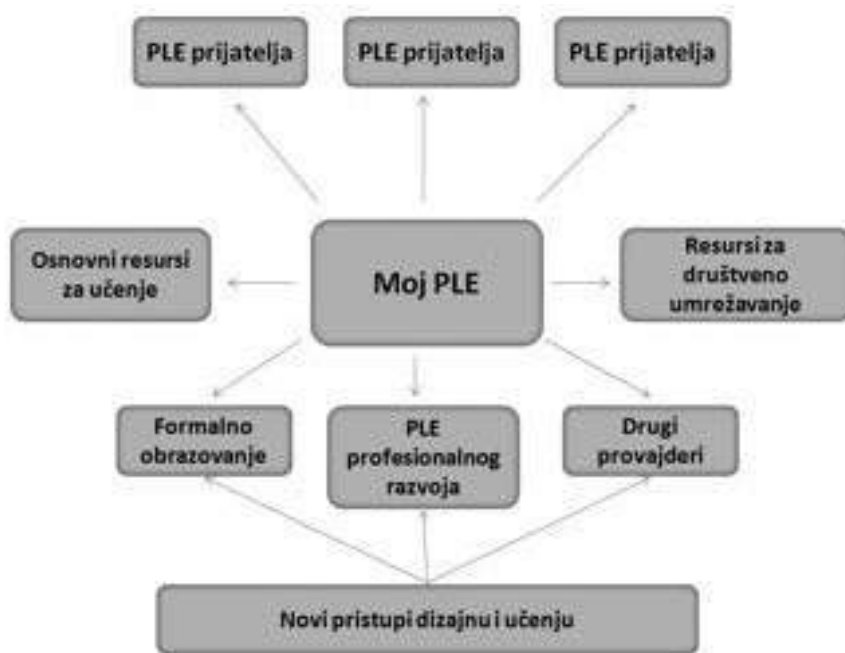
## Formiranje ličnog okruženja za e-učenje 2.0

Lično okruženje za učenje (*eng. Personal Learning Environment – PLE*) je termin koji se koristi za definisanje novog pristupa učenju, odnosno njime se objašnjava jedan od načina transformacije učenja korišćenjem savremenih tehnologija i veb 2.0 platformi koje su trenutno raspoložive. Chatti i drugi (2010) smatraju da se PLE najbolje može objasniti na osnovu 3P modela za učenje (3P – *Personalization, Participation and Knowledge-Pull*): personalizacija, participacija i pul znanja. Lično okruženje za učenje ne predstavlja softversku aplikaciju ili tehnički pristup učenju, već se može reći da je to filozofski, etički i pedagoški/andragoški pristup (Attwell, 2007), koji bi trebalo da podstiče studente da razvijaju svoje sposobnosti kao nezavisni pojedinci u stuktuiranom kontekstu (Anđelković Labrović, Bijelić i Milosavljević, 2014). Suština je u tome da studenti sami dizajniraju prostor za učenje, biraju način prikupljanja znanja (najčešće u onlajn okruženju) i razmenjuju korisne informacije.

Chatti i drugi (2010) ističu da je PLE nova vizija učenja i kocept u nastajanju, kojim je učinjen značajan pomak prema konstruktivističkom i konektivističkom učenju koji stavlja studenta u centar i daje mu više autonomije i kontrole u organizovanju sopstvenog učenja. Lično okruženje za učenje nije nešto što se nameće pojedincu, već ga on samostalno gradi tako da odgovara njegovim potrebama i njegovom stilu učenja. Samousmerenost se odnosi na mogućnost izbora resursa za učenje, kao i načina učenja: vreme, mesto i kontekst učenja (Clara & João, 2010). Primenom ovog koncepta studenti bi trebalo da: a) postavljaju sopstvene ciljeve za učenje; b) upravljaju učenjem u smislu sadržaja i procesa učenja i c) uspostavljaju komunikaciju sa drugima u procesu učenja i na osnovu toga postignu ciljeve učenja (Chatti, Jarke & Specht, 2010).

PLE se sastoji od različitih alata društvenih medija čijim korišćenjem studenti mogu sticati znanja i kompetencije bez obzira na to da li taj alat koriste za interakciju sa drugim studentima u vezi sa projektima ili jednostavno traže informacije u vezi sa projektom na kome rade. Ključna funkcija PLE-a jeste da osoba koja uči kreira onlajn identitet gde kroz personalizovano okruženje za učenje efektivno spaja formalno i informalno učenje (Dabbagh & Kitsantas, 2012). Izgled prosečnog PLE-a može se videti na slici (Slika 2). Hall (2009) predlaže da formalno i informalno učenje treba da budu povezani radi optimizacije učenja i zaključuje da je učenje najefektivnije kada se uči kroz formalne i informalne aktivnosti. Attwell (2007) ukazuje da PLE može da se posmatra kao način na koji individue organizuju svoje učenje u različitim kontekstima gde se informalno učenje može koristiti kao suplement formalnom, takođe dodaje da PLE ima veoma važnu ulogu u razumevanju e-učenja. Dok korišćenje veb 2.0 tehnologija

utiče na povećavanje neformalnog učenja studentata, PLE se može smatrati kao obećavajući pedagoški/andragoški pristup za namernu ili nenamernu integraciju formalnih i informálnih okruženja za učenje.



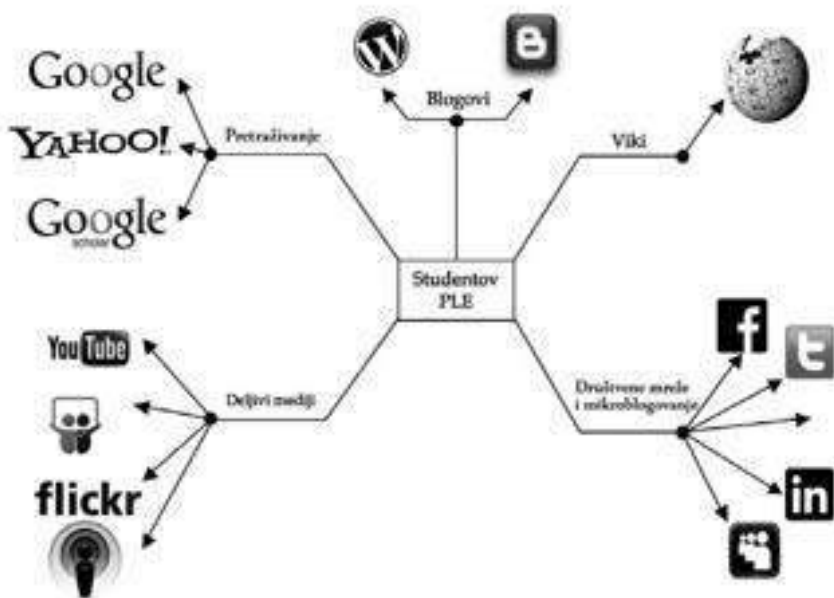
Slika 2: Dinamika resursa u ličnom okruženju za učenje (Dabbagh & Kitsantas, 2012)

Jedino što je neophodno za uspostavljanje ličnog okruženja za učenje jeste pristup internetu radi prikupljanja podataka i definisanje strukture PLE-a. Uspostavljanje svog PLE-a vrlo je jednostavno i potrebno je pratiti sledeća tri koraka (Anđelković Labrović, Bijelić & Milosavljević, 2014):

1. Identifikujte tri stvari koje želite/morate da naučite.
2. Identifikujte tri resursa koja Vam odgovaraju za učenje i
3. Dokumentujte svoj PLE.

Za razvoj PLE-a je posebno potreban razvoj i primena veština za samoregulisano učenje jer se PLE gradi odozdo nagore, počevši od ličnih ciljeva, upravljanja informacijama i individualnom konstrukcijom znanja napredujući prema društveno posredovanom znanju i umreženom učenju (Dabbagh & Reo, 2011). Primer PLE-a sačinjen od veb 2.0 alata dat je na slici (Slika 3).





Slika 3: Primer PLE-a studenta sačinjen od različitih veb 2.0 alata (Anđelković Labrović, 2014)

### Karakteristike i funkcionalnosti ličnih okruženja za učenje

Kao jedan od najvažnijih elementa PLE-a navodi se *kontrola od strane studenta*. Lično okruženje za učenje omogućava kontrolu sadržaja koji se iznosi, dizajniranje prostora i interakciju sa ostalim individuama i institucijama. Uvažava samoupravljački pristup i samokontrolu u učenju. Drugi element PLE-a je *raznovrsnost resursa* kojima se pristupa i kontroliše. Da bi se postigao najviši nivo upotrebe ovakvog prostora u kome se uči, resursi moraju biti u saglasnosti sa standardima, tako da mogu da se iskoriste u različitim sistemima. Najveći deo resursa dostupnih PLE-u preko interneta jesu u skladu sa standardima (Skrabut, 2008).

Jedna od najmoćnijih osobina PLE-a je *spособnost agregiranja resursa* jer olakšava korišćenje resursa, što ide u korist studentu. Ti resursi mogu biti ljudi, dokumenti ili alati za učenje. Lično okruženje za učenje ima odgovornost za koordiniranje različitih tehnologija i omogućava studentima selektovanje aktivnosti i usluga koje oni žele, što treba da predstavlja dodatak svim institucijama koje nameravaju da uvedu PLE kao osnovni sistem sticanja znanja (Skrabut, 2008).

Ključ za dobar PLE je spoj sa socijalnim umreženjem. Taj spoj ne treba biti drugačiji za formalno i neformalno učenje. Učenje kroz mrežu obuhvata prikupljanje, organizovanje, objavljivanje, identifikaciju korisnih informacija, komunikaciju i konferencije. Za jaku mrežu za učenje potrebna je raznovrsnost, tako da se prikažu različite perspektive različitih ljudi, potrebna je autonomija, tako da svako lice radi nezavisno od drugog, zatim povezanost, tako da svaka individua može da komunicira slobodno sa ostalim individuama, i otvorenost, tako da svaka osoba može slobodno da komunicira bez ikakvih ograničenja (Skrabut, 2008).

Personalizovano učenje predstavlja razmišljanje na višem nivou, urođenu kreativnost i refleksivne procese. Pojedinačni studenti mogu biti jedinstveno prepoznati, sadržaji specifično prezentovani, a napredak svakog studenta individualno praćen, podržan i evaluiran. Lično okruženje za učenje može obezbediti visok nivo personalizacije u učenju, šanse za inovacije, čime se podstiču intelektualne sposobnosti i kreativnost pojedinca. Idealan PLE studentima obezbeđuje (Li & Gu, 2009):

1. *Mogućnost kreiranja ličnog plana za učenje.* Lični plan za učenje (*Personal Learning Plan – PLP*) je plan koji je dizajniran da pomogne studentu da donese odluke o svom ličnom razvoju, o obrazovanju i treningu, odnosno formalnom i neformalnom učenju. PLE će pomoći studentima da naprave sopstveni plan, koji mogu da menjaju i koriste tokom čitavog procesa učenja.
2. *Usklađivanje ličnih resursa za učenje.* RSS (*Really Simple Syndication – RSS*), takozvano veoma jednostavno distribuiranje, definiše jednostavan način za pronalazjenje pojedincu interesantnih informacija i sadržaja, što omogućava prikaz raznih platformi i mreža iz ugla pojedinca. RSS je važna funkcija koju PLE omogućava različitim studentima. Studenti će moći da grade sopstvene onlajn baze znanja, štaviše, nastavnici će moći da stvore resurse, označe (taguju) ih i tako učine dostupnim za studente.
3. *Upravljanje ličnim procesom učenja.* Lično okruženje za učenje može da zabeleži i upravlja procesom učenja pojedinca uz pomoć pratećih informacionih tehnologija, kao što je snimanje ličnog razvoja (*Personal Developing Record – PDR*). Ova funkcija može biti slična LMS-u, kao što su *Moodle* i *Sakai*, međutim, razlika u odnosu na LMS je što ovde nije nastavnik u centru, već student.
4. *Komunikacija i saradnja.* PLE je dizajniran da poboljša interakciju između studenta i nastavnika uključujući komunikaciju i saradnju. Pored toga, ove interakcije mogu služiti kao moćno sredstvo za razmenu mišljenja i komentara.

Kompen i drugi (2008), kao osnovne prednosti PLE-a, navode sledeće:

- PLE integriše formalno učenje sa životom van obrazovnih institucija.
- Služi kao digitalni zapis procesa učenja jer PLE ne nestaje na kraju procesa učenja.
- PLE može biti prilagođen i povezan sa ostalim aplikacijama, u skladu sa potrebama studenata.
- Na napredovanje u toku učenja (kriva učenja) utiče i stepen ovladavanja korišćenja različitih veb 2.0 alata.
- PLE je u vlasništvu pojedinca, njime upravlja pojedinac, što dovodi do osećaja i praktične primene samousmerenja tokom obrazovanja. Doprinosi PLE-a se mogu koristiti ponovo koliko god puta je to potrebno.
- PLE obezbeđuje korisnicima društvenu dimenziju unutar sopstvenog sistema.
- PLE komponente se konstantno unapređuju.
- PLE je tako dizajniran da prvenstveno podržava doživotno učenje.

Neke od prepreka pri razvoju PLE-a mogu biti sledeće (Kompen, Edirisingha & Mobbs, 2008):

- *Podrška.* Može se dogoditi da usled korišćenja velikog broja različitih aplikacija dođe do visokog nivoa kompleksnosti. Međutim, ipak se smatra da su nove generacije familijarne sa različitim tehnološkim alatima jer ih svakodnevno koriste, alati su veoma intuitivni, a korisnici u najvećem broju samouki.
- *Pogodnost i tehnološka složenost.* Može se dogoditi da korisnici izaberu pogrešnu tehnologiju ili alat za određeni zadatak iako je poenta izbora i raznovrsnosti upravo u tome da izaberu alat koji im najviše odgovara.
- *Interkonektivnost.* Alati i aplikacije nisu dizajnirani za razmenu podataka, mada dodatne funkcionalnosti i aplikacije pomažu korisnicima da uspostave veze između različitih alata.
- *Privatnost.* Studenti nerado dele sopstvena okruženja i virtuelni prostor sa nastavnicima. Ali, treba podstaći korišćenje ovih alata za deljenje i komunikaciju sa ekspertima, kolegama i širom zajednicom.

Kako bi se eliminisale neke od potencijalnih prepreka, predlaže se da nastavnici preuzmu vodeću ulogu u formiranju PLE-a. Međutim, njihova uloga u tome se transformiše u vodiče, odnosno u one koji će okupljati i savetovati. Oni mogu pomoći studentima da steknu veštine kroz kratke i korisne zadatke, kroz sisteme rada u grupama gde se uparuju razna iskustva koja se drugačije ne bi iskazala i gde se kreira temeljna dokumentacija za implementaciju rešenja. Na kraju,

studenti su sposobni da sami organizuju svoj prostor bez pomoći, mada nekima možda zatreba podrška na početku.

### Primena koncepta ličnog okruženja za e-učenje 2.0

Väljataga i drugi (2011) su sproveli studiju u okviru koje su studenti ocenjivali dizajn akademskog kursa baziranog na društvenim medijima, odnosno pedagoške/andragoške potencijale (*affordances*) društvenih medija pri razvoju ličnih okruženja za učenje. Studenti su samostalno birali alate društvenih medija za kreiranje ličnog okruženja za učenje (PLE) i distribuiranog okruženja za učenje (*Distributed Learning Environment – DLE*) da bi uradili sve individualne i grupne zadatke za učenje u okviru predmeta. Autori razlikuju PLE i DLE objašnjavajući da studenti sa svojim ličnim okruženjima za učenje, radi kolaboracije, formiraju distribuirano okruženje za učenje. *Affordances* su u ovoj studiji definisani kao signali za akciju ili akcioni potencijali koji su evocirani različitim tehnologijama u okruženju za učenje i koji se dinamično menjaju pod uticajem ciljeva učenja studenata, zadataka, interakcije sa drugim studentima i, naravno, moderatora kursa. Istraživanje pokazuje da, kao važne aspekte dizajniranja kursa, instrukcioni dizajneri treba da uzmu u obzir percepciju studenata i njihova očekivanja od okruženja za učenje. Zatim, studente treba podstaći i ohrabriti da razvijaju veštine i samopouzdanje pri selekciji, primeni i korišćenju alata i usluga za personalizovano učenje. Takođe, treba istražiti nove pedagoške modele i pristupe koji stavljaju studenta u centar i poboljšavaju sposobnosti studenata za organizovanje i prilagođavanje sopstvenih okruženja za učenje (Dabbagh & Kitsantas, 2012; Väljataga, Pata & Tammets, 2011).

Cigognini i drugi (2011) u svom istraživanju pokazuju da korišćenje društvenih medija u visokom obrazovanju omogućava kreiranje PLE-a, što obezbeđuje studentima osećaj personalizacije u procesu učenja. Međutim, da bi uspešno koristili društveni medij za stvaranje PLE-a, studenti moraju steći i primenjivati set veština za lični menadžment znanja (PKM veštine – *Personal Knowledge Management skills*), odnosno skup veština potrebnih za upravljanje znanjem korišćenjem tehnologija.

Dabbah i Kitsantas (2012) definisali su *okvir za samoregulisano učenje (Self-regulated learning – SRL)* korišćenjem društvenih medija pri kreiranju ličnih okruženja za učenje (PLE), gde oni koncipiraju vezu između SRL, PLE-a i društvenih medija razvijanjem upravo ovakvog pedagoškog/andragoškog okvira. Ovaj okvir baziran je na nivoima interaktivnosti koje društveni mediji omogućavaju. Ti nivoi su: 1) upravljanje ličnim informacijama (*personal information management*);

2) društvena interakcija i kolaboracija (*social interaction and collaboration*) i 3) upravljanje i agregacija informacija (*information aggregation and management*). Dabah i Reo (2012) su koristili Gibsonovu (1977) teoriju – *Theory of affordances* – kojom zagovaraju da upravo društveni mediji imaju takve karakteristike koje omogućavaju korisnicima interakciju i deljenje upravo onoliko koliko im je potrebno za učenje. Ovaj pedagoški/andragoški okvir ima tri nivoa. Na prvom nivou nastavnici treba da podstaknu studente da koriste društvene medije kao što su blogovi i viki za kreiranje PLE-a radi postavljanja ciljeva i planiranja. Cilj ovog nivoa je vođenje studenata pri kreiranju ličnog ili privatnog okruženja za učenje. Drugi nivo je nivo socijalne interakcije i kolaboracije, gde nastavnici treba da podstaknu studente da koriste društvene medije radi realizacije osnovnih aktivnosti deljenja i kolaboracije. Ovaj nivo uključuje studente u procese samoregulacije i samopraćenja sa ciljem identifikacije strategija potrebnih za obavljanje formalnijih zadataka za učenje. Treći nivo je nivo agregacije i upravljanja informacijama. Na ovom nivou nastavnici podstiču studente da koriste društvene medije za sintezu i agregaciju informacija iz prethodna dva nivoa radi refleksije na celokupno iskustvo u učenju. Ovakve aktivnosti na društvenim medijima omogućavaju studentima da preuzmu veću kontrolu nad svojim PLE-om, da ih prilagode i personalizuju u odnosu na sopstvene ciljeve učenja. U tabeli (Tabela 1) su prikazani primeri kako nastavnici mogu voditi studente u korišćenju društvenih medija na svakom od tri pomenuta nivoa.

**Tabela 1:** Okvir za samoregulisano učenje korišćenjem društvenih medija pri kreiranju ličnih okruženja za učenje, preuzeto od (Dabbagh & Kitsantas, 2012)

	Nivo 1 – Upravljanje ličnim informacijama	Nivo 2 – Društvena interakcija i kolaboracija	Nivo 3 – Upravljanje i agregacija informacija
Blog	Nastavnik podstiče studente da koriste blog kao privatni dnevnik radi postavljanja ciljeva učenja i planova za realizaciju zadataka.	Nastavnik podstiče studente da koriste karakteristiku bloga – komentar – kako bi omogućili nastavniku i drugim kolegama davanje povratnih informacija, odnosno baziču interakciju i deljenje.	Nastavnik pokazuje studentima kako da konfiguriraju blog za dodavanje novih sadržaja i kako da uključe blog u RSS usluge.
Vikiji	Nastavnik podstiče studente da koriste <i>viki</i> kao lični prostor za organizaciju sadržaja i upravljanje.	Nastavnik podstiče studente da omoguće karakteristiku <i>vikija</i> za zajedničko uređivanje i komentarisanje radi davanja povratnih informacija.	Nastavnik pokazuje kako se na <i>vikiju</i> može videti istorija radi promovisanja samovrednovanja procesa učenja studenta tokom vremena.

<b>Google Kalendar</b>	Nastavnik podstiče studente da za lično plairanje koriste <i>Google</i> kalendar.	Nastavnik podstiče studente da omoguće karakteristiku <i>Google</i> kalendara za deljenje da bi omogućili davanje povratnih informacija i kolaboraciju pri rešavanju zadataka.	Nastavnik pokazuje studentima kako da arhiviraju lične i grupne kalendare radi promovisanja samovrednovanja u vezi sa planiranjem upravljanja vremenom.
<b>You Tube ili Flickr</b>	Nastavnik podstiče studente da koriste <i>Flickr</i> ili <i>You Tube</i> za postavljanje ličnih snimaka koji su u vezi sa sadržajem kursa.	Nastavnik podstiče studente da omoguće karakteristiku deljenja i pristupe sličnim medijskim sadržajima koji su kreirale kolege.	Nastavnik pokazuje studentima kako da agregiraju različite medijske sadržaje radi poboljšanja lične medijske arhive.
Sajtovi za društveno umrežavanje	Nastavnik podstiče studente da kreiraju profil na <i>LinkedIn</i> -u.	Nastavnik podstiče studente da se uključe u onlajn grupe u skladu sa svojim profesionalnim ciljevima.	Nastavnik traži od studenata da preispitaju (samoposmatranjem), radi restrukturiranja, svoj profil i prisustvo na društvenim mrežama.
<b>Društveno obeležavanje (Social Bookmarking)</b>	Nastavnik podstiče studente da koriste alat za društveno obeležavanje (npr. <i>Delicious</i> ) radi rganizovanja sadržaja kursa.	Nastavnik podstiče studente da sarađuju sa drugim kolegama i kreiraju zajedničku listu obeleživača (markera) u vezi sa specifičnom temom učenja ili projekta.	Nastavnik traži od studenata da preispitaju (samoposmatranjem) svoje obeleživače (markere) radi poboljšanja željenih ishoda učenja.

### Zaključna razmatranja

Chatti i drugi (2010) istakli su personalizaciju, participaciju i pul znanja kao osnovu svakog PLE-a. Kao ključne karakteristike PLE-a navedeni su kontrola od strane studenta, raznovrsnost resursa kojima se pristupa, sposobnost agregiranja resursa i spoj sa socijalnim umreženjem (Skrabut, 2008), dok se, kao najznačajnije funkcionalnosti PLE-a, navode (Li & Gu, 2009): mogućnost kreiranja ličnog plana za učenje, usklađivanje ličnih resursa za učenje, upravljanje ličnim procesom učenja i komunikacija i saradnja. U radu je istaknuto da PLE ne predstavlja softversku aplikaciju ili tehnički pristup učenju, već da je reč o filozofskom, etičkom i pedagoškom/andragoškom pristupu, odnosno načinu na koji individue organizuju svoje učenje u različitim kontekstima, gde se informalno učenje može koristiti kao suplement formalnom (Attwell, 2007). Društveni mediji, odnosno veb 2.0 alati uopšte, sve se više koriste kao alati za razvoj formalnih i neformalnih okruženja za učenje, kao i za konstrukciju i upravljenjem znanjem, za šta se preporučuje formiranje platformi za učenje PLE 2.0. Suština predloženog koncepta jeste da pojedinac samostalno kreira svoje okruženje za e-učenje izborom

različitih veb 2.0 alata koji su mu raspoloživi i koji mu odgovaraju. Takođe, sam postavlja ciljeve, bira tempo, vreme i mesto za učenje, kao i kolege sa kojima će saradivati i na taj način obezbeđuje određeni nivo personalizacije.

Iako se većina do sada sprovedenih istaživanja odnosila na studentsku populaciju, treba istaći da se radi o visokom obrazovanju i populaciji odraslih polaznika, koja po karakteristikama odgovara zaposlenima. Stoga je viđenje autora da se upravo primena ovakvih koncepata treba uvrstiti u obrazovanje pojedinaca, bilo da je reč o obrazovnim sistemima ili učenju u kompanijama. Realizacija obrazovanja na nivou savremenih kompanija oslanja se, u prvom redu, na dizajniranje konteksta, zatim na izvesne strukturne promene primenom savremene tehnologije (promene odnosa u vezi s informisanjem, otvaranje linija komunikacije itd.) te na aktivnosti razvoja ljudskih resursa, koje se smatraju ključnim preduslovima ili pretpostavkama doživotnog obrazovanja i učenja u kompaniji (Alibabić i Ovesni, 2008).

S obzirom na to da je doživotno učenje prepoznato kao krucijalno za društvo znanja, lako se može predviđati da će uskoro svako razvijati svoj PLE ili da to već radi. U tom kontekstu, lična okruženja za učenje treba posmatrati kao permanentna, adaptivna i razvijajuća, prilagodljiva različitim stilovima učenja, u različitim kontekstima i u različitim periodima života, tako da nova generacija studenata koja deli kulturu korišćenja veb 2.0 alata i tehnologija za učenje vidi kreiranje PLE-a od različitih elemenata kao što su blogovi, vikiji i društvene mreže kao potpuno prirodan način učenja i sa takvim stavovima i navikama dolaze u kompanije. Pošto je to slučaj, obrazovanje ne treba da ignoriše prisustvo novog fenomena, već to treba iskoristiti i pronaći način kako ga uvrstiti u svakodnevnu praksu, zatim kako vrednovati tako stečena znanja i kako priznati njihov doprinos ličnom i profesionalnom razvoju.

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## Possibilities for the Application of the Concept of Personal Learning Environments in E-Learning 2.0

**Abstract:** The objective of this paper is to present the different possibilities for the application of modern web 2.0 tools in e-learning. The paper starts by explaining and defining the basic concepts of nonformal learning and e-learning 2.0, going on to explain nonformal learning mediated by technologies. It concludes with an explication of the concept of personal learning environments as a proposal for a contemporary solution for e-learning. An overview is also given of the most commonly-used 2.0 tools, along with the implications for their use in modern education.

**Key words:** nonformal learning, web 2.0, personal learning environments, e-learning 2.0.

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**DOKUMENTI**

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**DOCUMENTS**



## *Svetski obrazovni forum 2015*

### Inčonska deklaracija

# Obrazovanje 2030: Ka inkluzivnom i pravičnom kvalitetnom obrazovanju i celoživotnom učenju za sve

#### Preambula

1. Mi, ministri, šefovi i članovi delegacija, direktori agencija i zvaničnici multilateralne i bilateralne organizacije, kao i predstavnici civilnog društva, nastavničke profesije, omladine i privatnog sektora, okupili smo se u maju 2015, na poziv Generalnog direktora Uneska, u Inčonu u Republici Koreji, na *Svetskom obrazovnom forumu* (WEF<sup>1</sup> 2015). Za pruženi doprinos zahvaljujemo i domaćinima ovog značajnog događaja – Vladi i narodu Republike Koreje, kao i suorganizatorima ovog skupa – Unicefu, Svetskoj banci, UNFPA, UNDP, Organizaciji UN za žene i UNHCR. Iskreno cenimo inicijativu i vođstvo Uneska u sazivanju ovog ključnog sastanka za Obrazovanje 2030.
2. Ovim istorijskom povodom ponovo potvrđujemo viziju svetskog pokreta *Obrazovanje za sve* pokrenutu u Džomtijenu 1990. i ponovljenu u Dakaru 2000, a to je velika posvećenost obrazovanju tokom proteklih decenija, što je pomoglo da se postigne značajni napredak. Takođe ponovo potvrđujemo viziju i političku volju pokazanu u brojnim međunarodnim i regionalnim sporazumima o ljudskim pravima, koji potvrđuju pravo na obrazovanje i njegovu povezanost sa ostalim ljud-

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<sup>1</sup> World Education Forum

skim pravima. Ipak, s velikom zabrinutošću uviđamo i da smo daleko od ostvarenja cilja obrazovanja za sve.

3. Podsećamo se *Sporazuma iz Muskata*, razvijenog i usvojenog posle širokih konsultacija na svetskom sastanku *Obrazovanje za sve* (EFAF<sup>2</sup>) 2014, koji je služio kao osnova za predložene obrazovne ciljeve *Otvorene radne grupe za Ciljeve održivog razvoja* (SDG<sup>3</sup>). Podsećamo se i zaključaka regionalnih ministarskih konferencija o obrazovanju nakon 2015, kao i nalaza *Globalnog izveštaja o monitoringu*<sup>4</sup> WEF 2015. i *Regionalnog sinteznog izveštaja* WEF. Uviđamo važni doprinos globalne inicijative *Obrazovanje na prvom mestu*<sup>5</sup> kao i ulogu vlada i regionalnih, međuvladinih i nevladinih organizacija u podsticanju političke posvećenosti obrazovanju.
4. Nakon što smo proučili postignuti napredak u ostvarenju ciljeva WEF od 2000. i ciljeva vezanih za obrazovanje u okviru *Milenijumskih ciljeva razvoja* (MDG) kao i naučene lekcije, nakon što smo ispitali preostale izazove i proučili predloženu agendu za obrazovanje do 2030, kao i *Okvirni plan akcije*<sup>6</sup> i buduće prioritete i strategije za njegovo ostvarivanje, usvajamo ovu Deklaraciju.

### Prema 2030: nova vizija obrazovanja

5. Naša vizija je da, imajući u vidu ulogu obrazovanja kao glavnog pokretača razvoja, preobrazimo život ljudi i ostvarimo ostale predložene SDG. Svesni hitnih potreba, posvećujemo se jedinstvenoj, obnovljivoj agendi obrazovanja koja je holistička, ambiciozna i ima svakoga u vidu. Ova nova vizija je u potpunosti obuhvaćena predloženim SDG 4: „**Obezbediti inkluzivno i pravično kvalitetno obrazovanje i promovisati mogućnosti celoživotnog učenja za sve**“ i odgovarajućim ciljevima. Ona je preobražavajuća i univerzalna, usmerava pažnju na „nezavršeni posao“ agendi EFA programa i onih MDG koji su se odnosili na obrazovanje, i osvrće se na globalne i nacionalne izazove u obrazovanju. Nadahnuta je humanističkom vizijom obrazovanja i razvoja zasnovanom na ljudskim pravima i dostojanstvu, društvenoj

<sup>2</sup> Education for All

<sup>3</sup> Sustainable Development Goals

<sup>4</sup> Global Monitoring Report (GMR)

<sup>5</sup> Education First

<sup>6</sup> Framework for Action

pravdi, inkluziji, zaštiti, kulturnoj, jezičkoj i etničkoj različitosti i zajedničkoj odgovornosti i pouzdanosti. Potvrđujemo da je obrazovanje javno dobro, osnovno ljudsko pravo i osnova garancije ostvarenja ostalih prava. Ono je od suštinske važnosti za mir, toleranciju, ostvarenje pojedinca i održivi razvoj. Obrazovanje shvatamo kao ključ ostvarivanja pune zaposlenosti i iskorenjivanja siromaštva. Trudićemo se da omogućimo pristup, pravičnost i inkluziju u obrazovanju, kao i njegov kvalitet i rezultate u okviru pristupa koji omogućava učenje tokom celog života.

6. Motivisani značajnim napretkom u omogućavanju **pristupa** obrazovanju tokom proteklih 15 godina, postaraćemo se da omogućimo 12 godina besplatnog, državno finansiranog, pravičnog i kvalitetnog osnovnog i sekundarnog obrazovanja, od čega je najmanje 9 godina obavezno, što će dati odgovarajuće rezultate u učenju. Takođe se zalažemo za obezbeđivanje najmanje jedne godine besplatnog i obaveznog predškolskog obrazovanja i za to da sva deca imaju pristup kvalitetnom razvoju, nezi i obrazovanju u ranom detinjstvu. Zalažemo se za obezbeđivanje relevantnog obrazovanja i mogućnosti osposobljavanja za veliku populaciju dece i adolescenata koji ne pohađaju škole, a kojima je potrebna neposredna, ciljana i neprekidna akcija koja će omogućiti da sva deca pohađaju školu i uče.
7. **Inkluzija i jednakost** u obrazovanju predstavljaju temelje plana za transformativno obrazovanje i stoga se zalažemo za rešavanje svih problema vezanih za isključivost, marginalizaciju, nejednakost i nepravičnost u dostupnosti obrazovanja, učešću u njemu i njegovim ishodima. Nijedan obrazovni cilj ne treba smatrati dostignutim ako ga nisu dostigli svi. Stoga ćemo se posvetiti ostvarivanju neophodnih promena u obrazovnoj politici, usmeravajući napore ka onima koji su u najnepovoljnijem položaju, naročito ka osobama sa invaliditetom, kako niko ne bi bio zapostavljen.
8. Uviđamo značaj **rodne ravnopravnosti** u ostvarivanju prava na obrazovanje za sve. Stoga smo predani podršci politikama, planovima i obrazovnim sredinama koji to imaju u vidu; takođe ističemo pitanja rodne ravnopravnosti u obuci učitelja i nastavnim planovima i težimo eliminisanju rodne diskriminacije i nasilja u školama.
9. Obavezujemo se na **kvalitetno** obrazovanje i poboljšanje rezultata učenja, što zahteva jačanje ulaganja, procesa i procena ishoda i mehanizama kojima se meri napredak. Postaraćemo se da učitelji i predavači budu osposobljeni, adekvatno odabrani, dobro obučeni, profesional-

no kvalifikovani, motivisani i podržani u okviru dobro opremljenih, delotvornih i uspešno vođenih sistema. Kvalitetno obrazovanje potpomaže kreativnost i znanje i obezbeđuje sticanje osnovnih veština pismenosti i računanja, analitičkih i veština rešavanja problema, kao i ostalih naprednih kognitivnih, interpersonalnih i socijalnih veština. Ono takođe razvija veštine, vrednosti i stavove koji građanima omogućavaju da vode zdrav i ispunjen život, donose odluke zasnovane na informisanosti i odgovore na lokalne i globalne izazove zahvaljujući obrazovanju za održivi razvoj (ESD<sup>7</sup>) i globalnom građanskom obrazovanju (GCED<sup>8</sup>). U tom smislu, snažno podržavamo primenu Globalnog akcionog programa za ESD pokrenutog na Uneskovoj Svetskoj konferenciji o ESD 2014. u Nagoji. Takođe podvlačimo značaj obrazovanja i treninga za ljudska prava u ostvarivanju plana o održivom razvoju nakon 2015.

10. Predani smo promovisanju kvalitetnih **mogućnosti za celoživotno učenje** za sve, u svim okruženjima i na svim obrazovnim nivoima. To podrazumeva pravičan i širi pristup kvalitetnom tehničkom i stručnom obrazovanju i obuci, kao i višem obrazovanju i istraživanjima, uz dužnu pažnju posvećenu obezbeđivanju kvaliteta. Pored toga, važno je obezbediti fleksibilne načine učenja, kao i priznavanje, validaciju i potvrdu znanja, veština i stručnosti stečenih putem neformalnog obrazovanja. Trudićemo se da omogućimo svim mladima i odraslima, naročito devojkaama i ženama, da steknu relevantnu i priznatu funkcionalnu pismenost i matematičku pismenost, i životne veštine i da dalje kao odrasli imaju mogućnosti da uče, da se obrazuju i obučavaju. Želimo da osnažimo nauku, tehnologiju i inovaciju. Informativne i komunikacione tehnologije moraju biti u službi jačanja obrazovnih sistema, širenja znanja, pristupanja informacijama, kvalitetnog i efikasnijeg učenja i delotvornijeg obezbeđivanja usluga.
11. Zabrinuti smo zbog toga što danas veliki deo svetske populacije koja se ne školuje živi u konfliktnim oblastima i što krize, nasilje i napadi na obrazovne institucije, kao i prirodne katastrofe i pandemije, i dalje na globalnom planu prekidaju obrazovanje i razvoj. Obavezujemo se da ćemo razviti inkluzivnije, spremnije i otpornije obrazovne sisteme u kojima će biti zadovoljene potrebe dece, mladih i odraslih osoba u ovakvom okruženju, kao i potrebe interno raseljenih i izbeglica. Pod-

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<sup>7</sup> Education for sustainable development

<sup>8</sup> Global citizenship education



vlačimo potrebu da se obrazovanje stiće u bezbednom, sigurnom i ne-nasilnom okruženju koje će pružiti podršku. Preporučujemo efikasni odgovor na krizu, od neposrednog reagovanja do obnove i ponovne izgradnje; bolje koordiniranu nacionalnu, regionalnu i globalnu reakciju i razvoj kapaciteta za sveobuhvatno smanjenje i ublažavanje rizika kako bi se obrazovanje nastavilo i za vreme sukoba, vanrednih situacija, nakon sukoba i tokom perioda obnove.

## Sprovođenje zajedničke agende

12. Podvlačimo da glavnu odgovornost za uspešnu primenu ove agende nose vlade. Rešeni smo da utvrdimo pravne i političke okvire koji će promovisati odgovornost i transparentnost, otvorenu upravu i koordinirana partnerstva na svim nivoima i sektorima, kao i da podržimo pravo učesća svih interesenata.
13. Pozivamo na snažnu globalnu i regionalnu saradnju, koordinaciju i nadgledanje primene agende obrazovanja zasnovane na prikupljanju podataka, analizi i izveštavanju na državnom nivou, u okvirima regionalnih entiteta, mehanizama i strategija.
14. Svesni smo da uspeh agende obrazovanja 2030 zahteva doslednu politiku i planiranje, kao i efikasno sprovođenje. Takođe je jasno da se težnje sadržane u predloženom SDG 4 ne mogu ostvariti bez značajnog i dobro usmerenog povećanog finansijskog ulaganja, naročito u zemljama koje su najdalje od postizanja kvalitetnog obrazovanja na svim nivoima i za sve. Stoga smo rešeni da povećamo državna ulaganja u obrazovanje, u skladu sa situacijom u zemlji, i podstičemo privrženost međunarodnim i regionalnim merilima po kojima se najmanje 4-6% BDP-a i/ili najmanje 15-20% ukupne javne potrošnje izdvaja za obrazovanje.
15. Imajući u vidu značaj partnerstva u dopunjavanju ulaganja vlada, pozivamo razvijene zemlje, tradicionalne donatore i donatore zemalja u usponu, kao i zemlje sa srednjim dohotkom i međunarodne finansijske mehanizme da povećaju ulaganje u obrazovanje i podrže primenu agende, u skladu sa potrebama i prioritetima zemalja. Svesni smo da je ispunjenje svih obaveza vezanih za Zvaničnu razvojnu pomoć (ODA<sup>9</sup>) od suštinske važnosti, kao i rešenost mnogih razvijenih zemalja da dostignu ciljanih 0,7% izdvajanja iz bruto nacionalnog dohotka

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<sup>9</sup> Official development assistance

(BNP) za ODA – za zemlje u razvoju. U skladu sa njihovim obavezama, podstičemo razvijene zemlje koje to još nisu učinile da ulože konkretne napore ka spomenutom cilju od 0,7% BNP-a za ODA – za zemlje u razvoju. Takođe potvrđujemo značaj aktiviranja svih potencijalnih resursa u podršci pravu na obrazovanje. Preporučujemo bolju koordinaciju i usklađenost u pružanju pomoći, a da prioritet u finansiranju i pomoći imaju zapostavljeni podsektori i zemlje sa niskim dohotkom. Preporučujemo i značajno veću podršku obrazovanju u okruženjima pogođenim humanitarnom i dugotrajnom krizom. Pozdravljamo samit *Obrazovanje za razvoj* u Oslu (jul 2015) i pozivamo konferenciju *Finansiranje za razvoj*, koja će se održati u Adis Abebi, da podrže predloženi SDG 4.

16. Pozivamo organizatore WEF 2015, posebno Unesko, kao i sve ostale partnere, da individualno i kolektivno podrže zemlje u primeni agende obrazovanja 2030 tako što će obezbediti tehničke savete, razvoj nacionalnih kapaciteta i finansijsku podršku u skladu sa svojim mandatima i relativnim prednostima i raditi na nadopunjavanju. Da bismo to postigli, uz dogovor sa državama članicama, suorganizatorima WEF 2015. i drugim partnerima, poveravamo Unesku zadatak da razvije odgovarajući globalni mehanizam koordinacije. Konstatujemo da *Globalno partnerstvo za obrazovanje*<sup>10</sup>, kao finansijska platforma većeg broja interesenata, treba da podrži primenu agende u skladu sa potrebama i prioritetima zemalja i preporučujemo da bude deo ovog budućeg globalnog mehanizma koordinacije.
17. Takođe pozivamo Unesko da, kao specijalizovana agencija UN za obrazovanje, i dalje obavlja poverene zadatke u vođenju i koordiniranju agende obrazovanja 2030, naročito na sledeće načine: zagovaranjem u cilju održanja političke posvećenosti; omogućavanjem političkog dijaloga; širenjem znanja i postavljanjem standarda; praćenjem napretka u ostvarivanju obrazovnih ciljeva; pozivanjem globalnih, regionalnih i nacionalnih interesenata da upravljaju ostvarenjem agende; i na kraju tako što će funkcionisati kao centar za pitanja obrazovanja u okviru opšteg sklopa koordinacije SDG.
18. Rešeni smo da razvijamo opsežne nacionalne sisteme za nadgledanje i procenu kako bismo dobili potpune dokaze vezane za formulaciju politike i upravljanje obrazovnim sistemima i garantovali odgovornost. Zahtevamo od suorganizatora i partnera WEF 2015. da podrže razvoj

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<sup>10</sup> Global Partnership for Education

kapaciteta za prikupljanje, analizu i prikaz podataka na nivou zemlje. Zemlje bi trebalo da rade na poboljšanju kvaliteta, nivoa raščlanjivosti i blagovremenosti u izveštajima Uneskovom Institutu za statistiku. Takođe zahtevamo da *Izveštaj o monitoringu programa Obrazovanje za sve* nadalje bude nezavisni *Izveštaj o monitoringu programa Globalno obrazovanje* (GEMR<sup>11</sup>), čiji će domaćin i izdavač biti Unesko, kao mehanizam za monitoring i izveštavanje o predloženom SDG 4 i o obrazovanju u okviru ostalih SDG, a u okviru šireg mehanizma koji će biti uspostavljen i služiti za nadgledanje i ispitivanje primene predloženih SDG.

19. U raspravi smo postigli dogovor u vezi sa ključnim elementima *Okvirnog akcionog plana Obrazovanja 2030*<sup>12</sup>. Imajući u vidu samit UN za usvajanje plana o razvoju nakon 2015. (Njujork, septembar 2015) i ishode Treće međunarodne konferencije *Finansiranje za razvoj* (Adis Abeba, jul 2015), konačna verzija će biti predstavljena i data na usvajanje na posebnom sastanku na visokom nivou koji će se organizovati u okviru 38. zasedanja Generalnog zasedanja Uneska u novembru 2015. U potpunosti smo predani njenoj implementaciji nakon što bude usvojena, kako bismo inspirisali i vodili zemlje i partnere u postizanju planova.
20. Nastala na nasleđu Džomtijena i Dakara, ova Inčonska deklaracija predstavlja istorijsku rešenost svih nas da preobrazimo živote ljudi putem nove vizije obrazovanja, uz hrabra i inovativna dela, kako bismo do 2030. dostigli naš ambiciozni cilj.

Preveo Mark Daniels

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<sup>11</sup> Global Education Monitoring Report (GEMR)

<sup>12</sup> Education 2030 Framework for Action



**Hronika, Kritika i Polemika**

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**Chronicle, Reviews, Polemics**



## *In Memoriam*



Dušan Savićević 1926-2015.

Alan Knox, Jost Reischmann

### Remembering Dušan Savićević

A reputable colleague and dear friend has left us. He was respected internationally and one of the founding members of the academic discipline of the lifelong and lifewide adult learning and education.

His international presence covers nearly a half century, as Alan Knox, University of Madison, USA, and former president of the American Association of Adult Education remembers: "Our friendship and correspondence begun in 1967, continued for almost 50 years. Dusan and I first met when I was professor of adult education at Teachers College, Columbia University, in New York. He had had received a Ford Foundation fellowship and was to be in Toronto for a week followed by Boston University summer session conference at Exeter where Malcolm Knowles and Alexander Charters were participants. Fifteen years

later, Dusan received a Fulbright fellowship for three months with our graduate program at the University of Wisconsin where he stayed in our house, met with faculty and students, and spend many hours in the library copying materials - he checked his suitcase on the plane back to Belgrade, but carried these “valuable Xerox copies” in his personal bag inside the plane. In 1987, my wife Linda and I received a Fulbright fellowship for three months with Dusan and his colleagues and students at the University of Belgrade.”

One of the tragedies in his life was when he became excluded from the International exchange through the breaking up of Yugoslavia and the war when Serbian passports did not allow travel abroad. This was especially hurting for a polyglot scholar: Beside other places throughout Europe he had been a visiting professor at Simon Rodriguez University of Venezuela, University of Wisconsin, Madison, and People’s Normal University, Beijing, China. He received fellowships from the Danish government, Chilean government, Ford Foundation and Fulbright Foundation to study adult education; he also participated in many national and international conferences and projects, and helped in founding some international non-governmental organizations, working with UNESCO, OECD and Council of Europe. That all became blocked through the sad political situation in and after the 1990’s.

Jost Reischmann, Bamberg University, Germany, and Vice-President of the International Society for Comparative Adult Education (ISCAE) remembers that time: “I met Dusan the first time face-to-face in the mid-1990’s at a conference in Belgrade, supported by dvv-international. I knew him only from literature and what I heard from other colleagues and - being a generation younger - was a bit shy to talk to the ‘great’ Dusan Savicevic. But he was very kind and interested (which became confirmed in the following years when I met him more often). And he told me - and I recognized how moving this was to him: ‘You are lucky that you can travel!’

The time to be able to travel came back. It was for him and for us as his friends a great event when he became inducted into the “International Adult and Continuing Education Hall of Fame” in 2006 in Bamberg, Germany, together with other colleagues who had shared decades of academic development and history (<http://halloffame-europe.andragogy.net/2006-Bamberg/06-HOF-Bamberg.html>). The explanation why he was inducted in this reputable organization provides a good view of what he contributed to the discipline and field (<http://halloffame.oureach.ou.edu/2006-European/savicevic.html>):

“For nearly 50 years, Dusan Savicevic, Ph.D., has made major contributions to the field of adult and continuing education and is re-



garded as one of the leading experts in andragogy (adult education) in South-Eastern Europe. He has worked internationally, in institutions for the development of modern adult education, participating in efforts aimed at enabling all categories of adults to assume greater responsibilities in their professional life and society.

Savicevic's greatest theoretical contributions in the field of lifelong learning are in clarifying the concept of andragogy and education and learning of adults, in setting up strategies for recurrent education, in comparative education of adults, in methodology of research in adult education, in the concept of educational needs of adults, in contemporary concepts in andragogy, in history and evolution of andragogical ideas, and in the philosophical basis of andragogy, as well as in clarifying the process of learning and aging.

Dusan became internationally visible especially in the English speaking world more or less by a misunderstanding. Malcolm Knowles, sometimes being portrayed by his disciples as 'the father of adult education in the USA', describes his encounter with Dusan and the term "andragogy" as follows:

"... in 1967 I had an experience that made it all come together. A Yugoslavian adult educator, Dusan Savicevic, participated in a summer session I was conducting at Boston University. At the end of it he came up to me with his eyes sparkling and said, 'Malcolm, you are preaching and practicing andragogy.' I replied, 'Whatagogy?' because I had never heard the term before. He explained that the term had been coined by a teacher in a German grammar school, Alexander Kapp, in 1833 ..." (Knowles 1989, p. 79).

Malcolm Knowles liked the term "andragogy" so much that he glued this label to his own theory. This was not - as Alan Knox remembers the week after that summer session - what Dusan had in mind: "During the week we were together there, Dusan told me that Malcolm had finished writing the manuscript for a book on the modern practice of adult education and he had asked Dusan about andragogy. He said he had explained to Malcolm and other participants that andragogy was a discipline for the education and learning of adults. Dusan was surprised that Malcolm decided to use the word for his practical arrangements to provide adult education activities". Malcolm Knowles' book "The Modern Practice of Adult Education" was published in 1970 with the subtitle "Andragogy versus Pedagogy".

Dusan's understanding was different, and is shared widely in Europe: "andragogy as a discipline, the subject of which is the study of education and learning of adults in all its forms of expression" (Savicevic 1999, S. 97). And he criticized Knowles:

Where did Knowles go wrong? In our view, the *first* mistake pertains to the definition of andragogy as a „science and art“. He followed the traditional school of thought that pedagogy, as defined by J. Dewey, is „science and art“. The *second* mistake is that he defines andragogy as the science and art of „helping adults to learn“. This way andragogy is reduced to prescription, that is, to issuing recipes for how a teacher should behave in the process of education and learning of adults. The *third* mistake is that Knowles declared andragogy a „model“ for teaching that can be applied even in pre-school institutions. In this way, confusion was increased as regards andragogy. By adopting such stands, Knowles moved away from the original stand on andragogy as „science and art“. The *fourth* mistake was in the fact that he directed andragogy only towards the problems of learning, thus neglecting other dimensions (social and philosophical) without which learning could neither be studied nor understood successfully. The *fifth* mistake is in his individualistic approach to education and learning of adults by glorifying the „self-directed learner“ and the teachers as „facilitators of learning“, without linking this to existent circumstances, the level of education, the nature of contents and other factors on which education and learning of adults depended. Knowles's *sixth* mistake has to do with an insufficient, incomplete study of the historical roots of andragogy, both in American and in European, literature. Such an attitude toward historical data has prompted him to conclude that he is the „first“ to use the term andragogy in the American literature. (Savicevic 1999, S. 114).

“Andragogy”, as it is used in Europe and suggested by Dusan, has the advantage, that separate labels are available for the academic field (Andragogy, Andragogue) and the practical field (Adult Education, Adult Educator), such preventing confusion about the different responsibilities and strengths of each field. Using the same label (as in the USA and some other countries) is destructive for the role and perception of the academic discipline and its graduates: In the everyday perception “everybody” can be labeled as an “adult educator”; this makes it difficult to build with this label a specific professional identity of univer-

sity programs, students and graduates. Dusan was over a half century concerned to build up this specific academic subject and identity, as academic teacher, as speaker on international conferences, and as widely perceived academic author.

Those of us who knew him, his gentleman-personality, his precise knowledge, his engagement and his sparkling eyes when it came to questions about andragogy and adult education, will remember him as a dear friend and a respected scholar.

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Zoran Jelenc

## Dušan Savićević

Nešto manje od mesec dana pre svog 89. rođendana (rođen je 1. jula 1926. godine), u Beogradu je umro profesor Dušan Savićević. Budući da su njegov život i rad značajno povezani sa razvojem obrazovanja odraslih i andragogije u Sloveniji, čini se umesnim da ga se povodom njegove smrti setimo i ponovo predstavimo čitaocima časopisa *Andragoška spoznanja*<sup>1</sup>.

Tokom svog života i na svom profesionalnom putu, prof. dr Dušan Savićević obavljao je niz uloga i aktivnosti. Njihova zajednička odrednica je da su sve u vezi sa obrazovanjem, kao i učenjem odraslih i andragogijom.

Kao ključnu, trebalo bi navesti činjenicu da je bio univerzitetski profesor andragogije i obrazovanja odraslih na Univerzitetu u Beogradu. I više od toga – on je bio šef Katedre za andragogiju, koju ne samo da je osnovao već ju je i vodio dugi niz godina. Vodio ju je „očinskom” brigom za „porodicu” koju je zasnovao i na koju je bio ponosan. Univerzitet u Beogradu je, kao prvi i jedini od univerziteta na prostorima nekadašnje Jugoslavije, isključno njegovom zaslugom imao nezavisnu i jaku Katedru za andragogiju, koja je brojala (i verovatno i dalje broji) više od deset stalno zaposlenih univerzitetskih nastavnika. Ne samo da je svojim studentima bio strog profesor već im je na neki način bio i otac, nije skrivao radost povodom njihovih uspeha<sup>2</sup>. Za svoje studente, za uže saradnike i lične poznanike on je bio Duško. Miomir Despotović, Savićevićev mlađi kolega, izrazio se o svom profesoru na sledeći način<sup>3</sup>: „Brižljivo nas je birao – onoliko koliko se moglo birati i izabrati. Kao ni sebe, ni nas nije štedeo, što mu nećemo zaboraviti, ni oprostiti, posebno kada je uporno tražio ono što se nije moglo dati ili uraditi. Ali, ono što ne možemo da zaboravimo je ljudski i korektan lični odnos prema mlađim saradnicima, koje, počev od prvog radnog dana, nije tretirao kao pomoćnike u nastavnom i naučnom radu, već kao punopravne saradnike; i poštovanje koje im je ukazivao kao akademskim građanima i ličnostima koje zaslužuju svu njegovu pažnju i poštovanje”. O tome šta misli o svojim saradnicima i kolektivu Katedre, Savićević je u intervjuu rekao: „Nauka se ne sastoji od pojedinaca koliki

<sup>1</sup> Profesora smo inače u našem časopisu već predstavljali, poslednji put 2006. godine, povodom njegovog 80. rođendana (Z. Jelenc).

<sup>2</sup> I sâm sam bio svedok takve radosti, kada mu je student doneo da pokaže štampani primerak doktorske disertacije.

<sup>3</sup> Sa skupa povodom 80-godišnjice rođenja profesora, u Beogradu 2006. godine.

god njihov doprinos bio toj nauci. Nauku čine ljudi koji su joj predani i koji bude interesovanje mladih za tu nauku”.<sup>4</sup>

Njegova druga, podjednako važna uloga, bila je vođenje Instituta za pedagogiju i andragogiju na Filozofskom fakultetu Univerziteta u Beogradu. Između Instituta i Katedre svakako je vladala tesna povezanost, što je činilo dobru osnovu za razvoj naučnoistraživačkog rada osoblja i studenata na fakultetu.

Navedene uloge i funkcije, koje su proizilazile iz njih, profesoru Savićeviću su omogućile da, njemu svojstvenim trudom, posvećenošću i istrajnošću, razvija andragogiju kao nauku i univerzitetsku disciplinu, što je dovelo do sticanja novih i dubljih saznanja o obrazovanju i učenju odraslih i do postavljanja daljih i produbljenijih pitanja u toj oblasti.

Na svom profesionalnom putu, koji će trajati duže od 60 godina, u počecima se susretao sa praksom koja se zasnivala na opismenjavanju odraslih, a zatim se bavio organizovanjem rada narodnih univerziteta, biblioteka, čitaonica, tečajeva za opismenjavanje, kao i izveštavanjem o opštinskim i lokalnim kulturnim aktivnostima. Za sebe kaže da je bio andragoški praktičar u pravom smislu te reči. Kao već iskusan praktičar, odazvao se na konkurs Univerziteta u Beogradu za postdiplomske studije, opredelivši se za obrazovanje odraslih. Nakon završenih studija 1958. godine, izabran je za asistenta i tako postao, kao što je i sam rekao, prva plaćena osoba u stalnom radnom odnosu u ovoj oblasti na univerzitetima tadašnje Jugoslavije. Tako započeta, njegova univerzitetska karijera u oblasti andragogije je, kao što smo već naveli, vremenom urodila plodovima koji su prepoznati ne samo u Srbiji i Jugoslaviji već su postali poznati širom sveta.

U okviru stručnog i naučnog rada, predmet njegovog ineteresovanja bile su skoro sve oblasti andragogije – sam navodi kako je naučno područje andragogije izrazito opsežno – a procenjuje da je najviše pažnje posvetio opštoj andragogiji, komparativnoj andragogiji i proučavanju istorije andragoških ideja. Navedenu širinu interesovanja Dušana Savićevića za sva područja andragogije potvrđuju naslovi knjiga koje je objavio. Navešćemo samo neke: „Primena metoda u obrazovanju odraslih” (Zagreb, 1961), „Problemi integracije u obrazovanju odraslih” (Beograd, 1962), „Obrazovanje za život u porodici” (Beograd, 1967), „The System of Adult Education in Yugoslavia” (Syracuse, New York, 1968), „Povratno obrazovanje” (Beograd, 1975), „Čovjek i doživotno obrazovanje” (Titograd 1983), „Komparativno proučavanje obrazovanja i vaspitanja” (Beograd, 1984), „Issues and Problems on Comparative Continuing Education of Adults” (Madison, 1984), „Konceptcija obrazovnih potreba u andragogiji” (Beograd, 1989), „Savremena shvatanja andragogije” (Beograd, 1991), „Priroda i karakteristike interesa

<sup>4</sup> Ovak i svi sledeći citati su iz intervjua objavljenog 2006. godine u časopisu *Andragoška spoznanja* (autor Z. Jelenc).

u andragogiji” (Beograd, 1992). Pisanje i objavljivanje književnih dela nastavio je i nakon penzionisanja i tada je izdao sledeće radove: „Istraživanja u pedagogiji i andragogiji” (Beograd, 1995), „Metodologija istraživanja u vaspitanju i obrazovanju” (Vranje, 1996), „Adult Education: From Practice to Theory Building” (Frankfurt, 1999), „Koreni i razvoj andragoških ideja” (Beograd, 2000), „Put ka društvu učenja” (Beograd, 2000), „Filozofski osnovi andragogije” (Beograd, 2002), „Komparativna andragogija” (Beograd, 2003), „Učenje i starenje” (Beograd, 2005) i „Andragoške ideje u međunarodnim okvirima” (Beograd, 2006).

Savićević je uveren da „gde god se okrenemo, možemo ustanoviti potrebu za novim istraživanjima, novim znanjima o učenju i obrazovanju odraslih” i da „takav trend obezbeđuje budućnost andragogije na našim prostorima”.

Svakako, ne možemo u ovom trenutku nabrojati sve ono što je sa uspehom profesor Savićević uradio. Vodio je niz teorijskih i razvojnih projekata u zemlji i inostranstvu, aktivno učestvovao u radu nacionalnih i međunarodnih konferencija i susreta, kao i u radu značajnih organa Uneska, OECD-a i Saveta Evrope, bio je član redakcija domaćih i međunarodnih časopisa (npr., *International Journal of Adult Education*, *Convergence*, *International Journal of Lifelong Education*, *Andragoške studije*), bio je gostujući profesor na više stranih univerziteta, posetio je ustanove obrazovanja odraslih na svim kontinentima. Delo i dostignuća Dušana Savićevića u oblasti obrazovanja odraslih svrstavaju ga među najistaknutije i vodeće stručnjake u oblasti andragogije u svetu, a ne samo u Jugoistočnoj Evropi. Takođe zahvaljujući njemu, andragogija i profesionalci iz oblasti andragogije iz bivše Jugoslaviji uživali su veliki ugled u svetu<sup>5</sup>. Primljen je u *Međunarodnu galeriju slavnih* u oblasti obrazovanja odraslih, čije se sedište nalazi u Oklahomi. Vlada Srbije mu je dodelila priznanje, a to su uradile i Vlade drugih zemalja (Danska, Čile).

Lik i delo Dušana Savićevića možemo predstaviti i nekim od njegovih najznačajnijih razmišljanja.

*O filozofskom obimu i vrednosti znanja, kao i vrednosti obrazovanja:* „Borba za znanje u 21. veku će biti teža nego što je nekada bila borba za teritoriju. Prema nekim autorima, znanje je izvor moći. Znanje je još u većoj meri nejednako raspoređeno u odnosu na svetsko bogatstvo”.

*O obrazovanju sa stanovišta ekonomske koristi i tržišne logike, u obzir je uzeto i tržište rada:* „Filozofija da obrazovanje predstavlja dobro koje mora biti konkurentno na tržištu vodi ka tome da se obrazovanje usmerava na globalno tržište. U

<sup>5</sup> Da pomenemo samo neke od najistaknutijih, to su, pored Savićevića: Borivoj Samolovčev, Dragomir Filipović (u Srbiji), Nikola Pastuović i Nikša Nikola Šoljan (iz Hrvatske), Ana Krajnc (iz Slovenije). Ašer Deleon je bio član Uneskovske grupe koja je realizovala poznati projekat *Learning to Be*.

takvoj filozofiji obrazovanje predstavlja dobro koje se prodaje u obliku kvalifikacija. Način razmišljanja iz oblasti ekonomije se prenosi na znanje i učenje. Radi se o mehanicističkom pristupu, koji ne može biti prihvaćen bez kritičkog osvrtu i promišljanja. Konceptiju prema kojoj je obrazovanje roba, koja se prodaje na tržištu kao svaka druga roba, potrebno je kritički promisliti i uzeti u obzir filozofske i moralne dimenzije učenja i obrazovanja. Putem takvih shvatanja ekonomska filozofija se prenosi na filozofiju obrazovanja [...]. Filozofija obrazovanja se mora posmatrati mimo tržišta, potrošačke psihologije i psihologije posedovanja. Tačno je da će čovek ovladati tehnologijom, ali je pitanje u čijem interesu. Kakav će biti pogled na svet takvog čoveka koji nema izgrađene univerzalne vrednosti i vrednosni sistem? Filozofija tržišta razbija kulturnu tradiciju, dok koncept holizma podstiče kulturnu i obrazovnu invaziju [...]. Jasno je da širenju znanja i nauke nije moguće postaviti granice, ali je potreban uravnoteženiji model razmene znanja, potrebna je nova konceptualizacija učenja i obrazovanja da bismo mogli razumeti savremeni svet i tržišnu usmerenost znanja u njemu”.

*O razvoju andragogije u svetu u narednim decenijama:* „Ukoliko na razvoj gledam komparativno, očekujem brojne promene u budućnosti. Otvoriće se prostor za procenu, revalorizaciju i naučnu obradu nerazmatranih oblasti. Doći će do nastanka novih andragoških subdisciplina: andragoške futurologije, andragogije za zaštitu života i radne sredine, visokoškolske andragogije, andragogije masovnih komunikacija ukoliko nabrojimo samo neke. Od diferencijacije ćemo se u andragogiji postepeno kretati ka sintezi. Naučne sinteze su onaj element koji će andragogiji dati podlogu kao nauci. Andragogija bi trebalo da stvara opšta znanja koja se mogu primeniti u okviru određenih oblasti i subdisciplina andragogije. Andragogija bi trebalo da se služi jezikom filozofije da bi mogla da počne da otklanja terminološke nejasnoće i da bi mogla da eliminiše pojmovnu dvosmislenost [...]. Procenjivanje različitih paradigmi u andragogiji zahteva temeljno filozofsko i metodološko obrazovanje budućih istraživača i teoretičara. Od toga zavisi budućnost andragogije”.

Ne deluje mi da je potrebno posebno isticati kakvu vrstu povezanosti i uticaja je profesor Dušan Savićević imao u Sloveniji. Dovoljno je da znamo da smo živeli u istoj državi i da se andragogija razvila širom zemlje putem zajedničkih kontakata i drugih oblika saradnje (programa, projekata, zajedničkih nastupa u inostranstvu itd.). Tako je, na primer, Savićević bio šef jugoslovenske delegacije na Uneskovoj konferenciji o obrazovanju odraslih održanoj u Parizu 1985. godine. Među andragozima iz republika bivše Jugoslavije održavani su stalni kontakti, između ostalog i zbog toga što su se republička udruženja povezala u Savez andra-

goških društava Jugoslavije, čije su sednice održavane više puta godišnje, najčešće u Beogradu.

Prevela Tamara Nikolić Maksić



## *European InfoNet Adult Education*

### Uwe Gartenschlaeger: Quality and Equality in World Education<sup>1</sup>

Teachers' qualifications need upgrading, and privatisation of education is a threat, because it promotes inequality. That was two of the main concerns at the World Education Forum in Korea in May. The Forum adopted the Incheon Declaration that stresses a broad outview on education, including adult education and non-formal education.

A transformative vision for education over the next 15 years was adopted at the World Education Forum, which concluded on 21 May 2015 in Incheon, Republic of Korea. The so-called Incheon Declaration was welcomed by the global community, including government ministers from more than 100 countries, non-governmental organisations and youth groups. It encourages countries to provide inclusive, equitable, quality education and lifelong learning opportunities for all.

#### *Development Goals for 2030*

The Incheon Declaration underpins the education targets in the Sustainable Development Goals (SDGs) that will be ratified at the United Nations in September, and that will replace the Millennium Development Goals (MDGs), ratified in 2000. In the Declaration, representatives agreed on suggesting "Equitable and inclusive quality education and lifelong learning for all by 2030" as the global goal.

This reaffirms the commitment made in the framework of the Education for All (EFA)-process for a holistic understanding of education. Discrimination because of age, sex, social status or ethnic group should be eliminated. Based on an understanding of education as a human right, the declaration stresses the

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<sup>1</sup> Preuzeto sa internet stranice <http://www.infonet-ae.eu/>

need for an integrated approach, which provides equal opportunities for all and ensures high quality education.

The Declaration marks a success for the advocacy efforts of the global adult education community to ensure that the global agenda won't be limited to formal education with primary, secondary, vocational and higher education sectors only.

However, what still remains open is how this broad commitment will be put into operation. A lot depends on the upcoming debates in New York on the SDGs in September, where the goal will finally be equipped with a set of targets that will shape the agenda for the next 15 years. Another important process deals with the formulation of measurable indicators, which is scheduled for the first months of the coming year.

Only if the adult education community will be able to suggest and get robust indicators approved for the sub-sector will we have the chance to be recognised. At least this is the lesson learnt from the Education for All process, where youth and adult education was neglected, mostly due to the lack of quantitative indicators.

### *Lack of European interest*

Looking through a European lens, it was disappointing to witness the low level of most of the government delegations. Whereas Asian and African countries were mostly represented by ministers or vice-ministers, most European countries sent only civil servants, a large part of them from the institutions responsible for development cooperation.

There is some evidence to fear that the new global education agenda will again be mainly for the "global South", with a lot of influence being lost in Europe, especially in competition with respective European frameworks or national agendas.

### *Room for improvement*

The two days before the WEF were dedicated to the NGO Forum, where civil society representatives shaped their view on the education agenda. One focus was the call for an inclusive and holistic concept of education, which is based on human rights and the concept of lifelong learning, a demand, which was shared by the Incheon Declaration.

Delegates emphasised that quality education is possible only with well-paid and qualified teachers and trainers in all segments of the system, who have possibilities for constant training and upgrading. Case studies and presentations

showed that in many regions of the world and especially in non-formal education a lot remains to be improved.

Another major concern was the growing tendency towards privatisation in education, which already affects all sub-sectors and promotes growing inequality. Governments in many parts of the world use this trend to reduce spending for education, despite the negative consequences, especially for marginalised groups.

### *The Korean experience*

The event was accompanied by several impressive presentations by the Korean hosts, who highlighted the investments in education during the last 60 years as one of the main success factors for the development of their country.

The Korean vision for the future focuses very much on global citizenship education and creativity as objectives for the education system. Whereas this seems to be a reaction to what is perceived as crucial for the competitiveness of the country, the idea of “happiness education” as a subject might also be a reaction to the costs of the Korean way: e.g., each day, three students commit suicide due to an atmosphere of immense pressure to be successful.



## Prikaz knjige

# Aleksandra Pejatović i Violeta Orlović Lovren: Zaposlenost i obrazovanje posle pedesete<sup>1</sup>

Potrebna je velika hrabrost da se, nakon četvrtine veka obeležene ratovima, sankcijama, privatizacijom, izbeglištvom, masovnim gubitkom posla i osiromašenjem, andragoški suočimo sa obrazovanjem one ciljne grupe koja je ne samo u Srbiji već i u celom regionu podnela (i još podnosi) najveću žrtvu. Dve autorke koje su demistifikovale fenomen obrazovanja posle pedesete godine u svrhu zapošljavanja i koje su se uhvatile u koštac sa ovim andragoškim tabuom su dr Aleksandra Pejatović i dr Violeta Orlović Lovren, vanredni profesor i docent na Odeljenju za pedagogiju i andragogiju Filozofskog fakulteta u Beogradu, čiju monografiju *Zaposlenost i obrazovanje posle pedesete* preporučujem pažnji ne samo stručne, andragoške javnosti već i kreatorima obrazovnih politika, ali i osobama o kojima i govori monografija – o onima sa pedeset godina i više. Monografiju, obima 266 strana, objavili su 2014. godine Institut za pedagogiju i andragogiju Filozofskog fakulteta Univerziteta u Beogradu i Društvo andragoga Srbije, a sačinjavaju je 236 strana osnovnog teksta, strukturiranog u četiri zasebne celine (*Predgovor, Teorijski okvir za razmatranje međuodnosa obrazovanja i nezaposlenosti, Empirijsko razmatranje međuodnosa obrazovanja i nezaposlenosti i Zaključna razmatranja i predlog mera za ublažavanje problema nezaposlenosti 50+*), rezime na engleskom jeziku, kao i spisak korišćene literature sa više od 130 upotrebljenih jedinica.

U prvoj rečenici *Predgovora* autorke nas konkretno uvode u kontekst situacije u kojoj se svi nalazimo: „U Srbiji, već duže vreme, nije lako naći prvi posao, nije lako zadržati posao i nije lako kao nezaposlen ponovo doći do posla.“ Bez „ružičastih naočara“ autorke nam predočavaju alarmantnu situaciju u kojoj se svi nalazimo, ali koja najviše pogađa „srebrne radnike“ (radnici sa 50+ godina). Među 656.120 osoba koje su 2013. godine u Srbiji imale status nezaposlenih čak

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<sup>1</sup> Pejatović, A. i Orlović Lovren, V. (2014). *Zaposlenost i obrazovanje posle pedesete*. Beograd: Institut za pedagogiju i andragogiju Filozofskog fakulteta u Beogradu i Društvo andragoga Srbije.

21,96% je starijih od 50 godina, a ono što situaciju čini težom jeste što oni kao roditelji često izdržavaju svoju nezaposlenu decu. U ovakvom kontekstu, autorke uz pomoć saradnika sprovode istraživanje na uzorku od 387 osoba koje su teška srca odgovarale na postavljena pitanja jer, kako reče jedna ispitanica, „pitanja su mi bila baš emotivno teška jer ovo je priča o mom životu“.

Druga veća celina monografije pojašnjava nam pojmove nezaposlenost i nezaposleni, predočava različite vrste nezaposlenosti, opisuje savremeni svet rada, koji predstavlja kontekst fenomenima zaposlenosti i zapošljivosti, analizira uzroke i efekte nezaposlenosti, naglašava višestruke veze između obrazovanja i nezaposlenosti i na kraju navodi i kritički ocenjuje aktivne mere tržišta rada ne ograničavajući se na teritoriju Republike Srbije, već ih analizira na globalnom nivou.

Iako je statistički gledano, od početka ovoga veka, ekonomski rast konstanta u Srbiji, ovo „jevanđelje“ ne stiže do starijih radnika: oni se teže zapošljavaju, opada broj poslova koje mogu da obavljaju stariji i davno formalno i inicijalno obrazovani ljudi, a tehnološki napredak i privatizacija ovoj populaciji deluje kao najozbiljnija pretnja. Pola veka star evropski čarobni štapić za povećanje zapošljavanja mladih, koji su kasnije i Srbi pozajmili – stimulisanje ranog penzionisanja – kao bumerang se vratio i udario u socijalne fondove uslovljavajući sada obrnut trend – povećanje starosne granice za odlazak u penziju, što je direktno rikošetiralo u planove starijih da relativno ranijim odlaskom u penziju reše svoje egzistencijalne probleme. Autorke ističu da je stvorena stereotipna slika o starijim radnicima kao pasivnim, nesposobnim za učenje i nezainteresovanim za rad, što, naglašavaju one, nažalost, postaje i deo selfa samih nezaposlenih osoba starijih od 50 godina. Međutim, na osnovu savremenih trendova i kriterijuma nije lako kvalifikovati se ni u grupu nezaposlenih, jer ova kategorija zahteva prilične aktivnosti kako bi se „ovenčali“ pomenutim statusom. Prema definiciji ILO-a, pod pojmom *nezaposleni* smatra se osoba koja u posmatranoj sedmici nije obavila nijedan plaćeni posao, nije odsustvovala sa posla na koji bi mogla da se vrati, ali je u poslednje četiri sedmice preduzimala aktivne korake u cilju nalaženja posla. Dakle, i status nezaposlenog treba „zaslužiti“, a oni koji ne preduzimaju pomenute aktivnosti smatraju se nezainteresovanim i obeshra-brenim. Autorke nam predočavaju da pojam nezaposlenosti nije jednoznačan i sam po sebi jasan i definisan pojam, već se mora dodatno pojasniti jer postoji više vrsta nezaposlenosti – frikciona, dobrovoljna, strukturna, dugoročna, prikrivena... Pej-tović i Orlović Lovren, nažalost, potpuno ispravno konstatuju da su na tržištu rada u našoj zemlji zastupljene sve navedene vrste nezaposlenosti.

Karakteristike savremenog sveta rada, kao konteksta za ostvarivanje zaposlenosti i zapošljivosti, ne idu naruku generacijama 50+. Globalizacija, prodor informaciono-komunikacionih tehnologija, ekonomija znanja, složena podela rada, zaokret ka sektoru usluga, porast poslova za čije obavljanje su potrebni viši

nivoi obrazovanja, tendencije ka obavljanju paralelnih poslova, fleksibilni oblici radnog angažovanja i povećana mobilnost radne snage samo su neke od pomenu-tih karakteristika koje su zatekle „srebrne radnike“ nespemne, začuđene nad svetom koji im se pred očima promenio u nepovrat, ogorčene, prevarene i nemoćne.

U ovom kontekstu odnos između obrazovanja i nezaposlenosti je izuzetno kompleksan, sa velikim brojem intervenišućih varijabli, a Pejatović i Orlović Lovren su ga detaljno analizirale kroz prizmu formalnog i neformalnog obrazovanja. Autorkama deluje „kao da su starije osobe 'pogrešno' iskoristile šanse koje im je pružio formalni supstern obrazovanja, kao i da ne koriste mogućnosti koje im danas pruža neformalni supstern obrazovanja“. Pitanje koje s pravom postavljaju je: Usled čega se obrazovna ponuda u ovim sektorima mimoilazi sa obrazovnim potrebama starijih polaznika? Ono što očigledno „bode“ oči stručnoj javnosti, a „prelama“ se preko leđa starijih polaznika je već tradicionalna diskrepancija između zvaničnih srpskih politika koje se bave ovom problematikom i njihove implementacije. Legislativa po ovom pitanju je bogata odredbama i rešenjima, od Ustavom zagaranovanog prava na rad, preko podsticaja radnicima od 50 do 64 godine, sadržanih u *Nacionalnoj strategiji zapošljavanja 2011–2020*, u pratećem *Akcionom planu*, u *Strategiji starenja Republike Srbije*, u *Zakonu o zapošljavanju i osiguranju za slučaj nezaposlenosti*. Ono što autorkama uliva pesimizam po ovom pitanju je odsustvo garancije da će se desiti primena mera kako je to planirano, odnosno da efikasnost varira u odnosu na svaku konkretnu primenu, a posebno ističu problem borbe sa masovnom nezaposlenošću primenom aktivnih politika na tržištu rada. Ono što već sivu sliku boji u crno je odnos osoba 50+ prema aktivnim merama tržišta rada i ličnoj participaciji u pomenutim merama. Ovome naročito doprinosi pojava pratećih efekata dugoročne zaposlenosti koje, kao bukagije, vuku pripadnici ove populacije: siromaštvo, socijalna isključenost, nemogućnost zadovoljavanja osnovnih egzistencijalnih potreba. Autorke navode i alarmantne podatke dobijene na osnovu istraživanja u Hrvatskoj da pad ka siromaštvu i socijalnoj isključenosti počinje već posle prve godine od gubitka posla! Ovaj pad stvara osetne posledice po psihofizičko zdravlje parališući nezaposlene u nastojanjima da se aktiviraju po pitanju pronalaženja posla.

U trećoj strukturalnoj celini monografije predstavljeni su rezultati empirijskog istraživanja sprovedenog 2013. godine u pet gradova u Srbiji na uzorku od 387 nezaposlenih osoba starijih od 50 godina. Rezultati ovog izuzetno zanimljivog istraživanja pokazuju da su rezultati istraživanja sprovedenog u Hrvatskoj aplikativni i u našoj zemlji – period od godinu dana bez posla je period ulaska u dugotrajnu nezaposlenost, a osetno pasiviziranje u izboru strategija suočavanja sa ovim problemom se dešava posle pet godina nezaposlenosti. Žene i starije osobe češće koriste beg od problema kao strategiju rešavanja problema, čime se razlikuju

od ostatka uzorka, a minimiziranje značaja posla raste sa godinama nezaposlenosti. Sa andragoškog aspekta je posebno interesantan dobijeni podatak da viši nivo obrazovanja ispitanika ne garantuje dugoročno da neće doći do negativnih reakcija (pasivizacija i socijalna isključenost), ali ipak ispitanike održava aktivnim u nastojanju da nađu dugoročniji posao prilagođen njihovim kvalifikacijama.

U okviru istraživanja autorke su ispitale i kvalitet života nezaposlenih osoba starijih od 50 godina i dobile očekivane, poražavajuće rezultate: život u teškim materijalnim uslovima, prihodi u domaćinstvu su nedovoljni i nesigurni, lečenje im je otežano, ne postoji mogućnost unapređenja života, a značajan je i stepen socijalne isključenosti. O tome govori i zadovoljstvo, odnosno nezadovoljstvo ispitanika određenim životnim domenima: najmanje su zadovoljni ukupnim prihodima domaćinstva, poslom i ekonomskim stanjem u zemlji, a najzadovoljniji sopstvenim moralnim likom, decom i porodicom. Nažalost, vrlo retko nezaposlenost deluje kao okidač za aktuelizovanje novih snaga za prevazilaženje životne situacije u kojoj su se našli.

Na kraju, Pejatović i Orlović Lovren zaključuju da se dugoročna nezaposlenost „nepovoljno odražava na sve segmente individualnog i socijalnog života pojedinca, pri čemu postoji slaba spremnost ispitanika za participaciju u postojećim programima i aktivnostima obrazovnog karaktera, projektovanim u cilju prevazilaženja problema nezaposlenosti“. Ipak, autorke zadržavaju andragoški optimizam, uverene da su primena koncepcije celoživotnog učenja, zatim uvid u postavke modernih teorija profesionalnog razvoja, poštovanje politike zapošljavanja i aktivnog starenja i naglašavanje vrednosti radnog iskustva i potencijala za mentorstvo koje imaju stariji radnici samo neki od argumenata koji govore o potrebi redefinisavanja pristupa pospešivanja zaposlenosti, kao i mera koje bi trebalo da dovedu do toga. Autorke ne ostaju samo na opštim mestima o potrebi „redefinisavanja mera“ već kao vlastiti doprinos procesu borbe protiv nezaposlenosti i, što je još važnije, njene prevencije predlažu listu od 19 mera koje bi trebalo da ublaže ne samo nezaposlenost već i brojne negativne aspekte koji su sa njom povezani, a na koje autorke upozoravaju.

Svojom aktuelnošću, širinom, beskompromisnošću, kritičkim i prokreativnim odnosom prema predmetu proučavanja, ali i ljudskim odnosom i empatijom usmerenim na ispitanike istraživanja, monografija *Zaposlenost i obrazovanje posle pedesete* bi morala biti prihvaćena kao nezamenljivo andragoško štivo, namenjeno ne samo stručnoj već i široj javnosti, koja služi kao katalizator razumevanja problema koji se nalazi svuda oko nas. Stoga mi je posebno zadovoljstvo da ovu monografiju preporučim pažnji svima koji ne zatvaraju oči pred problemom nezaposlenosti i obrazovanja posle pedesete godine života, već su spremni na hvatanje u koštac sa njim, hrabro se upuštajući u nepoznato.

Jovan Miljković



**KONFERENCIJE I PUBLIKACIJE**

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**CONFERENCES AND PUBLICATIONS**



## Odabrane andragoške konferencije za 2015. godinu

1. *ESRALE Summer Academy "EMPIRICAL RESEARCH IN ADULT LEARNING AND EDUCATION - Conceptual and Methodological Problems"*, 14-20 September, Faculty of Philosophy, University of Belgrade, Serbia.
2. *ECER 2015 "Education and Transition. Contributions from Educational Research"*, 7-11 September Corvinus University of Budapest, Hungary.
3. *The 2015 conference of the ESREA research network on Gender and Adult Learning, "Contemporary Issues and Perspectives on Gender Research in Adult Education. History, Philosophy, Methodology and Practice"*, 8- 10 October, Faculty of Philosophy, University of Belgrade, Serbia.
4. *The 2015 conference of the ESREA research network on Education and Learning of Older Adults, "Lifelong learning for older adults: Hopes, fears and expectations"*, 14-16 October, Jönköping University, Sweden.
5. *The 2015 conference of the ESREA Research Network for Adult Educators, Trainers and their Professionalisation (ReNAdET), "4th Biennial meeting of the ESREA Research Network for Adult Educators, Trainers and their Professionalisation (ReNAdET)"*, 11-13 November, Open University of Cyprus.
6. *The 2015 conference of ESREA research network Access, Learning Careers & Identity, "Continuity and Discontinuity in Learning Careers: Potentials for a Learning Space in a Changing World"*, 25-27 November, University of Seville, Spain.



## Pregled andragoških časopisa

### *Adult Education Quarterly, February 2015, Vol. 65, Issue 1*

Laura Ruth Johnson, Colleen Stribling, Anne Almburg, and Gail Vitale. "Turning the Sugar": *Adult Learning and Cultural Repertoires of Practice in a Puerto Rican Community*. pp. 3-18; Hongxia Shan and Pierre Walter. *Growing Everyday Multiculturalism: Practice-Based Learning of Chinese Immigrants Through Community Gardens in Canada*. pp. 19-34; Arnd-Michael Nohl. *Typical Phases of Transformative Learning: A Practice-Based Model*. pp. 35-49; Heidi Knipprath and Katleen De Rick. *How Social and Human Capital Predict Participation in Lifelong Learning: A Longitudinal Data Analysis*. pp. 50-66.

### *Adult Learning, 2015, Vol. 26, Issue 1*

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*Reality: An educationalist perspective.* pp. 61-83; Terri Bourke, John Lidstone, and Mary Ryan. *Schooling Teachers: Professionalism or disciplinary power?* pp. 84-100.

*Journal of Higher Education Policy and Management 2015, Vol. 37, Issue 5*

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